

Foreword

Across the world, organisations, in their response to the pandemic, shifted gears to virtual workplace models and remote working practices to enable business continuity. Increased cost-saving opportunities, improved employee productivity, and the absence of a vaccine indicate that this theme will sustain for the foreseeable future. And while the Digital India campaign had sown the seeds for a digital economy, it was COVID-19 that accelerated large-scale digital adoption and transformation, leading to an increased need for acquiring new skills. The pandemic highlighted the need to invest in digital technologies, such as video conferencing tools, cloud systems, and Learning Management Systems (LMS).

In light of ever-changing business scenarios, organisations are now increasingly looking to develop capability-building initiatives. Upskilling and lifelong learning have become imperative as emerging trends, such as Machine Learning (ML) and Artificial Intelligence (AI) continue to transform ways of working.

We believe that chief human resource officers, chief learning officers, and Learning and Development (L&D) teams have already realised that reskilling, upskilling, and out-skilling are the answers to these problems; just “learning”, as we know it, will not suffice. A learning transformation is needed—one that focuses on the connection between continuous upskilling and actual work. Organisations must now ensure that “learning” comes to the worker—where the work is actually done.

In our quest to understand if the current scenario has accelerated mindset shifts in L&D organisations in India, we collaborated with NHRD to co-author this report. Our methodology was the combination of a survey and virtual one-on-one conversations with the leaders of 45 reputed Indian organisations, based on which, we identified six key learnings that are transforming the Indian L&D landscape.

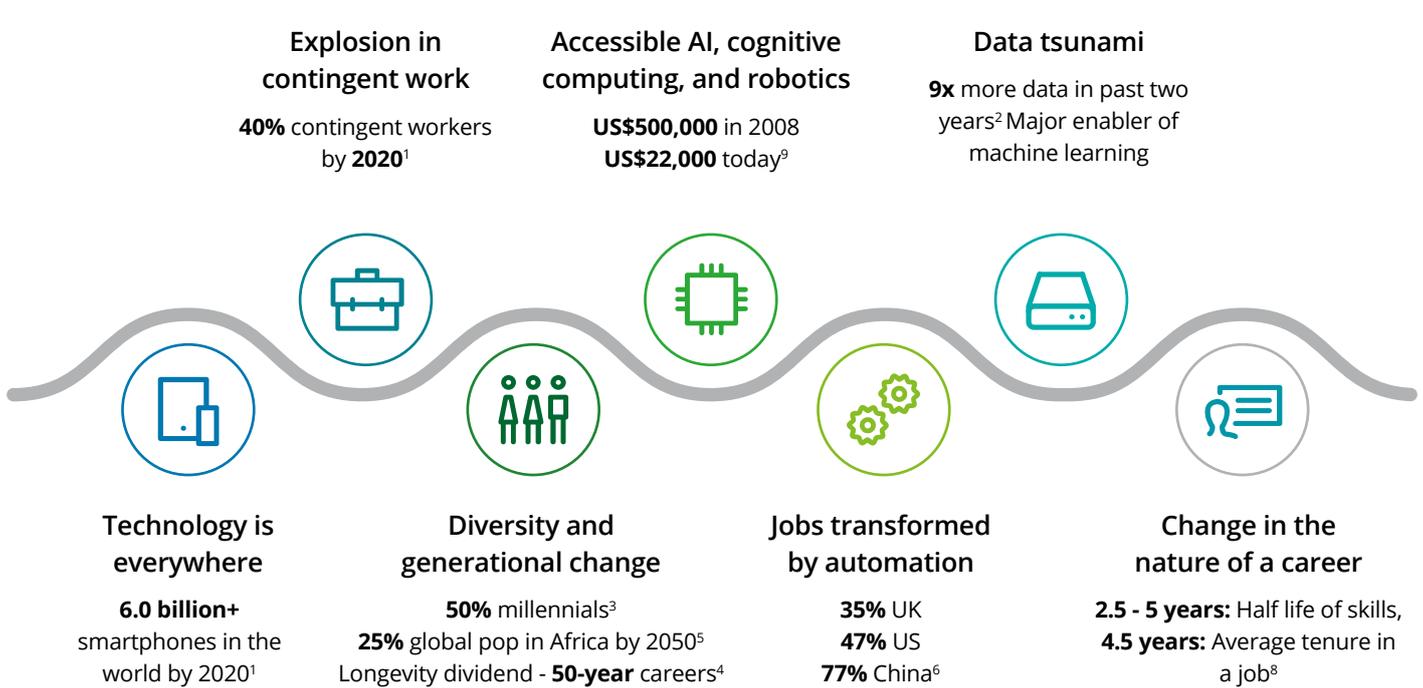
We have presented the tactical steps that could be adopted by organisations to restructure their learning strategy and augment their existing workforce with resilience and tenacity.



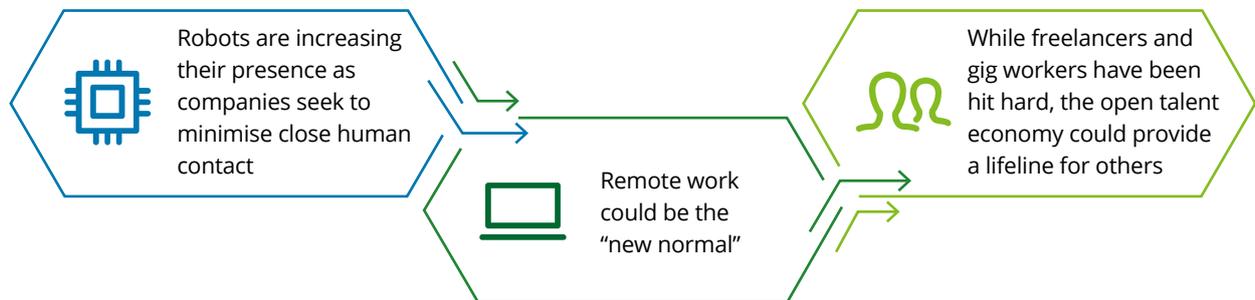
The “new normal”

The future of work is driven by the confluence of technology and people-related disruptions, and further accelerated by COVID-19. This is challenging leaders across fronts and forcing them to reimagine learning.

