

Learning and Development
Framing a Systematic Approach

Framework



Brandon Hall Group Research Team
2019

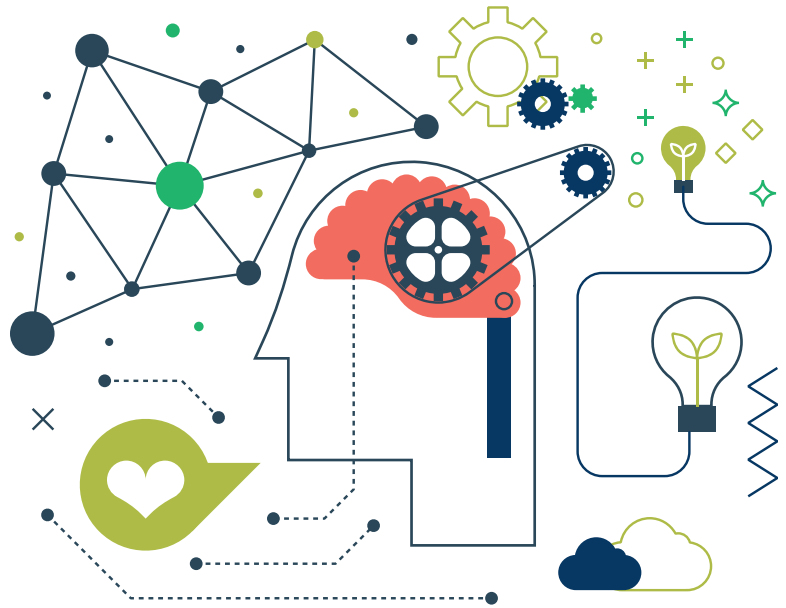
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Introduction

Learning and Development (L&D) is the biggest, most integral and complex piece of the talent-management puzzle. It can also be one of the biggest budget line-items. As such, it requires a great deal of planning, strategy, time and resources from organizations of all size, in all industries.

The good news is they recognize the importance and impact of a learning strategy. More than three-quarters of organizations in Brandon Hall Group's Learning Strategy Study say their learning strategy is effective in helping achieve business goals.



As business needs change and technology evolves, companies discover they must establish a formal learning strategy or reevaluate an existing one. Either way, the goal is to devise a strategy that has a direct impact on performance and the bottom line.

There is no silver-bullet strategy to solve all things for all companies. Based on our extensive research and deep insights, Brandon Hall Group developed this framework as a blueprint to help organizations build a strategy by focusing on their unique requirements, drivers and success levers.

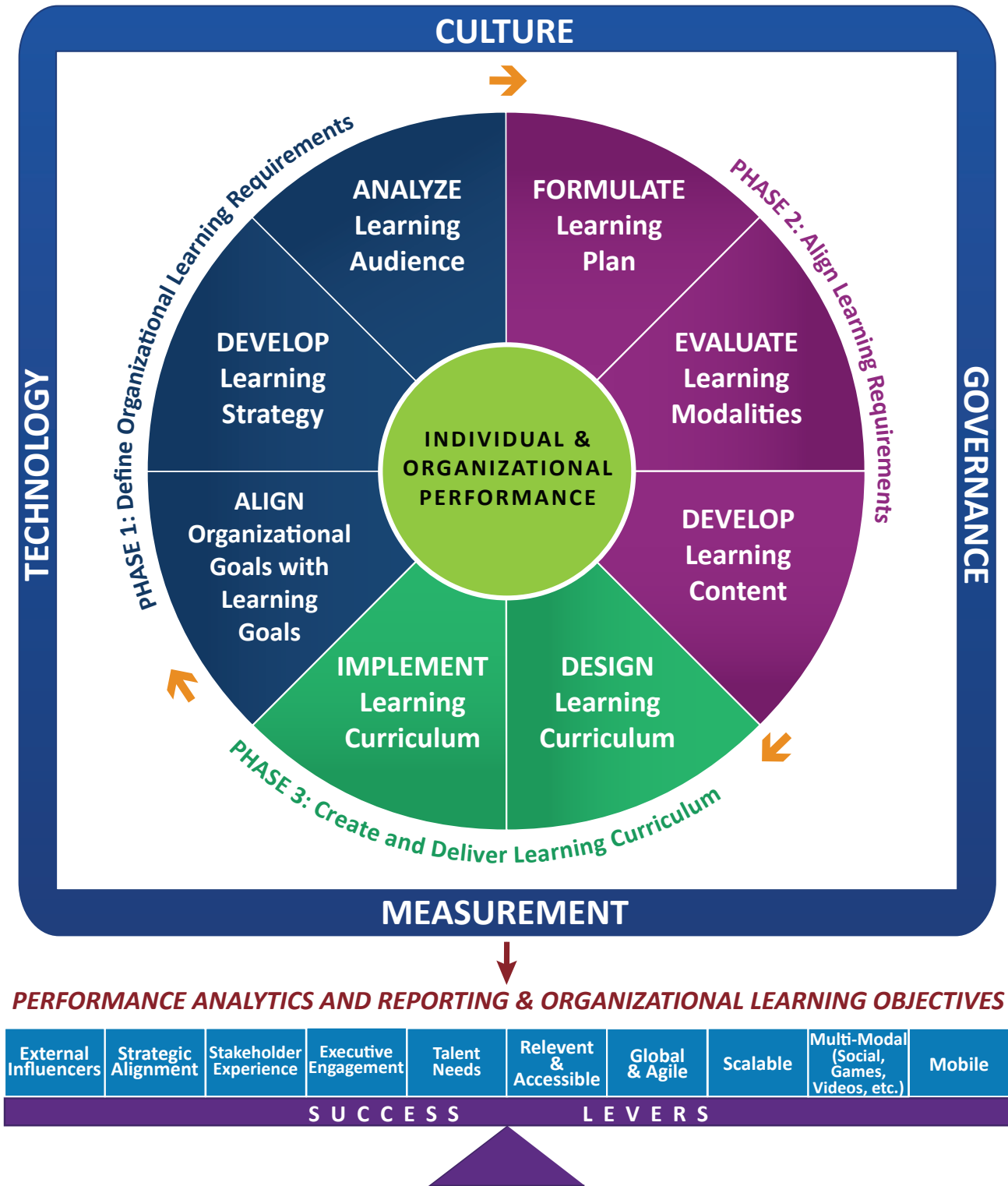
The Learning and Development Framework consists of the internal and external environment, the main components of learning from strategy to execution, and the critical success factors organizations must possess to successfully execute their plan. This paper discusses these external factors, the high-level definition of the elements of Learning and Development, and an overview of the critical success factors.

