SOCRATIC ARTS

LEARNING,
TRANSFORMED

HOW A YEAR⁺ OF CRISIS IS RESHAPING THE CULTURE OF LEARNING

Socratic Arts, September 2021

THE COVID-19 CRISIS UPENDED LEARNING AND DEVELOPMENT MODELS IN THE BLINK OF AN EYE, LEAVING LEARNING INDUSTRY LEADERS RACING TO ADAPT.

To serve the needs of a newly virtual workforce, learning experts worked tirelessly to convert live programs to virtual ones and to expand or roll out new digital offerings.

Faced with unprecedented challenges, learning leaders like you accomplished the impossible over the last year and a half:

- ✓ **Provided real-time crisis change management**
  You facilitated continued learning across a remote work environment of unparalleled complexity and reach.

- ✓ **Fast-tracked learning virtualization**
  You harnessed new and emerging tools and modalities to convert crucial live trainings into effective virtual courses.

- ✓ **Created more adaptive, digitally-robust learning programs**
  You embraced digital learning modalities to deliver better, more impactful on-demand learning.

- ✓ **Adopted an agile, future-focused mindset**
  You rapidly adapted to a series of new challenges and leveraged opportunities to add value whenever possible.

Thanks to you, the learning industry has emerged stronger and more resilient than ever before. As learning experts adapted to the demands of the virtual environment, these programs continued to evolve and scale, with learners more engaged than we thought possible.

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CHARTING A
NEW COURSE

HEADING INTO 2022, LEARNING PROFESSIONALS ARE SCANNING THE HORIZON FOR WHAT COMES NEXT AND TRYING TO DETERMINE THE BEST PATH FORWARD.

We are taking stock of lessons learned since March 2020, looking for ways to maximize the access, adaptability, and impact of virtual and digital learning, and considering safe and effective ways to reintroduce in-person learning.

Charting a new course can be as challenging as it is exciting. When the landscape is still shifting under your feet, clear answers are hard to come by.

At times like these, we can all benefit from the strategic insights and experience of our peers, which is why Socratic Arts asked you—our clients—to share yours.

You comprise the very best in Learning & Development. This document is a compilation of your reflections on a challenging year and expectations about the future of learning, layered with our own.

The goal of this report is not to provide definitive findings or airtight conclusions, but to capture the best insights and intelligence available as we all move into the next generation of learning together.

ADAPTING IN ADVERSITY

"Early on, we identified a common set of problems and worked to quickly deliver solutions to those problems. I was surprised at how open and receptive people were to virtual learning. Learners came in droves and were super grateful."