Seven disruptors



COVID-19 accelerators



¹ <http://news.ihsmarket.com/press-release/technology/more-six-billion-smartphones-2020-ihs-markit-says>

² <https://www-01.ibm.com/software/data/bigdata/what-is-big-data.html>

³ Annual Global Millennial Study, <https://www2.Deloitte.com/uk/en/pages/about-Deloitte-uk/articles/millennial-survey.html>

⁴ <https://www.newscientist.com/article/mg23130810-800-the-100year-life-how-should-we-fund-our-lengthening-lives/>

⁵ https://www2.deloitte.com/content/dam/Deloitte/il/Documents/human-capital/Thriving_in_times_of_digital_disruption.pdf

⁶ http://www.oxfordmartin.ox.ac.uk/downloads/reports/Citi_GPS_Technology_Work_2.pdf

⁷ Intuit 2020 Report: Twenty Trends that will Shape the next Decade https://http-download.intuit.com/http.intuit/CMO/intuit/futureofsmallbusiness/intuit_2020_report.pdf

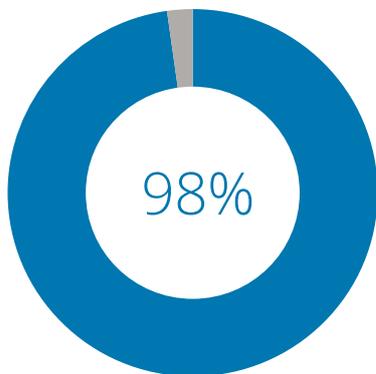
⁸ <https://www2.deloitte.com/content/dam/Deloitte/global/Documents/HumanCapital/dttl-hc-english-opentalenteeconomy.pdf>

⁹ https://www2.deloitte.com/content/dam/Deloitte/be/Documents/tax/Finance_forum/7%20Tech%20Trends%20-%20Charles%20Palmieri%20and%20Nathalie%20Vandekerhove.pdf

A paradigm shift in the learning landscape

HR leaders that we interacted with felt that the learning landscape transformed dramatically in the “new normal”

How learning evolved for virtual...



When asked if organisations utilised virtual learning during the pandemic, the answer was a **resounding "yes"**

How learning teams adapted...

- 80% focused on creating and communicating detailed learning-related material.
- 68% borrowed talent from the business to support learning activities.
- 66% leveraged existing virtual assistant technology.

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

HR leaders speak



Virtual learning got a **tremendous boost** with annual man day targets being met twice over in three months



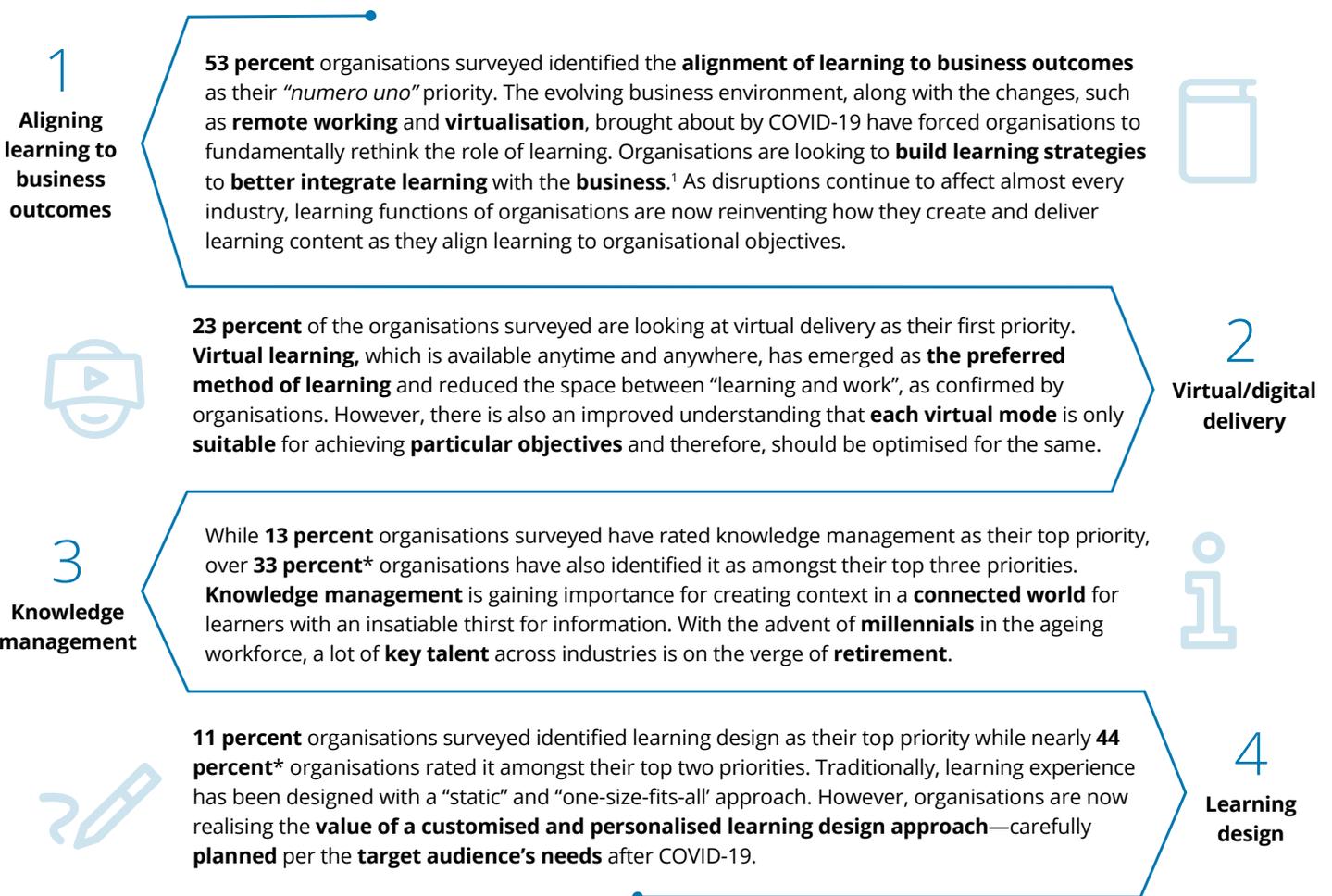
Classroom training sessions were **repurposed and redesigned** for virtual training using self-paced tools such as Webex, Skype, and Adobe Connect.



We went **all digital** and used the LMS to its full potential during the lockdown.



Insight 1 | Learning strategy and business models need increased interlinking



Source: 1 – Deloitte Insights Superlearning: Reskilling, upskilling and outskilling for a future-proof workforce
* Refer Chart 3 in Appendix 1 for further details

Learning in the flow of work

New approaches to integrate learning and work are arising—combining development and work into “dev-work”, building on the realisation that learning and work are two constantly connected sides of every “job”.

– Global Human Capital Trends, Deloitte

Learning strategy, the **most important pillar** for organisations today, requires an overhaul. Nearly **50 percent** organisations plan to prioritise learning strategy to keep up with the changing environment and preferences of modern learners. Developing a **culture of continuous learning** in an environment that **embeds upskilling into the flow of work** is vital. A renewed learning strategy will not only make learning a part of the organisation’s mission but also **add value for its employees**.