The High-Performance L&D Framework

The Learning and Development framework, as illustrated below, consists of four major components:

- **Contextual Frame:** Organizational culture, governance structure, technology environment and measurement processes which influence and are influenced by Learning and Development.
- **L&D Lifecycle:** The three basic phases the L&D process is built upon: Defining learning requirements, aligning with the business and creating the curriculum. Effective learning requires a solid foundation based on the needs of the business — and the learners.
- **Links to Performance:** The goal of the learning strategy is not learning for its own sake. It must have a significant, positive impact on individual and organizational performance. Each phase of the process must be viewed through this lens.
- **Success Levers:** Scalability, multi-modal learning, the ability to leverage relationships and other critical success factors that must be considered as organizations develop their learning strategy.

Figure 1: High-Performance Learning and Development Framework



Source: Brandon Hall Group Research

The Contextual Framework

The contextual frame consists of four major components: Culture, governance, technology, and measurement. Understanding these four components is a critical first step for organizations implementing the Learning and Development framework, as they dictate the environment in which these processes and technologies operate.

1 Culture

Culture is often hard to define but one of the things that makes a company an employer of choice. It also has a huge impact on how things get done. No one-size-fits-all culture works, as each industry, company and location may have unique values. Even using broad definitions, organizations in the L&D Benchmarking study are spread across four different culture types.

33%: Collaborative

Open and friendly; people share and are collegial, with a strong sense of tradition. The organization values teamwork, participation and consensus.



27%: Controlling

A highly structured and formal place to work; rules and procedures govern behavior. Maintaining a smooth-running organization is incented. Stability, performance and efficient operations are long-term goals. Success is based on dependable delivery, scheduling and controlling costs. Management promotes security and predictability.



12%: Creative

A dynamic, entrepreneurial and innovative place to work; originality and risk-taking are encouraged by leaders and employees. A commitment to experimentation and out-of-the-box thinking is incented within the organization. Leaders strive to be on the cutting edge. Individual initiative and freedom are valued.



28%: Competing

A results-driven organization focused on job completion; leaders are demanding, competitive and productive. Winning is emphasized and incented. Success is defined by increasing market share and penetration. Competitive pricing and industry leadership are important.



As an example of the influence culture has, 59% of companies with a competing culture say they have a formal learning strategy and 71% of those with collaborative cultures say the same. Also, the number one driver of learning strategy for collaborative culture organizations is prioritizing business needs and aligning learning, HR and the business. For creative cultures, the number one priority is developing strategies to address L&D needs.