- Socratic Arts client*
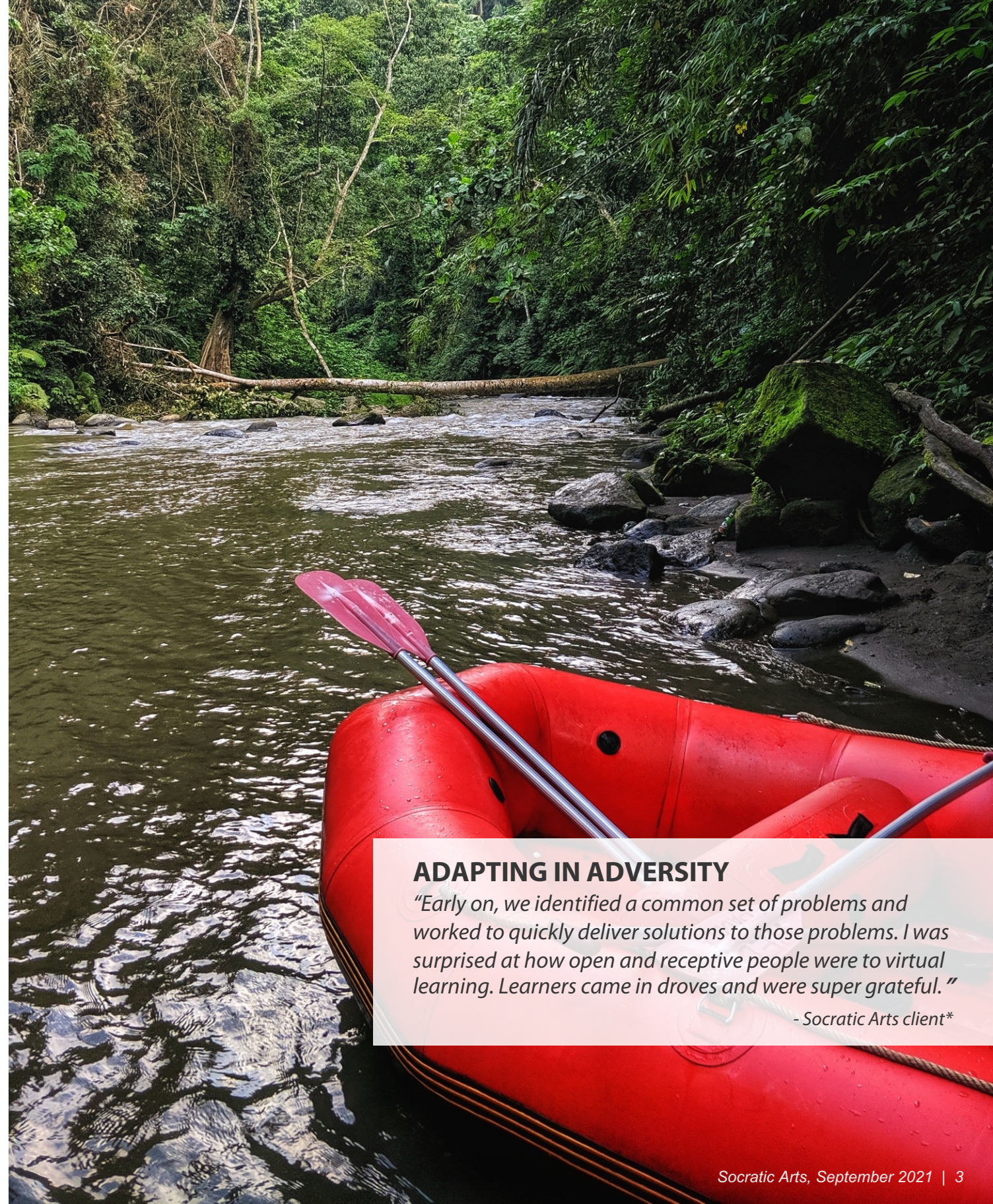
THE YEAR+ OF THE VILT

VILT SUCCESSES

" *We experienced a trend of people showing up to virtual learning who wouldn't have shown up to in-person learning for a variety of reasons. Too busy, travel time too long, a family situation they don't want to leave. This was the case for women especially. They say 'I'd have never gone before, but now I can get on my computer and have a rich conversation with my fellow colleagues. I feel like I connected with people, and I didn't have to leave home.'*

Role plays work great online – I can hear better. Others turn off their cameras, no AC to compete with in the room from a volume standpoint. The observers can see role players' faces close up – see expressions. 'You looked really scared that whole conversation!' People listen and furrow their brow – why were you angry?

One interesting thing about virtual learning is that you can space things out. What was a 3-day program became a 6-week program that meets once per week. That type of learning better represents reality, because you learn over time—we're very interested in learning in the flow of work. Virtual learning works better for that. "

THE YEAR⁺ OF THE VILT

WAS SURPRISINGLY SUCCESSFUL

FOR MANY ORGANIZATIONS, THE SUDDEN TRANSITION TO FORCED REMOTE WORK DISRUPTED EVERYTHING ABOUT THEIR DAY-TO-DAY WORK AND CULTURE.

Learning professionals faced the particularly daunting challenge of rapidly adapting countless hours' worth of in-person content to virtual formats. While many approached this challenge with trepidation over what would be lost in translation—and skepticism over whether the "Year of the vILT" could really fulfill the learning needs of their people—we ultimately discovered several surprising benefits.