Insight 2 | Virtual is here to stay: Providing experiences is key

1

As expected, most organisations utilised virtual learning during the pandemic. And, **we believe virtual learning is here to stay.** Organisations confirmed that virtual learning will constitute at least **40 percent** of the formal learning structure, with some organisations expecting this figure to reach as high as **90 percent.**

While virtual has become the new normal, it is crucial to ensure learning is interactive given today's digital learner's jobs, behaviours, habits, and preferences. About **62 percent leaders conveyed that the focus of L&D teams has shifted towards making content "more-interactive" using facilitator-led live instructional trainings, simulations, and panel discussions** over conventional modes.

2

Priority	Percentage	Description
Experience	55%	Special work projects, stretch assignments, any time work is developmental
Environment	25%	Resources, physical, and virtual spaces workers inhabit
Exposure	14%	Interactions with people and groups both formal and informal
Education	9%	Classroom, self-paced learning

Source: Placing Meaningful Tools and Information in the Flow of Work, 2019

With Future of Work conversations becoming prevalent, we have been witnessing a move towards continuous learning mechanisms that are beyond formal education and encompass **experience, environment, and exposure.** Organisations have made their preference clear where **providing experiences that augment work trumps formal classroom-based learning.**

3

62% Experiential modes of learning

- VILTs¹⁰
- Simulations
- Gamified learning
- Podcasts
- Panel discussions
- MOOCs¹¹

38% Conventional modes of learning

- Pre-recorded e-learning
- File sharing
- Physical assets
- Classroom sessions

Increased investment in experiential modes of learning in comparison to conventional ones

Case in point: A Fortune 500 organisation—an oil and gas major
 The company's **cloud-based virtual interactive learning platform** has, in this year alone, gathered widespread adoption **and** more than a **300 percent increase in course completions.** It houses **500 hours of e-learning content** based on an organisation-wide technical competency framework and caters to the learning needs of its **17,000+ workforce.** In the wake of the COVID-19-induced lockdown, the new LMS has become the de-facto **mode of learning delivery,** which includes **simulations and gamification.**



Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

¹⁰ Virtual Instructor Led Training ¹¹ Massive Open Online Courses

Insight 3 | Even with learning budget cuts, organisations are prioritising and spending on integrated technologies

Nearly **half** of the respondents witnessed budget cuts. **Three out of every four** organisations surveyed had their budgets curtailed by **more than 20 percent**.

89 percent organisations prioritised adoption over investment
Organisations are looking at making their existing platforms **more robust** and **increasing user adoption along with learning time spent**.

More than 60 percent organisations saw adoption increase to more than 1.2x
The adoption was driven by using techniques such as converting physical training to **virtual, sharing learning material, working with business teams to support learning** to name a few.

With budgets curtailed, organisations are prioritising investment in a variety of technologies

Learning today

..to..

Learning tomorrow



LMS

Many organisations have used LMS as a “course catalogue” in their formal education system. About **73 percent** respondents claimed that they already **leverage the power of learning management systems** in their organisations.



Internal shared drive

It has been used previously in organisations for internal communication and information sharing. More than **84 percent** organisations reported to have used **MS teams, OneDrive, and SharePoint** extensively for internal communication.



Content library/programme delivery platforms

Content libraries have been used by organisations that prefer ready-made/ sourced content. Platforms such as EdX and Coursera have witnessed a sudden jump in popularity in previous years to date and are being used by **60 percent** organisations.



Micro-learning

Bite-sized learning traditionally allows learning organisations to launch content quickly and enable learning in the flow of work. However, they are in their nascent stages and are being explored further.

LMS

Organisations are interested in investing in their existing platforms given the value that a cohesive LMS system can provide. We saw **47 percent** organisations interested in **strengthening their LMS** by integrating them with other systems and processes.

Highly contextualised content library

As vendors/content platforms are increasingly providing ‘**customised- Netflix style**’ libraries, organisations are readily using and investing in these platforms. About **44 percent** respondents want to invest in them in the near future.



Internal knowledge management system

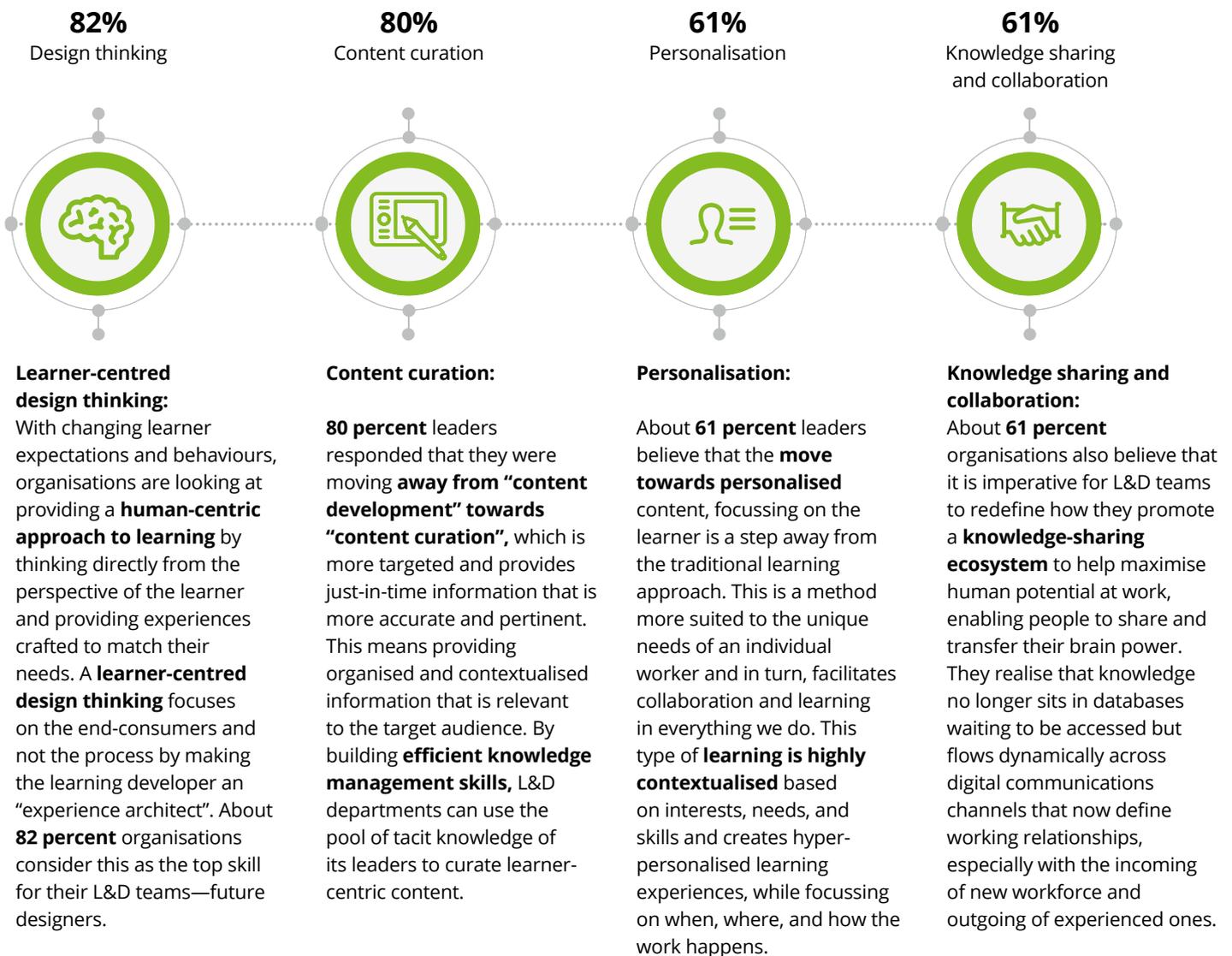
Organisations are planning to invest in **27 percent** of the organisations surveyed expressed interest to invest further in shared drives to further strengthen their knowledge management infrastructure.