Culture has a unique role in Learning and Development and must be considered when developing L&D programs. But learning is itself a major influencer of culture in the organization. By teaching people how to do things, and developing them into the employees and leaders the organization needs, the learning function supports and strengthens culture. Culture's place in the contextual framework is critical and pivotal.

2 Governance

Without governance, plans can fall apart and learning becomes reactive, at best. Establish responsibility and accountability for the learning function, set priorities, communicate, make decisions, measure progress and define outcomes. Given the size of the typical learning budget, it is critical to set the objectives, scope and resources for a governance structure to support the learning strategy.

There are many options for a governance model, but the critical elements include:

- **Background.** A clear definition of the goals for learning, talent and the business.
- **Structure.** The configuration of the learning organization, including defined leadership roles.
- **Objectives.** Specific purposes for the governance model to accomplish.
- **Delivery.** Definition of the processes and programs by which HR services will be provided.
- **Measurement.** A list of metrics used to measure the effectiveness of the governance model.
- **Members and responsibilities.** Identification of the participants in the governance team, as well as critical roles and key responsibilities.
- **Processes and programs.** Identification of critical procedures to run through the governance process.

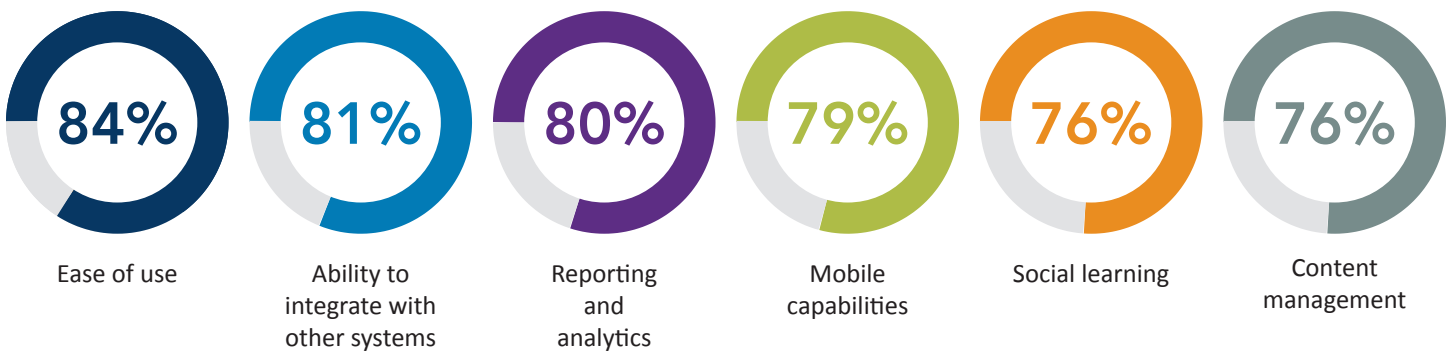
3 Technology

Technology is a large piece of the L&D puzzle for any organization, whether it is developed in-house or comes from third-party providers. In fact, learning technology represents about 20% of the average learning budget, more than anything except for overall headcount. There is wide variety of learning technology solutions available to meet any organization's needs. While some companies only require one, others use multiple solutions and platforms to aid in learning development, delivery and measurement.

Learning Management System (LMS)

The LMS is typically the centerpiece of the learning-technology environment. These platforms allow a company to manage learners, content and curricula. According to Brandon Hall Group research, 82% of companies currently use an LMS of some sort. But widespread use does not necessarily translate into total effectiveness. There are quite a few areas where companies would like to see improvement in their LMS. In fact, about 37% of organizations are looking to switch to a new LMS provider in order to meet these needs.

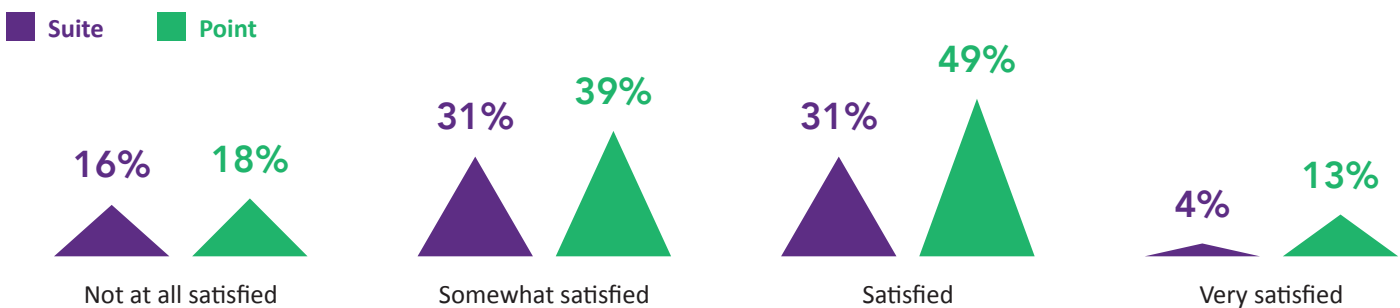
Figure 2: LMS areas in need of the most improvement



Source: Brandon Hall Group Learning Technology Study

Another key consideration for this type of technology is whether the solution will be a standalone LMS or part of a larger suite of talent management technologies. A majority of companies (57%) use a single-point LMS solution, while 43% use one that is part of a suite. Those using a point solution give slightly higher satisfaction rates.