You reported that virtualization helped to:

- Drive global connectedness by enhancing the links between offices around the world
- Facilitate rapid upskilling by supporting the creation and curation of more tailored learning
- Put a human face on leadership at a critical time (virtual townhalls, video messages)
- Improve access to experts, both internal and external (webinars, virtual consultations)
- Boost voluntary participation among distinct groups of learners

Groups you said benefited from virtual learning

INTROVERTS

LEADERSHIP

THE TIME STARVED
(E.G., WOMEN, BILLABLE STAFF)

We asked
"What excites you about virtual learning?"

Inviting for all
"People who aren't comfortable speaking up in an in-person classroom find a voice through the chat feature, while extroverts can still speak out loud."

Improved efficiency, affordability & sustainability
"Cost savings, lower carbon footprint, and a broader reach."

Improved access to experts
"We were able to bring the best experts to meetings–beam them in via Zoom. One UK partner said, 'I don't ever want to get on a plane and fly across the ocean to go to a proposal meeting for 24 hours.'"

Improved attendance
"Virtual means less time traveling away from home and family."

Accelerated globalization
"Company-wide and global connectivity drove a globalization of the firm and training, while also emphasizing that you need the local flavor."

Better leadership engagement
"We found senior leaders are more likely to engage virtually because it's less of a time commitment. You can also launch virtual learning on more topics far more quickly."

VILT STRUGGLES

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I had to deliver some virtual programs (that were previously in-person) for executive leaders, and it was harder to get the engagement from the group. You really need some artful instructional design to get people engaged, and you need an even more masterful facilitator in a virtual environment.

Virtual learning makes it a lot easier for people to cancel. It's not like canceling a plane ticket. We see a lot more attrition. More last-minute faculty cancellation, too. Virtual learning doesn't feel like a big deal like an in-person program does.

When everyone is working from home, learning can feel like the last thing on their lists. People are sitting at their laptop all day anyway, so taking a virtual course is not top of mind. Zoom fatigue is real. Our ratings of virtual courses do not come close to what we get at in-person programs.

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WE LEARNED A LOT ABOUT
HOW TO DELIVER GREAT VIRTUAL LEARNING

THE "YEAR OF THE VILT" LED US TO ANOTHER DISCOVERY— DELIVERING GREAT VIRTUAL LEARNING IS TOUGHER THAN IT LOOKS AND TAKES TIME AND PRACTICE TO DO WELL.

From Socratic Arts' clients

"When we converted big programs to virtual, we discovered that it works a lot better when it's spread out over time. A program that might have been concentrated over to 2-3 days works much better over 6 weeks."

"You can't just drop the PowerPoint into the course and go on as you would in-person. You must redesign. That's what we've been doing for 13 months."

"The courses can't be too long, and they need a lot of breakouts or people multi-task. Courses that were more conversational than passive were more successful."

"I'm a huge proponent of individualized, on-demand, but it doesn't go well. Until we have the tech know-how – let's do vILT."

Here are some of the biggest pain points you reported:

Zoom fatigue
Learners grew increasingly tired of virtual meetings and being on-camera, especially as the pandemic wore on.

Multi-tasking epidemic
Learners quickly learned it was easier to multi-task during virtual trainings.

Engagement drop
There was often an initial spike in participation, followed by a noticeable drop.

Shorter duration of sessions
vILTs required shorter runtimes than in-person sessions, which led to tough decisions about what to cut.

Technology frustrations
Learning teams were forced to adapt programs to technology with limited features and functionality, which required new staffing needs (Zoom producers) to deliver.

A lack of great facilitators
Facilitating a vILT requires different approaches than an in-person classroom.

Local disconnection
Less time for in-person training, especially in local offices (and more time in Zoom) resulted in fewer interpersonal moments of connection. Coaching, mentoring, and building relationships all suffered.

Depleted design resources
Learning teams were stretched thin and could not give every virtual offering the thoughtful design it needed.

Lack of other options
In some cases, learning teams developed a lot of content as vILT because they found digital on-demand options to be limiting. With on-demand, it's hard to enable robust, generative, open-ended work, which the real-world requires.