Anytime-anywhere learning

With the increasing use of smartphones and tablets, **30 percent** organisations are moving towards providing information and learning that is available to employees where work happens.

Insight 4 | Design thinking and content curation: Skills that L&D teams cannot do without

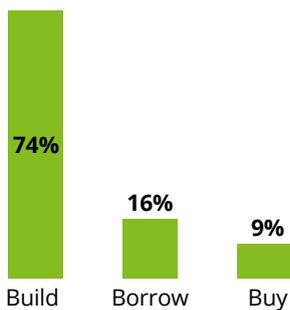
Top skills for L&D in the future



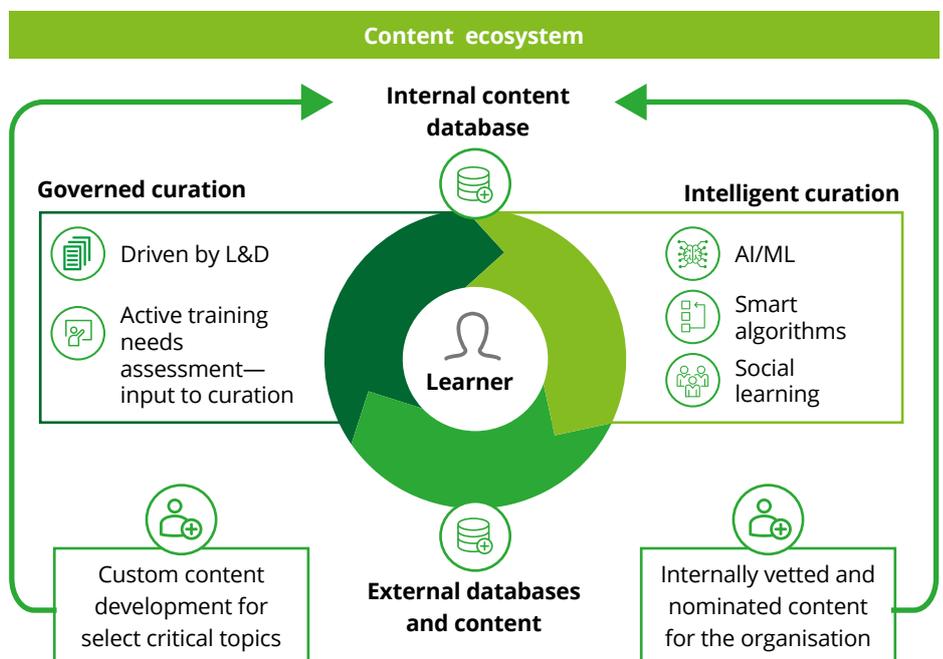
Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

Insight 5 | Organisations are transitioning from buying content to curating personalised and contextualised content

We asked organisations about their approach towards providing the right content and the majority wanted to “**build**” rather than buy or borrow

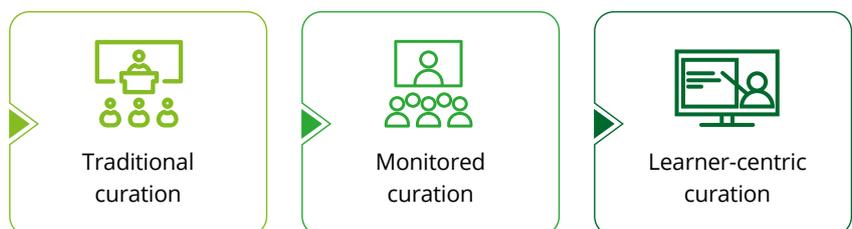


- Almost **74 percent** organisations **do not want to buy content anymore**, but are focussing on curating personalised learner-centric content through their L&D teams.
- Organisations are focussing on developing content curation capabilities internally and reducing dependencies on external vendors. About **80 percent** organisations want to **build “content curation” as a key capability** within their L&D teams in the future.
- As nearly **50 percent** respondents have witnessed budget cuts, creating content inhouse will help organisations **optimise their learning budgets, reduce the turnaround time, and provide customised content for modern learners.**



Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

With an emphasis on reducing learning budgets, organisations are choosing a **new hybrid model**, encompassing features of both “content creation” and “content curation”. Also, L&D teams are now building capabilities to curate learner-centric programmes internally. This will lead to further contextualisation of curated L&D programmes and bridge the gap between formal and informal learning.



Insight 6 | The new mandate of L&D: Build a resilient, emotionally intelligent, and empathetic workforce

Top-rated human capabilities



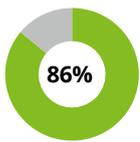
Resilience

Leaders considered “resilience” as the capability that the world in the “new normal” can not do without. Resilience is the ability to “bounce back” after adversity. According to **93 percent** leaders, it is an emotional muscle that must be strengthened not only amongst leaders, but also amongst the workforce to ensure that future crises can be dealt with more strongly.



Emotional intelligence

According to **91 percent** surveyed leaders, **emotional intelligence or EQ is critical in the times of a crises**. In the face of uncertain challenges and risks, leaders recognise the need for expressing compassion and empathy. EQ enables leaders to acknowledge employees’ priorities, and safeguard their health and safety.



Empathy

As organisations are moving towards human-centred learning approaches, they are realising the **importance of “empathy” as a crucial capability**. According to **86 percent** leaders, acts of empathy can provide insights into the feelings and needs of others, thus building and sustaining positive workplace relationships, co-operation, and collaboration.