Figure 3: LMS Satisfaction: Suite vs Standalone



Source: Brandon Hall Group Learning Technology Study

Content Authoring

While there are resources for generic learning content that can be used by almost any organization, just about every company needs content that is specific to their business and procedures. Vendors can build content but organizations often choose to create their own. In fact, 89% of companies use at least one of the myriad authoring tools available. These tools allow users to create almost anything: enhanced PowerPoint presentations, click-through storyboards, videos, games, simulations and more. Two-thirds of companies employ two or more tools and two-thirds of large companies (more than 10,000 employees) use three or more tools.

While most LMS platforms have content-authoring features, many organizations seek other providers for authoring. More than half (51%) of companies say they want to improve their content-authoring capabilities when they acquire a new LMS.

Learning Content Management System (LCMS)

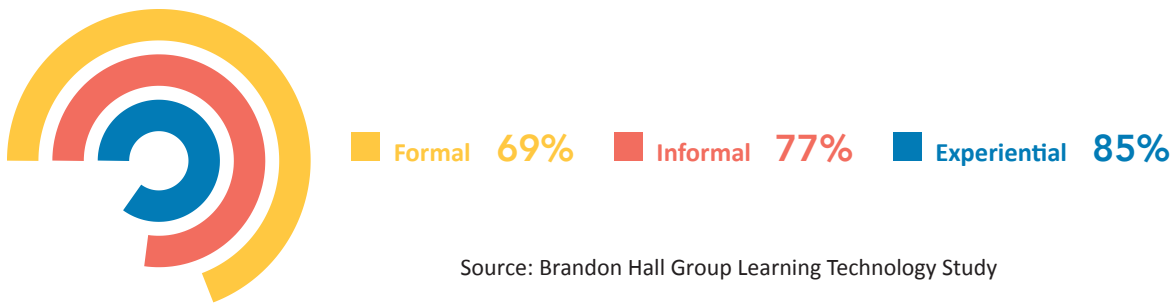
While companies may have resources to acquire and create content, and perhaps an LMS for delivery, managing the content is an entirely different matter. Organizations often build their own tools on a content-management platform like SharePoint. But these types of solutions aren't specifically designed to meet the unique needs of the learning environment. Seventeen percent of companies using an LMS also use an LCMS and 25% seek to add one. About 61% of companies overall use an LCMS (one-quarter of those are internally developed systems). A true LCMS, however, provides organizations with a means to create learning content and manage it in more flexible and user-friendly ways than a typical content management system.

Social/Collaborative Tools

According to Brandon Hall Group's Learning Strategy Study, to be effective at their jobs, 64% of companies say their employees must connect with learning resources either weekly or daily. In an environment heavily focused on formal learning, that may be impossible.

Despite the research behind the 70:20:10 learning model which indicates only 10% of organizational learning takes place in a formal setting, companies spend a huge amount of time and resources on formal learning content and tools. There is clearly a seismic shift underway, however. Organizations now recognize the importance of other learning modalities.

Figure 4: Importance of learning types



Source: Brandon Hall Group Learning Technology Study

A clear majority of organizations see experiential and informal learning as either important or critical to their business. Companies plan to continue to increase their focus in this area.

A wealth of social and collaborative tools allows companies to facilitate and encourage the type of informal and on-the-job learning that previously happened by chance. We now see learning environments complete with blogs, shared media, discussion boards and multiple communication tools designed to keep learners connected to learning and each other. Social and collaborative learning leverages the wisdom of crowds.

Here are some of the most effective tools:

- **Discussion forums.** Learners can ask each other questions about courses, content or procedures. While this may have previously taken place in a hallway or break room, now everyone can contribute and benefit.
- **Learner comments.** Allowing learners to comment on courses, content and curricula provides previously unavailable input. People value peers' opinions. Comments also provide useful insights into the quality of the material.
- **Expert directory.** Having a resource that enables people to identify experts is invaluable. A directory listing the expertise of its members allows learners and others to quickly find the answers to their queries.
- **Learner-generated video.** Video is one of the more effective learning tools. Content created by learners adds authenticity and value. Sharing best practices in an easily accessible visual medium can be extremely powerful.
- **Mobile Delivery Tools.** Despite the ubiquity of mobile devices and their potential, we are still in the early stages of mobile learning. Mobile learning must play an important role in the overall learning strategy, not by simply allowing access via portable devices. The depth and complexity of the mobile strategy depends greatly on organizational goals, learning objectives and audience preferences.