WHAT LEARNERS WANT

CRISIS HAS GIVEN US MORE CLARITY
ABOUT WHAT LEARNERS WANT

AFTER MORE THAN A YEAR OF REMOTE WORK AND NEW LEARNING EXPERIENCES, THE EXPECTATIONS AND NEEDS OF LEARNERS HAVE SHIFTED - PERHAPS PERMANENTLY.

Expectations about the content, accessibility, and value of learning have shifted. Learning experts tasked with meeting those expectations face a critical question—what now? What exactly is it our learners need and want, now and in the future?

Here is what you had to say about that question—your responses paint an exciting (and complex) picture of what the future might hold:

Curated, blended learning pathways

Curated and blended content were big themes. Many are using Learning Experience Platforms (LXPs) to create curated content channels tailored to specific skills or roles, but you aren't yet satisfied with the individual customization functionality. You're excited about blended experiences – using multiple modalities to engage learners in a variety of ways.

"Learning will be like a YouTube channel. Think knowledge distribution channels where the content is higher quality and better curated."

"We need to combine synchronous and asynchronous learning in a way that builds up to an exciting experience."

Microlearning

Microlearning has been a buzzword for a while – but time out of the office has increased the demand for it. Now that learners aren't attending in-person events as often, there is a stronger desire for bite-sized learning that fits into the flow of work.

"The future of learning should be more and more about the moment of need—more micro. We need to build a culture where you own your career."

Lifelong learning

The enforced pause of the pandemic has made many reflect on their career goals and where they want to grow. This has resulted in an increased demand for upskilling and learning.

"There is increased focus on learning in times of change and uncertainty. Worldwide, there's a growing recognition that people need to make learning a lifetime choice."

Rapid upskilling

More hires are internal hires, which means you're looking to upskill people on the fly as they transition between roles or types of projects. The rate of change continues to accelerate so keeping a nimble, adaptive workforce is a high priority.

"We're looking to our people to drive our strategy, so we've doubled down on mapping capabilities to job roles. Now we need to focus on how to best upskill them to meet the organization's aspirations."

Diversity & inclusion in the digital sphere

No matter what modality you're using for training – virtual, in-person, digital on-demand – diversity & inclusion continues to be an important focus. Some of you were grappling with how to deliver it effectively in a virtual landscape.

"We have really been looking at inclusion. What does this mean in terms of skill building? What does inclusive leadership look like? How can learning help drive inclusive/racial justice efforts?"

Adaptive learning

Many of you spoke about the dream of individualized, adaptive, on-demand learning – and the need for smart assessments to help you provide learning that is truly tailored to learners' individual needs.

"We need effective assessments, learning portals, and content to enable tailored learning paths."

"There's been more of a push for customization at an individual level—which is really hard to do at scale."

Strategic in-person events and courses

You're still enthusiastic about the value of in-person events – you just want to be more strategic about when in-person is the right choice. Many of you spoke of benefits such as relationship building and developing a strong firm culture and identity happening best in-person.

"In-person training is still important to finding your tribe, which is critical for success at the firm."

"How can learning support culture? When we can come back together, how can learning help people feel connected to this huge organization that keeps growing?"

THE FUTURE OF LEARNING

FORECASTING THE FUTURE

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The future of learning is going to be increasingly at the moment of need. More personalized. More micro. More choice. There are so many skill levels in today's practitioners, you've got to have choice, you've got to have flexibility between synchronous and asynchronous. You need to let them own their own journey.

As we think about investing in different technologies to drive learning, the big fundamental question is still: how does the investment really get to behavior change? That's the ultimate challenge. I'm fascinated by the concept of nudges to drive behavior change. What could those nudges look like to put things top of mind for our people?

We're just starting to broach the concepts of the culture of learning and learning in the flow of work. I think there's a lot of untapped potential in peer-to-peer learning and the theory of curation. If you're reading a cool HBR article, for example, how do you share that with peers?