Other highly rated capabilities



Adaptive thinking



Social intelligence



Critical thinking



Creativity



Teaming

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

As organisations continue to navigate through uncertainties, they are recognising the need to **embrace and cultivate enduring human capabilities** in their workforce to drive business performance.

Along with rapidly **building new skills**, the new mandate of L&D is to build a workforce that can **bounce back, express compassion, and promote positive relationships**.

It is no surprise that more than **80 percent** surveyed organisations are looking at building **design thinking** capabilities within their L&D teams, placing the employee at the centre, and focussing on providing experiences that go beyond their technical skills.



Way forward

Action steps to create a resilient, future-proof L&D organisation



Craft the learning strategy in alignment with the business strategy without losing sight of the employee experience.



Relook at the **learning operating model** for a transition towards an **agile, digital-driven business model** and remote modern learners or gig workers that might be on the organisation's roll.



Shift your focus from producing learning content to **enabling organic learning in the flow of work**. Take learning to where work happens by concentrating on providing experiences that augment an employee's work.



Optimise costs, remove redundancies, and unearth savings to self-fund L&D by assessing spends on curriculum, technology, and vendors.



As virtual is here to stay, build content and delivery mechanisms that cater to this new normal by **utilising technology** and **experiential modes of learning**, including gamified learning. Also, use internal subject-matter expertise, contextualised content libraries, and user- and AI-driven curation to provide the right content for fast-moving skills.



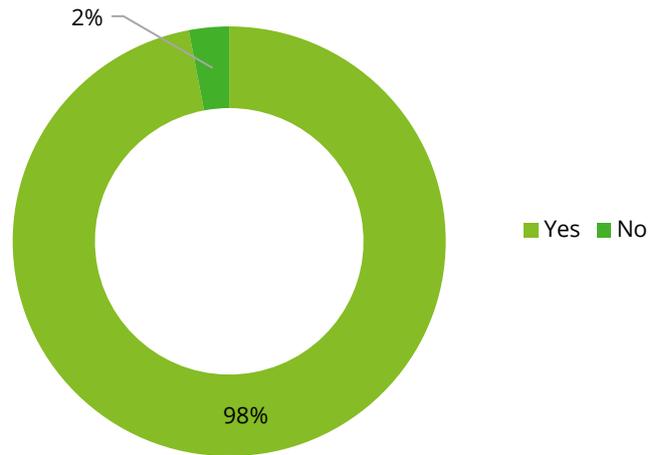
Focus on **maximising adoption** through communication, leadership messaging, and smart change management.



For L&D to start speaking the language of the business, **upskill on business partnering, design thinking, technology**, and most importantly, **human-centred skills**.

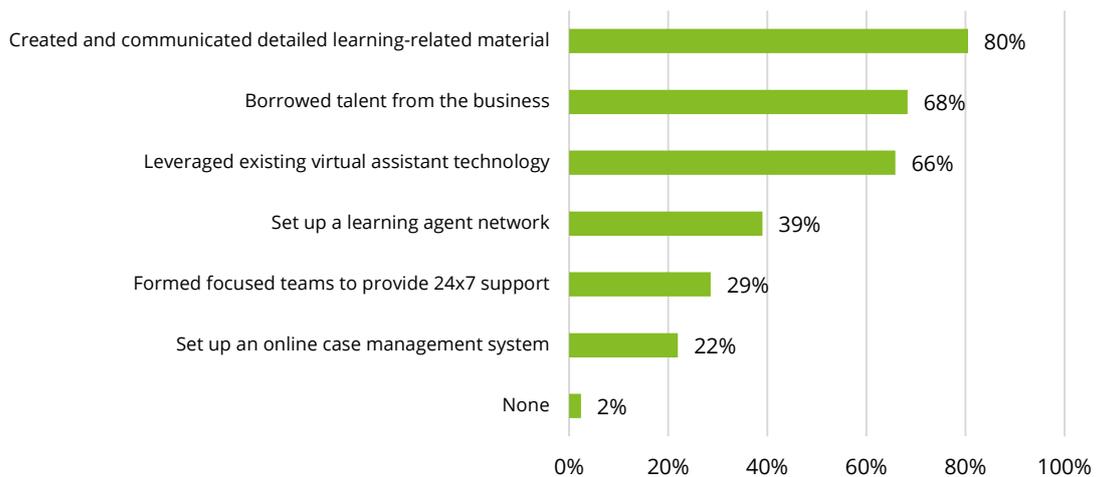
Appendix

1. Has your organisation leveraged COVID-19 to boost virtual learning?



Insight An overwhelming majority of organisations have stated how the COVID-19 pandemic has been leveraged to develop virtual learning systems for employees.

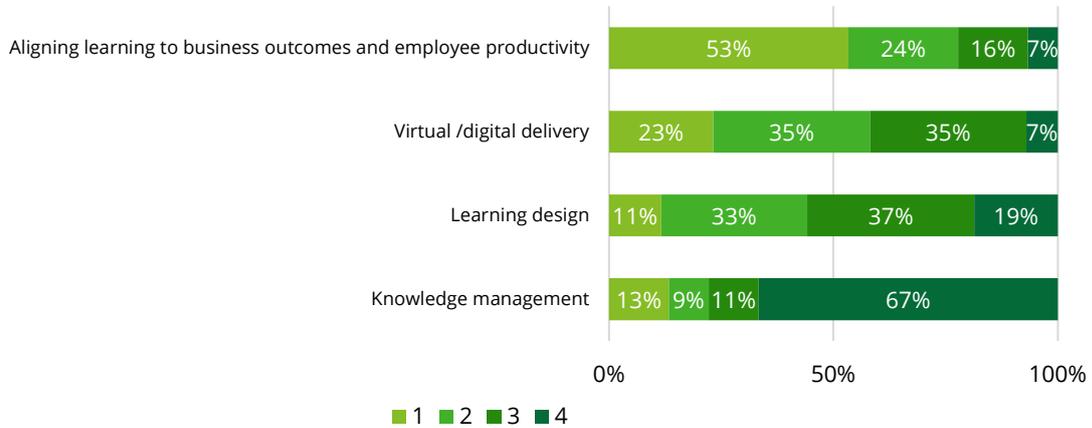
2. How is the L&D team supporting learning activities with increased usage of learning platforms during COVID-19?



Insight Enterprises report that their training teams are largely focussing on creating new content that comprehensively outlines all necessary information for their employees.