4 Measurement

It is impossible to know learning's impact without proper measurement. When programs are designed, metrics must first be defined. Determining metrics after the fact leads to poor measurement and lack of alignment with business goals. Though most organizations use simple metrics like course completions or smile sheets to measure learning, they can be applied to almost anything without forethought or planning. And while they may give insight into the efficiency of an organization, they shed no light on learning's efficacy. High-performing organizations are more likely to use actual outcomes to measure learning, gaining true insight on its impact on the organization.

Arguably the most common way companies measure learning is with the Kirkpatrick Model:

- **Level 1** How participants react to the training. More than 92% of companies measure at least some of their programs at this level, with 62% measuring more than three-quarters of their programs.
- **Level 2** How participants acquire the intended knowledge, skills, attitudes, confidence and commitment based on their participation in a training event. About 90% of companies measure programs at Level 2.
- **Level 3** How participants apply what they learned during training when they are back on the job. About 80% of companies measure programs at Level 3, but typically less than half of the programs.
- **Level 4** How targeted outcomes occur as a result of the training event and subsequent reinforcement. Less than two-thirds of companies make it to this level and they typically measure fewer than 25% of their programs at Level 4.

In fact, many companies use these measurements without realizing they are employing this model. But it's important to use it properly. Level 1 is the easiest to measure, using smile sheets and feedback, but it also provides the least actionable information. Whether or not learners like or dislike a program does not provide much insight into its effectiveness. However, it is a good place to start, given its simplicity.

The other levels get gradually more difficult to measure, so fewer programs are measured at each successive level. But the insights they provide get at the heart of learning effectiveness and its alignment to business goals.

ALIGN

Organizational Objectives with Learning Strategy

A learning strategy is useless if it doesn't align properly with organizational goals. Learning does not occur in a vacuum; its purpose is to equip and empower the workforce to achieve the goals of the business. The learning strategy must closely align with the overall business strategy and desired business outcomes. Seventy-eight percent of companies say that aligning learning strategy with the business is either important or critical to achieving their business goals. However, half of companies say this alignment presents a challenge to a high or very high extent, and only 18% say they are ready to take action.

In today's organizational culture, creating a positive return on investment for all functions is vital. The Learning and Development team must articulate a quantifiable return on investment for their efforts. The logical place to start is by evaluating how learning can be linked to corporate objectives. Organizations must know how it impacts not just individual performance, but overall organizational performance.

For learning to be linked to performance, it must be designed to be performance oriented. An organization can demonstrate the connection between following the learning curriculum and meeting organizational objectives by measuring workforce behavior changes and resulting performance improvements.

DEVELOP

A Learning Strategy

Eighty-three percent of companies say they have a Learning and Development strategy in place, but only one-third say their strategy is either effective (27%) or very effective (6%). Developing a learning strategy requires input from all areas of the organization. While the CEO or CLO may be ultimately responsible, stakeholders come from a wide range of functions.

Bringing them together can be the biggest challenge facing learning strategy development.

The learning strategy is the execution plan for meeting corporate objectives based on the collective learning accomplishments of the workforce. The strategy is the blueprint for assessing the requirements of the organization's learning framework and how it will drive organizational performance. The strategy process provides an organization with the opportunity to conduct a 360-degree assessment of their learning architecture to understand where they should focus and the environmental factors that influence the impact of the learning initiatives. The strategy process can also identify the strengths and weaknesses of the learning structure across the organization to evaluate people, processes and systems currently in place to see if they can support the future learning needs of the organization. The strategy also prompts thinking around learning governance, budget and measurement.

ANALYZE

The Learning Audience

Understanding learners' needs is critical to an effective learning strategy. Blindly creating a strategy and executing it is a recipe for disaster. An understanding of the demographics, roles and preferences of the learners can greatly inform the strategy, its design and delivery.

Here are two factors to consider when analyzing the learning audience:

Learning Environment – Where a learner is located has a significant impact on their ability to efficiently and effectively learn. Organizations are taking on more decentralized workforce environments that complicate the ability to develop and deliver learning to them. Understanding these learning audiences' needs is critical to the success of the initiative. The impact on content, instructional design and device delivery must be carefully evaluated.