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ENTERING A NEW ERA OF AGILE, DIGITALLY-ENHANCED, BLENDED LEARNING

We believe blended learning is the future. That future includes a mix of longer, blended learning journeys along with shorter experiences such as vILT workshops and engaging, digital on-demand experiences. Next generation blended learning journeys will feature a mix of mediums and learning modalities carefully calibrated for maximum impact and effectiveness. The success of these programs will hinge on landing on the right balance for your company—one that reflects its unique culture, workflow, business drivers, and digital infrastructure.

Here's what we think learning will look like in the near term, based on our research and your combined insights:

Multi-modal
Learning journeys will deploy a blend of virtual (synchronous and asynchronous) and in-person courses calibrated to maximize impact and engagement.

Personalized
When and where possible, blended learning journeys will be tailored to support the unique needs of each learner.

Tech-enabled for higher engagement
Whether it's automatically sending an email prompting someone to take a new course or providing a more immersive, interactive multimedia experience, learning will be designed to promote higher engagement and better retention.

Available on-demand and in the flow of work
Targeted "microlearning" modules will be accessible on demand via curation platforms (LXPs) on mobile and desktop devices to enable people to fit learning into the flow of work and life.

Data-driven and adaptive
Using a combination of curation platforms (LXPs), performance tracking, and machine learning, individualized learning programs will evolve with the learner.

Long (and changing) horizon
Learning will be designed to address the flexible, evolving skill set one needs to acquire over the span of their career, enabling employees and their organizations to stay ahead of the change curve.

AN AGE OF ACCELERATED CHANGE

"Covid shows how quickly things can change, and thus how quickly a workforce needs to change/adapt. This makes learning even more crucial."

- Socratic Arts client*

IN-PERSON OR VIRTUAL?

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One thing that in-person does well is help you find your community. It's so important to find the people with whom you connect. Many do not have a consistent team, so in-person learning is one way to find your anchor. You can't be successful on your own. In-person learning is culturally significant.

You need to have a valid reason to make learning in-person—it's less about teaching than about being in a cohort and having an awesome experience and working on a solution together. We're looking at some of our longer in-person programs to see if we can combine synchronous and asynchronous learning in a way that gets you excited for an awesome 1- or 2-day in-person experience instead of the whole week.

The first question we ask when deciding whether to go in-person or virtual is: is culture-building a primary objective? If it is, then it should probably be in-person. The second question is: is there a lot of practice? If there is a lot of active practice, do you need someone looking over your shoulder while you practice?

"

LEADERS FACE A TOUGH DECISION:
IN-PERSON OR VIRTUAL?

SHOULD IT STAY VIRTUAL OR GO IN-PERSON?

Consider IN-PERSON if an activity/course meets enough of the following criteria:

- It provides unique opportunities for cultural immersion, team building, networking and/or mentoring
- Learning is significantly enhanced by group exercises and hands-on help
- It's celebratory and/or needs supervised skills practice
- It occurs relatively infrequently (1-2 x per year)
- It drives critical decisions about business strategy or organizational management
- It provides a space for important collaboration, ideation, and innovation
- The value of in-person instruction outweighs the expense, inconvenience, and personal safety risks
- It can be hosted for small groups at local offices

Consider VIRTUAL or MIXED if an activity/course meets enough of the following criteria:

- Its success does not hinge on cultural immersion or spontaneous interaction with colleagues
- It can reach more people effectively than an in-person solution
- It can be delivered by a skilled virtual facilitator
- Skills practice can take place in team breakouts / the goal is primarily knowledge or information transfer
- It must be held frequently for large groups
- It doesn't require critical consensus building or decision-making
- The value of in-person instruction is difficult or impossible to quantify
- It cannot be supported by local offices

NIMBLER, MORE CONVENIENT, AND MORE COST EFFECTIVE, YOU ALL CONCUR THAT VIRTUAL LEARNING IS HERE TO STAY.

At the same time, many of you reported that there is simply no substitute for in-person instruction when it comes to activities such as collaboration, celebration, and social bonding. Moreover, after months of working online in isolation many people are clamoring to get back in the classroom. An option some organizations are exploring is virtually connecting multiple local classrooms for parts of their programs.