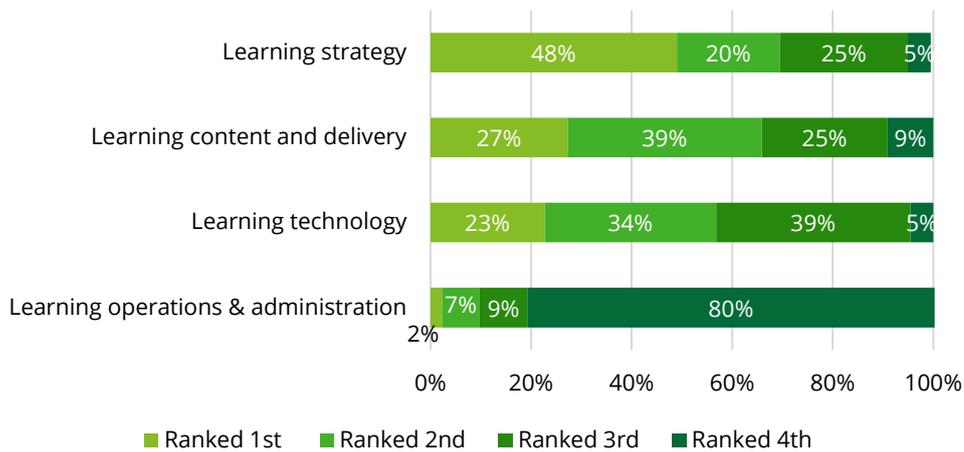
Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

3. Which of the following is a priority for your learning strategy after COVID-19?



Insight This chart indicates the importance of alignment of learning systems that is strongly felt when learning becomes a key priority for organisations to develop their talent pool.

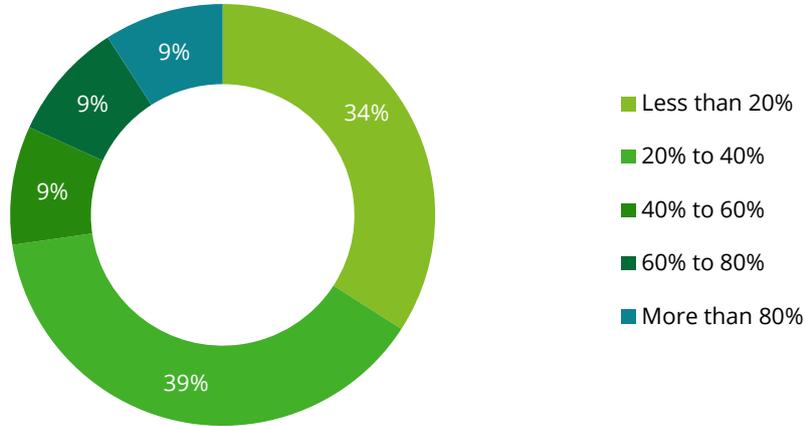
4. Which area of learning will be the top priority for your organisation in the future?



Insight Organisations have outlined a learning strategy as the top most priority for development, learning content and delivery have been largely noted as a second priority.

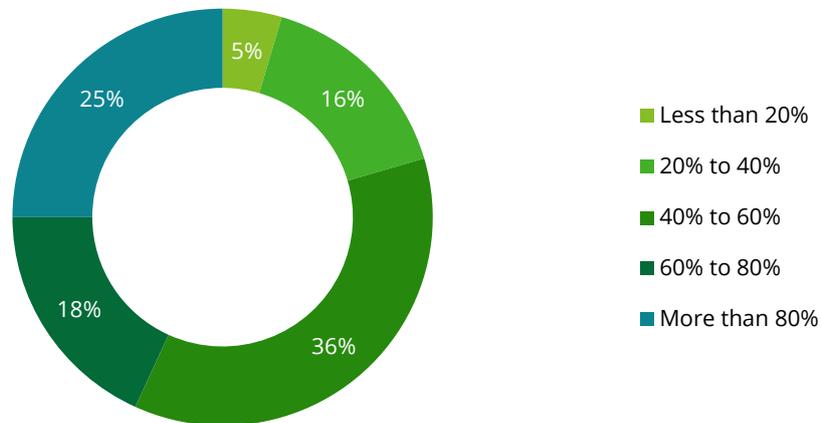
Note: Percentages may not total 100 percent due to rounding.

5. What percentage of formal learning in your organisation constituted of virtual learning before COVID-19?



Insight Almost 75 percent of all organisations surveyed report that the e-learning played a minimal role (if any at all) in the enterprise's formal learning structure for employees.

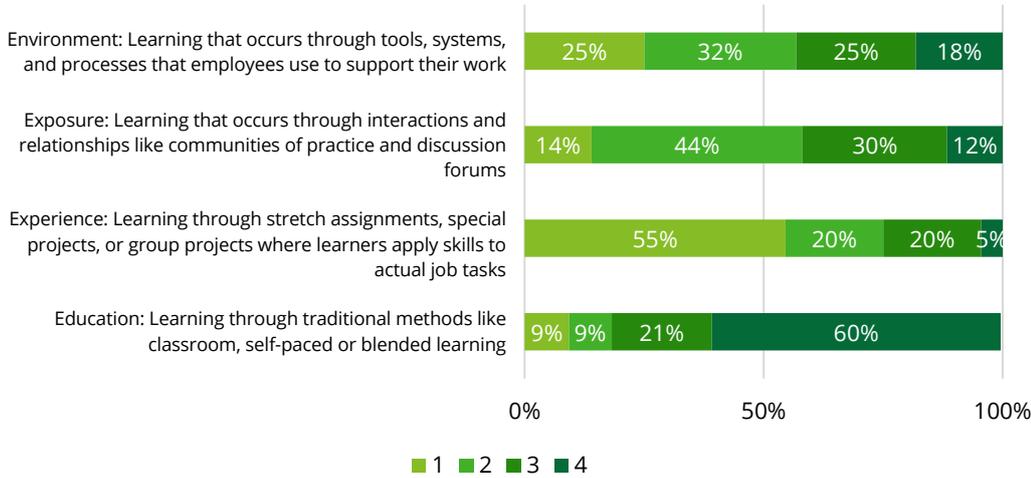
6. Virtual learning would constitute what percentage of formal learning in your organisation currently and/or in the future?



Insight More than three-quarters of organisations are willing to have at least 40 percent of all their training content developed or delivered virtually.