Learning Styles – Learning is rapidly evolving. The impact of social media and mobile devices on a learner’s everyday world changed how they expect to access information in the work world. In addition to social media and mobile devices, learners also expanded the ways they learn most effectively and efficiently. Organizations found that a one-size-fits-all strategy is ineffective. Learners now require a multimodal approach. Blended learning is now more than a combination of in-person and online learning. It now encompasses experiential learning, such as gaming and simulation, and learning portals like MOOCs. The multimodal learning concept is driven by learners that achieve greater success than they did attending a class or through reading about a subject.

In summary, understanding your learning audience is the most important aspect of linking learning to performance. Without knowing the needs of your audience, learning will never drive breakthrough performance.

FORMULATE

The Learning Plan

A learning plan sets up cascading goals to be accomplished in specific time periods, from the organizational level to the individual. The learning plan is a way to organize goals, and arrange and prioritize them based on business function.

By creating cascading goals, the organization can identify its primary objectives, then break them down into a series of smaller objectives for the organization. At the individual level, there will be very clear and concrete goals that require action by a learner, ranging from the development of a new competency or skill, to following their career-development path. Each step should be supported with resources and directions for achieving the goal. For example, to move an individual to a more senior role, the plan should outline learning that must be completed and the level of proficiency needed to achieve the new role. For an organization, the learning plan should follow the same principles but set goals at the business unit or function level. For

a new product launch, for example, a plan requires a series of learning goals to be completed by several functional areas in the company (sales, marketing, product development, customer service).

Resources can be incorporated into the learning plan by understanding what an audience needs in order to develop a competency or skill, or new initiative such as launching a product. An approach for identifying and allocating resources to support a learning plan is the 70:20:10 framework. The framework provides a way to allocate resources to ensure the right type of blended learning is provided to meet the goal.

Learning plans must be evaluated regularly to ensure their effectiveness. Whether at an individual or organizational level, tracking and monitoring progress toward meeting learning goals on a routine basis is a best practice.

A plan is optimized when it places the individual(s) at the center of the learning, creating shared ownership and accountability between them and the organization. Individual learners’ interests and goals must be balanced with those of the organization.

EVALUATE

Learning Modalities

Learning can be delivered in a multitude of ways; the challenge is picking the right ones for your organization and the manner they are deployed. The classroom has been king, but there are many other methods considered about as effective though used to a lesser degree.

Coaching, mentoring and on-the-job, experiential exercises are just as effective as classroom training, but are used less frequently than classroom training.

As we discussed earlier, understanding how people learn best is critically important. At the heart of this understanding learning modalities. Most learners learn best in a multimodal environment where the emphasis on immediacy and relevancy drives the

Figure 5: Learning Modalities: Use and Effectiveness (4-point scale)

■ Usage ■ Effectiveness



Source: Brandon Hall Group Training Benchmarking Survey

The watch point for all organizations is the bias toward leveraging familiar and comfortable modes of learning to achieve greater success with individual and organizational performance. Moving from instructor-led training and online courses is a big step for most organizations, albeit with concerns about effectiveness. Learning beyond the classroom or online course isn't the same as casual learning, which is difficult to measure. Experiential and informal learning are effective and efficient, and can be highly measurable if constructed properly.

The key to optimizing learning modalities is to understand the observable and demonstrable change in behavior the learner achieves to drive greater performance. By designing learning with the end in mind (behavior change), Learning and Development professionals can evaluate the best mix of modalities to effect this change in the learner's behavior — and make it stick.

DEVELOP

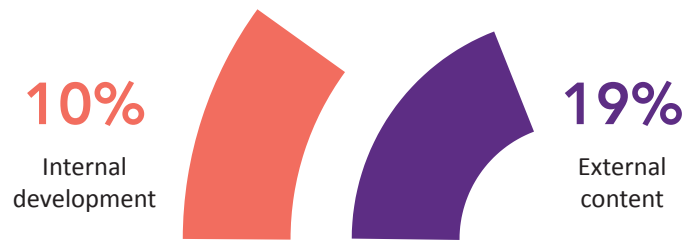
Learning Content

Creating the right content is key to executing a successful learning strategy. All the technology in the world will not help if you offer poor, outdated or irrelevant content. On average, nearly one-third of the L&D budget is dedicated to content, whether internal or external, and 31% expect the allocation for developing and acquiring content to increase.

Most companies use a blend of internal and external resources to create their content. For example, 63% of companies do most or all of their job-specific technical skills content development in house and 36% look externally for leadership-development content.

The key is to use insights gained through strategy alignment and development to inform content creation. Alignment with business outcomes and audience needs result in the best content. The type of technology that fits your strategy will also impact the content that will be created.