To the right are some factors to consider when trying to decide whether learning should be delivered in-person or virtually:

WHY YOU THINK VIRTUAL LEARNING IS HERE TO STAY

1. More cost effective
2. More flexible and convenient
3. Helps lower your carbon footprint
4. Reduces health safety risks

THE RIGHT TOOLS FOR A TOUGH JOB

ASSESSING THE LEARNING TECH LANDSCAPE

YOU'VE BEEN PATCHING TOGETHER A LOT OF DIFFERENT TECH TOOLS TO DELIVER AND ENHANCE LEARNING OVER THE LAST YEAR

Virtual services and technologies have proliferated over the course of the pandemic. You'd love to have tools that not only provide a great experience for your learners, but also reduce headaches for you as learning professionals. How can you be sure you're leveraging the right tools for your learning needs?

There's no magic bullet. There is not one piece of technology that will provide the perfect blended learning journey or create the best digital on-demand experience. To be successful, learning programs must be tailored to fit each firm's unique people, culture, workflow, and business drivers, and be easily integrated into your firm's existing tech infrastructure. Consequently, the right combination of tools will look different for everyone.

CLASSES OF TOOLS YOU'LL WANT TO CONSIDER INCLUDING:

- **LMSs** – For housing content (most of your organizations already have one)
- **LXPs** – For curating content and learning paths, and creating a better UX for learners (some of your organizations have one)
- **Virtual conference apps** – for creating the facsimile of a live event and curating spaces to hang out, network, and mingle
- **Content authoring programs** – for creating digital, on-demand components

Even in the absence of a perfect solution, key opportunities exist for innovative features—for learners and learning teams. It's worth your time to explore offerings beyond Zoom and your LMS to get the most out of technology. On one hand, these platforms are not fully mature technologies yet. On the other hand, many LMS and LXP vendors report that their users don't understand the full feature capabilities of the software their organization has adopted. So, if you are looking for a specific new feature such as assessments, automated emails, data tracking, or similar – it's worth checking to see if your LMS or LXP already has it as part of its tool suite.

MOST WANTED FEATURES

FOR LEARNERS:

- A seamless user experience (where learners can connect to synchronous and asynchronous modules, register for in-person learning, take assessments, etc.)
- Curated, personalized content targeted to one's own proficiency level (versus that of their rank-peers)
- Assessments that allow them to "test out" of learning they don't need
- Proactive communications that keep them engaged
- Accessibility on multiple platforms (mobile and desktop)
- Ability to connect and share with other learners

FOR LEARNING TEAMS:

- Data tracking and reporting (so they take evidence-based action)
- Automated communication campaigns
- Registration management
- Ability to create engaging, customized wrappers for learning journeys

SOCRATIC ARTS'
VISION FOR THE FUTURE

WE ARE EXCITED TO EMBRACE THE EVOLVING LANDSCAPE AND COLLABORATE WITH OUR CLIENTS TO CREATE FRESH LEARNING EXPERIENCES WHILE STAYING GROUNDED IN USER-CENTERED DESIGN PRINCIPLES.

As learning becomes increasingly tech-enabled and virtual, we believe the fundamental principles of great design remain the same.

As learning experts, we all need to be flexible enough to adapt to the new demands of the changing learning landscape – while at the same time holding on to the integrity of what we know from experience to be effective.

The task at hand is the translation of tried-and-true learning techniques into fresh new forms and architectures. That way, we can meet learners where they are, even as "where they are" continues to evolve and change.

For example, learners increasingly want microlearning experiences because these are easier to integrate into the flow of work (essentially as performance support). This need makes sense!

At the same time, we all know we can't deliver on the same performance objectives in a microlearning as we can in a robust, extended, hands-on experience.

It's exceptionally hard to provide open-ended, generative skill application in an unmentored, on-demand, micro-learning solution.

Learning skills via on-demand solutions means superficial feedback on learners' work, at best, which can lead to faulty implementation on the job. This is where the efficacy of blended learning journeys comes into play.