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

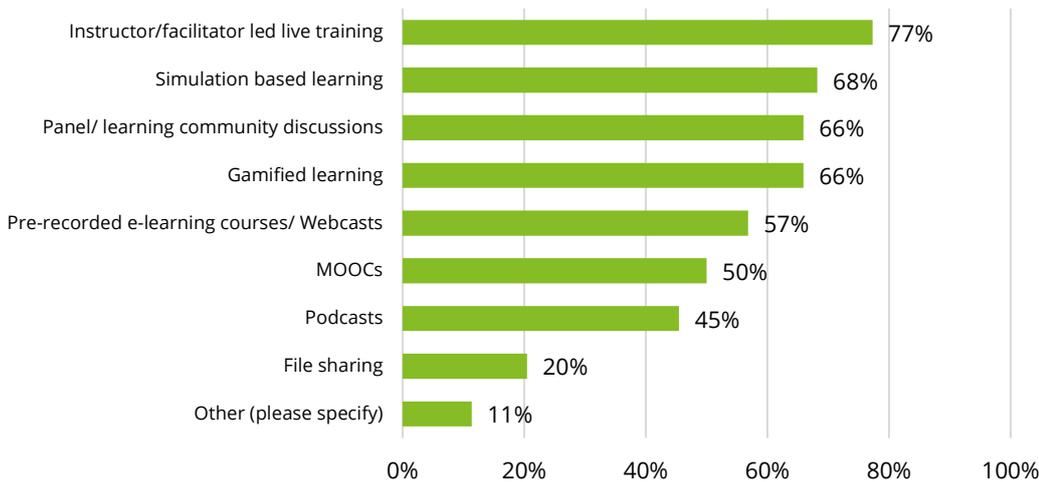
7. Which of these elements of continuous learning will you be focussing on after COVID-19?



Insight This chart indicates that a COVID-induced evaluation of learning systems and techniques, have quite likely outlined employee experience as an area of importance to be developed.

Note: Percentages may not total 100 percent due to rounding.

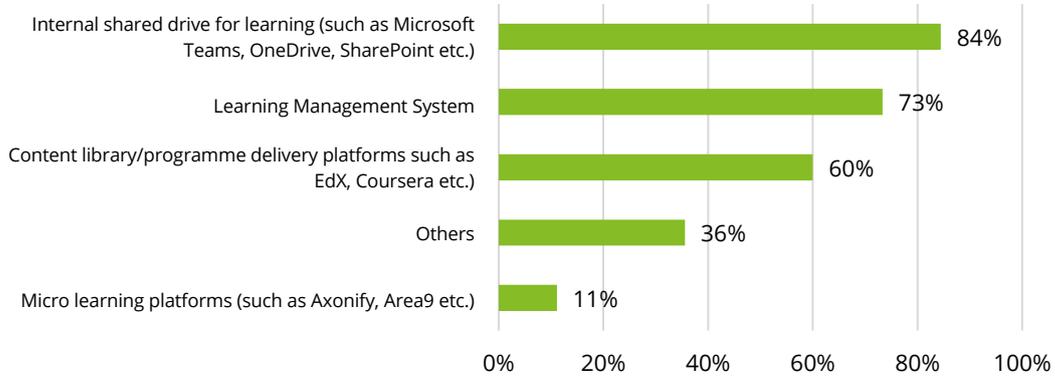
8. In the future, which of the following virtual learning methods do you plan to invest in?



Insight Significant importance is being given to experience-based learning and development, with enterprises opting to invest in live sessions, gamified learning, and simulation-based learning.

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

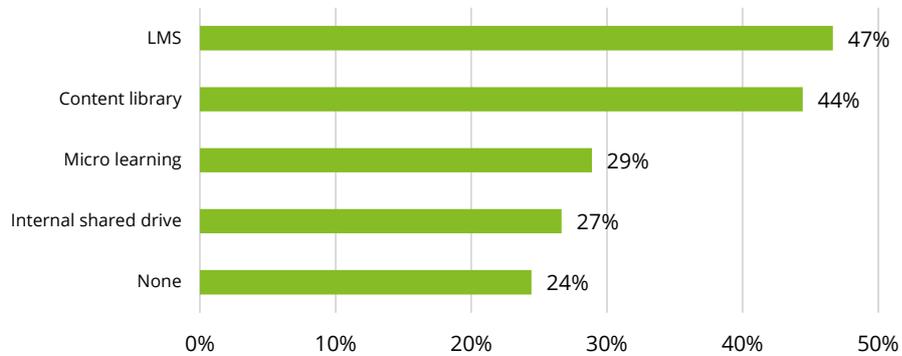
9. Which of the following platforms are utilised for learning in your organisation?



Insight

A number of organisations are reportedly utilising their own internal shared drives to distribute content and many have also begun to use personalised learning management systems.

10. Which of these learning infrastructure elements do you plan to invest in over the next 12 months?

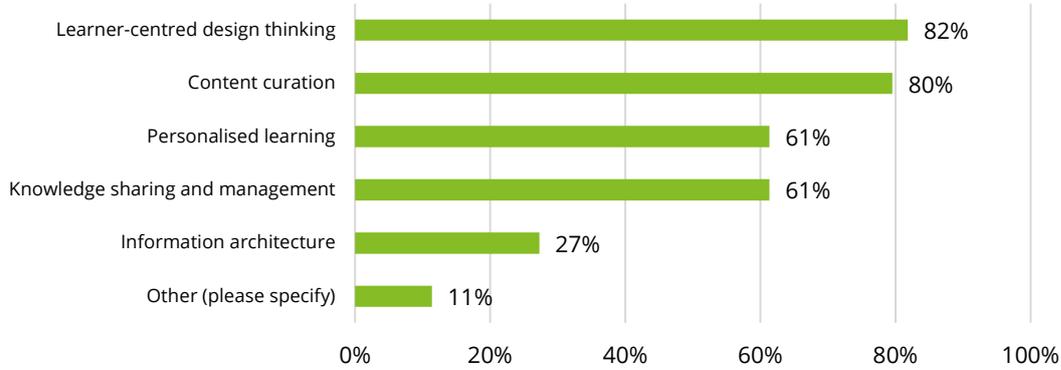


Insight

Most organisations seem to have short-term plans to invest in Learning Management Systems and content libraries for their employees.

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

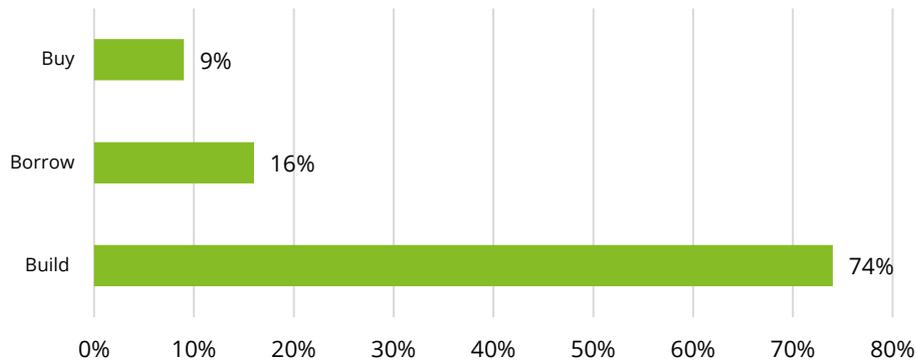
11. How was the adoption of your existing learning platforms affected during COVID-19?