Figure 6: Content as a Percentage of Learning Budget



Source: Brandon Hall Group Training Benchmarking Study

If organizations are willing to assess learning modalities, they must also be ready to assess their learning content strategy. Many studies, including our own, point to the fact that the quality of the content dramatically impacts learning, regardless of delivery mode. Quality is defined here as the level of relevancy the content brings to the subject and the learner, and its appeal to the learner.

Content development is under a lot of scrutiny. The format and type of content used in today's curricula is undergoing serious evaluation in many organizations that struggle to make learning more interesting and attractive to the learner.

DESIGN

Of Learning Curricula

A curriculum organizes content and courses into logical pathways for learners based on their development needs. Again, this is greatly informed by audience assessments. Use small and reusable content segments so curricula can be quickly developed and adapted to meet the business' changing needs.

To develop a comprehensive curriculum, learning objectives and behavioral outcomes that demonstrate the content has been properly assimilated must be considered.

Curriculum design should use a matrix approach, with modalities based on the type of learner and the content. This matrix helps the design team plot the best learning trajectory and velocity to create an effective curriculum. As stated earlier, most organizations have multimodal learning audiences, so the curriculum should be built in a modular manner.

The first stage should be the learning objects used to drive the event. These learning “chunks” can be mixed and matched to produce the path that will eventually become a course or bundled content in the learning event.

From this point, learning objects must be arranged into a schema or pattern that gives designers a first view on whether or not the material is adequately covered by the content. Next, the schemas should be arranged into lesson plans. Multiple schemas or learning chains (as they are sometimes called) are woven together to produce the actual learning event or lessons. Lastly, multiple lessons are combined to create a module of learning, and multiple modules are grouped to create the learning curriculum. This modular approach allows designers to reuse and repurpose learning objects and measure their impact on learning effectiveness in a systematic approach.

In a blended learning environment with mixed modalities, the curriculum must be rooted in a framework approach, where informal and on-the-job learning follows a consistent theme beyond the originating learning event, such as a classroom lecture or online course. Frameworks also provide the learner with the opportunity to receive assistance through performance support mechanisms embedded in the curriculum that anticipate when learners may “get stuck” and have challenges in applying what they learned.

Learning must progress logically and build over time so the cognitive load does not exceed the limits of the learner. The best curricula stimulate the learner’s long-term memory through examples and trial and error opportunities so the learner can “live their learning.”

Designing the right curriculum is essential to ensuring that proper learning outcomes are met and the content is relevant and meaningful to the learning audience.

IMPLEMENT

Deploy the Learning Curriculum

If everything else has been done properly, deployment should be relatively easy. The goals are set, the content created and the technology selected. In cases of new implementations, it’s helpful to start small with pilot groups. This allows you to see what works and what doesn’t in real time without impacting the entire organization. The rollout can continue in an iterative manner as content and delivery are adjusted, as needed.

Deploying the learning curriculum should follow a framework, as discussed previously. The 70:20:10 framework and its variations provide a foundation for carrying out the curriculum in a way that is most impactful to the learning audience, and uses a sound approach to measure the effectiveness of the learning. It also provides the organization the ability to discover current and future resources needed to support the curriculum and improve it.

Deployment must be taken seriously from a change-management perspective, particularly if an organization employs new modalities or a mixed-modality environment that did not previously exist. Building a change-management model that includes a strong communication plan must also take key stakeholders in the learning audience into consideration to ensure organizational alignment with the learning strategy and risk mitigation to optimize learner adoption.

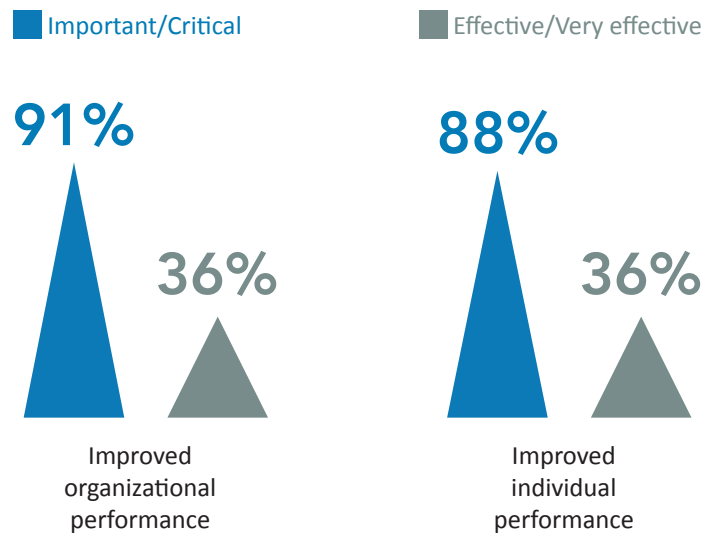
One leading practice in deploying curricula, especially with new and unfamiliar approaches, is to launch a pilot program. Pilot programs are effective for assessing a new curriculum and making changes based on feedback without engaging the entire learning audience.