Microlearnings work well as smaller performance-support components within a larger curated learning path. Can they do the job on their own? Of course not. But do they work well as part of a greater ecosystem of learning? Absolutely.

STAYING TRUE TO GREAT DESIGN

SOCRATIC ARTS'
CORE DESIGN PRINCIPLES

BELOW ARE CORE DESIGN PRINCIPLES FOR EFFECTIVE LEARNING EXPERIENCES, WHICH ARE FOUNDATIONAL TO OUR WORK, WHETHER IN-PERSON, VIRTUAL, OR DIGITAL ON-DEMAND.

LEARNING BY DOING

- Natural learning occurs when we learn by doing. When we learn by doing, we test our understanding and realize when we need help. That's when instruction is most effective. For this reason, practice is more effective than talking about doing a thing (and talking about doing a thing is more effective than listening about doing a thing).

- **Whenever possible, trainers should get learners practicing, and having them explain their understanding, rather than lecturing to them.**

RELEVANT, AUTHENTIC CONTEXTS (SCENARIO-CENTERED LEARNING)

- Authentic, relevant, scenario-centered learning experiences are highly effective. Research on memory shows the more similar the learning context is to real-world application, the more likely we will be able to retrieve what we learned when it's useful.

- **Training experiences should look a lot like on-the-job application.**

JUST-IN-TIME SUPPORT

- When we're stuck or confused, we're receptive to, and even desire, help in the form of performance support. Performance support is most effective when it's streamlined for use both during the program and later, on the job.

- **A thoughtful combination of job aids, templates, and expert tips and stories is always useful – and can be delivered in any environment.**

REFLECTION

- Reflecting on what we just did / why we did it / if it worked / where we made mistakes / how we can improve is a critical part of learning that allows us to reinforce and generalize what we've learned to help us transfer it to new contexts in the future.

- **Trainers should look for opportunities to build reflection and debriefs into every learning experience—it can be easy to overlook during the transition from live to virtual.**

FEEDBACK FROM EXPERTS

- Personalized, targeted feedback provides essential benefits: we learn what we did well and where we have gaps; we get suggestions on how to improve; we feel like what we just did matters, which can help us feel more invested. Although it's not always possible to get a live expert engaged with on-demand learning.

- **Trainers can make on-demand learning stronger by weaving expert feedback into the experience through thoughtful performance support, carefully scripted answer responses, expert stories, and expert advice.**

DESIGNING THE EXPERIENCE

HUMAN-CENTERED DESIGN STILL COMES FIRST

- New tools and modalities don't change the key principles of human-centered design.

- Consider your learners' needs first. What are the critical skills, knowledge, mindsets, and experiences they need in order to succeed?

- Next consider your business drivers, delivery requirements, and constraints. Delivery constraints sometimes push you toward virtual or digital options. Learner needs will help you decide what is most appropriate.

DESIGNING THE FULL EXPERIENCE

- For a learning experience to be effective and enjoyable, trainers need to consider more than just cognitive factors. They need to consider the whole person.

- Trainers should think about factors such as emotional tone (you need a balance of struggle and victory to feel a sense of achievement); physical stamina (Zoom fatigue is real!); the body's need to move (kinesthetic games can be more fun); the power of connection (relationship building enhances learning); and so much more.

THE JOURNEY TOWARD THE FUTURE OF LEARNING IS FAR FROM OVER.

THE LANDSCAPE WILL CONTINUE TO SHIFT AS THE WAY WE GO TO WORK (OR WORK REMOTELY) CONTINUES TO EVOLVE.

We at Socratic Arts look forward to traversing new terrain and continuing to grow and innovate alongside you and all learning experts in the field.

CONTACT US

Led by artificial intelligence expert and visionary Dr. Roger Schank, our team of experienced instructional design and facilitation experts have developed and delivered performance-improvement solutions to Fortune 500 companies, government agencies, and post-secondary schools for over three decades.

Holly Christensen Sestak
President and COO
801-633-4553
hchristensen@socraticarts.com
www.socraticarts.com

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