Insight

The most significant impact, observed by organisations, was learner-centred design thinking with content curation coming in at a close second.

12. In the learning context, which approach do you intend to follow for providing the right content to learners?

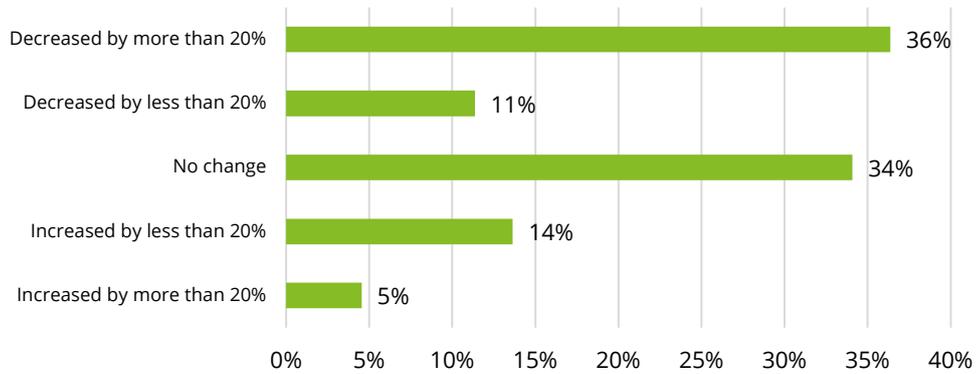


Insight

When given a choice, organisations opt to build customised content for learners rather than utilise pre-existing content for appropriate contextualisation.

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

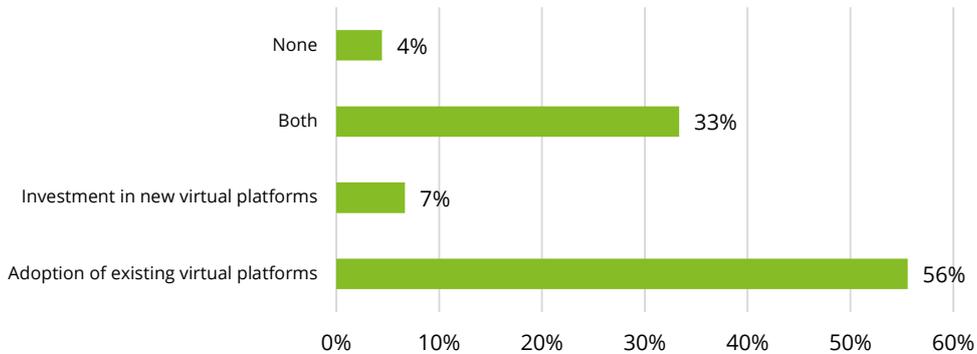
13. What has been the effect of COVID-19 on the L&D budget?



Insight

L&D budgets dropped for a majority of the organisations surveyed (47 percent) but remain same for 34 percent of them and interestingly, even increased for some.

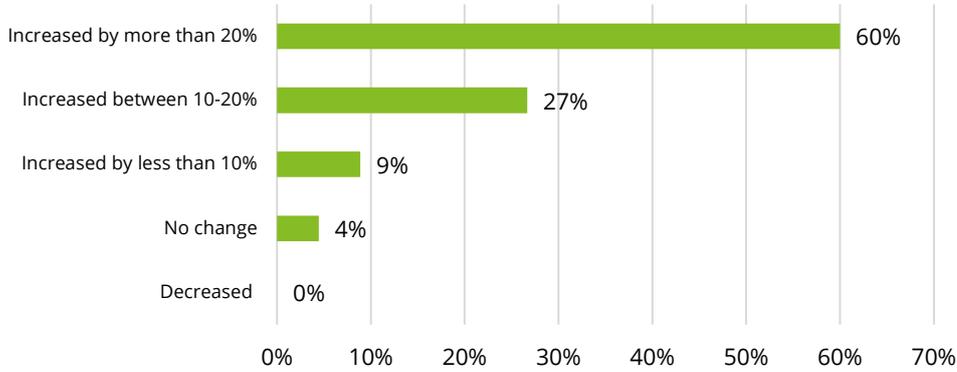
14. Did you invest in new virtual learning platforms or focus on the adoption of existing platforms during COVID-19?



Insight

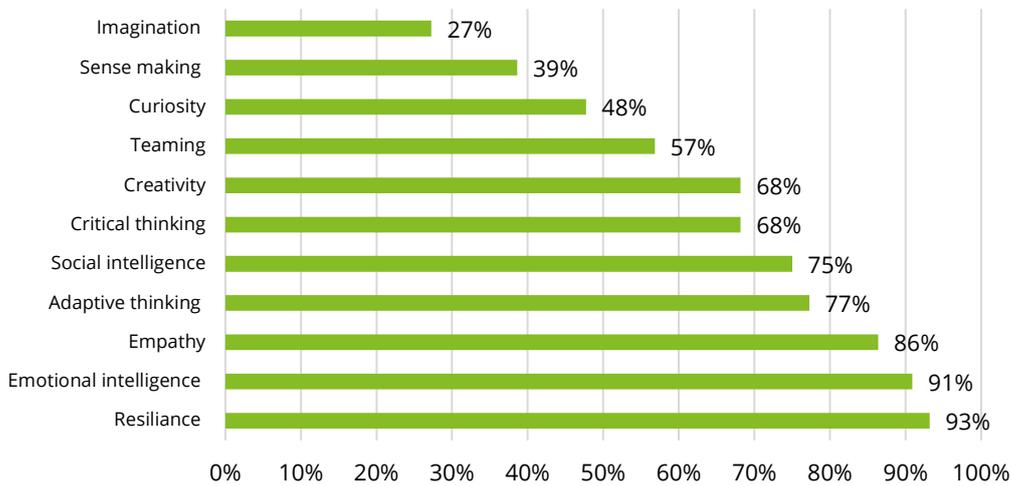
56 percent organisations tried to drive the adoption of existing virtual platforms, while a third of all firms surveyed opted for a balanced mix between investing in new platforms and using old ones.

15. What was the effect on the adoption of your existing learning platforms during COVID-19?



Insight More than 60 percent organisations saw the adoption of existing learning platforms increase to more than 1.2x after COVID-19.

16. Which of the following capabilities are critical for your organisation?



Insight Organisations have recognised the importance of resilience, emotional intelligence, and empathy in the workplace, with at least 85 percent of them wanting these critical skills to be inculcated in their organisations.

Source: Deloitte study in collaboration with NHRD conducted in 2020 (n=45)

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