In summary, deploying a learning curriculum should be handled no differently than any other launch of a new, internal organizational initiative. Executive sponsorship, a change-management plan and strong project management ensures the curriculum has a successful roll out.

There is a fundamental shift occurring for organizational learning. Learning functions are moving away from focusing on learning outcomes. New models and technologies allow learning to have a more direct impact on how employees do their jobs, the effectiveness of leaders and overall organizational performance.

This shift is evidenced by the fact that 91% of companies cite improved organizational performance as either important or critical as a learning outcome. Individual performance is right behind, cited by 88%. However, companies do not consider themselves overwhelmingly effective at making this link.

Figure 7: Importance of learning outcomes and learning link effectiveness



Source: Brandon Hall Group Learning Strategy Survey

Critical Success Levers

Of course, the learning strategy cannot succeed on its own. The following list includes many critical success factors, but not all. Your organizational culture and operating environment may dictate others, so it is important to have a strategic conversation about the influencers that have an impact on your success.

External Influencers

These may be shareholders, board members, regulatory agencies — even your competitors. All can have significant impact on your organizational success. Leveraging them or mitigating their impact is essential for your L&D framework to succeed.

Strategic Alignment

Our research makes it clear that success hinges on the proper alignment of learning, talent and the business. Having learning leaders who are business partners with the rest of the organization is key.

Stakeholder Experience

The business, learners, leaders and learning professionals are all stakeholders in L&D framework. Ensuring a positive experience when they interact with the learning function is necessary to ensure future engagement and success.

Executive Engagement

Executive buy-in is the most critical stakeholder element of the L&D Framework and often the hardest to secure. It is always wise to include a business case for learning so leaders understand the importance and impact of learning.

Talent Needs

Gaps in talent and skills often dictate the learning strategy. Rather than exclusively hiring externally, organizations can meet a wide variety of talent needs internally through learning and development. Whether it involves bringing up competency levels or up-skilling employees, learning is the first line of attack in addressing talent needs.

Relevant & Accessible

Learners increasingly expect a learning experience that speaks directly to their needs, skills, strengths and interests. There is no one-size-fits-all solution for learning. Relevancy and context make learning effective.

Part of what makes learning agile and contextual is the ability for learners to access it on their own terms. This means embracing concepts like The Cloud, which takes learning out of its black box and makes it available anywhere and mobile, and puts learning literally into learners' hands.

Global & Agile

Even small organizations can operate globally. Delivering learning to different regions presents many challenges. It is critical to determine the point at which your learning strategy shifts from global to local to meet these needs.

The move from classroom learning enables organizations to become more nimble. This is necessary to meet the needs of an agile business. New technologies and approaches to content help companies deliver flexible learning.

Scalable

What works today may not work tomorrow, especially as the company grows. Expanding the business is a chief objective of any organization, and learning must meet the needs of current and future learners.

Multi-Modal (Social, Games, Videos etc.)

Today's learning environment requires more than one form of delivery. Pure classroom learning is not enough. The multi-generational workforce and new technologies mean organizations must be ready to delivery learning across multiple platforms and devices.

Mobile

Learners expect accessibility to learning tools on their devices with an experience comparable to those of other mobile apps and websites outside the learning environment.



Conclusion

This framework was established through Brandon Hall Group's extensive research that includes practitioner surveys, expert interviews and case-study reviews, with a focus on high performance. It is meant to provide an organization with an architecture for building and executing their own learning strategy. Because of the influence of the pieces in the contextual framework surrounding the learning model, no two organizations will have the same strategy and approach. Instead of adopting a generic strategy and forcing it to work, a learning strategy shaped by specific organizational goals with an understanding of the learning audience will be far more effective and easier to deploy.

About Brandon Hall Group

Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management.

With more than 10,000 clients globally and almost 25 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.



Authors And Contributors

David Wentworth (david.wentworth@brandonhall.com) wrote this report. He is Principal Learning Analyst at Brandon Hall Group, focusing on all aspects of learning and the technology that supports it. David has been in the human capital field since 2005 and joined Brandon Hall Group as senior learning analyst in early 2012.

Richard Pachter (richard.pachter@brandonhall.com) edited this report. He is the Content Manager at Brandon Hall Group and is responsible for editing all types of content related to research. He has experience as a journalist, copywriter, editor, marketer, blogger, and social media marketing manager.