![Challenging Frontiers - Independent insight, advice and research](logo)

# The impact of Covid-19 on organisational learning

Research Paper by Challenging Frontiers Ltd.

**March 2021**

> 66
>
> *"Moving beyond learning needs... an interesting soundbite from Sukhvinder that prompts a positive debate here as to why L&D really needs to change its game. A read for any L&D team willing to take the next step."*
>
> Simon Gibson,
> Learning and Organisational Development Director

> 66
>
> *"This is a useful study to look at the strategic and tactical decisions L&D made when faced with digital learning and virtual events in 2020, that was new to so many. This gives direction for the imperative of digital skills development in 2021."*
>
> Jo Cook, Director,
> Lightbulb Moment

# *Foreword*

Learning and development has faced many challenges over the years and Covid-19 could be its most challenging yet. But out of adversity comes opportunity and the pandemic has been a catalyst for significant change in the sector.

The movement to an online provision has helped to broaden both skill sets and mindsets of L&D professionals, which in turn has benefitted the organisations and employees that they work with.

The ripple effect of Covid has continued to be felt, with digital learning providers developing and expanding their offerings to meet the rapidly evolving learning needs across the globe.

Whilst there are many positives, there have also been negative disruptions that have impacted professionals directly in terms of their resourcing and roles. This must be acknowledged.

As the pandemic progresses and as we move towards more normal ways of living and working, we must not be solely focussed on returning to pre-Covid times - research and reflection is fundamental to the evolution of L&D. So, we must consider the changes that have occurred and the research that has emerged to best develop ourselves and our organisations for the future.

**Dr Hannah Gore**

Learning Experience Director
The Canonbury Consultancy Group

# *Introduction*

The Covid-19 pandemic has had a huge impact on L&D. It has forced organisations and L&D departments across the world to rethink how they provide learning and development solutions to their workforce. Pre-pandemic, many organisations lacked the skills (and impetus) needed to make the shift from delivering in-person solutions to virtual solutions. Many of them have since acquired those skills or are in the process of acquiring them, but some have not moved the dial on and have instead stood still.

L&D needs to be proactive about steering the learning agenda forward. Change is everywhere and L&D needs to be part of that change.

In particular, it needs to consider two things:

- the strategic opportunities of focusing on organisational performance needs

- the tactical implications of upskilling L&D teams so they can deliver learning solutions at the point of need, rather than always defaulting to events as the go-to learning solution.

In November 2020, as Covid-19 forced the UK into a second lockdown, it seemed a very good time to conduct a study on Covid-19's impact on L&D. The study seeks to provide some insight into how Covid-19 has impacted on the L&D skills landscape and the role of digital and virtual technologies. The survey was open from 26 November 2020 – 14 January 2021. It was mainly communicated and shared on the social media platforms Twitter and LinkedIn. No statistical analysis has been carried out on the data, so the analysis carried out is a matter of interpretation of the results.

Here are the findings from that survey
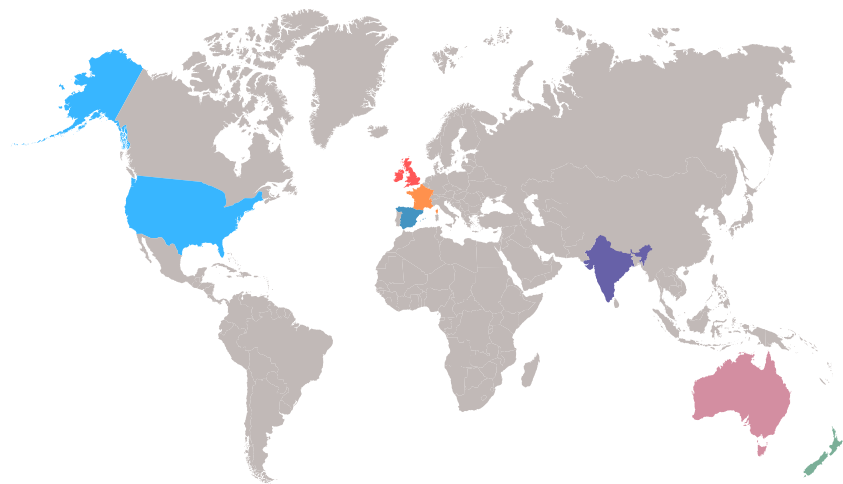
# How Has COVID-19 Impacted L&D?

With so many of us now working from home, organisations have had to adjust to meet the demands of the new 'normal'. How have organisations adapted to the learning needs of their staff when traditional training methods are no longer available?
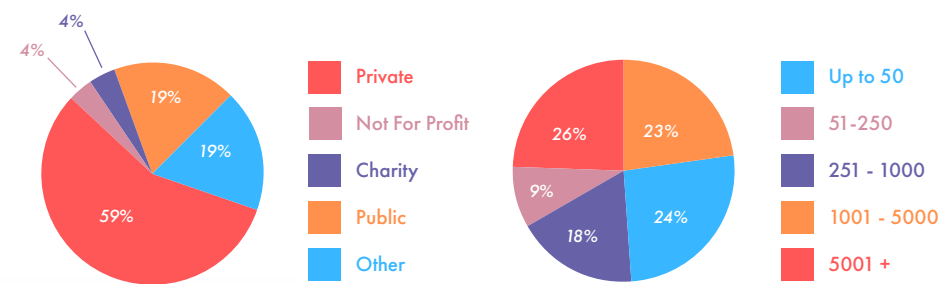
## The Sample

### Organisation Location

- **UK** - 71%
- **Other*** - 29%
- **USA** - 18%
- **India** - 5%
- **Australia** - 5%
- **New Zealand** - 5%
- **France** - 3%
- **Spain** - 3%

*Other represents 17 additional countries

## Out of *155 respondents*
## *73% were in-house*

4%
4%
19%
19%
59%

- Private
- Not For Profit
- Charity
- Public
- Other

### L&D Sector

26%
9%
18%
24%
23%

- Up to 50
- 51-250
- 251 - 1000
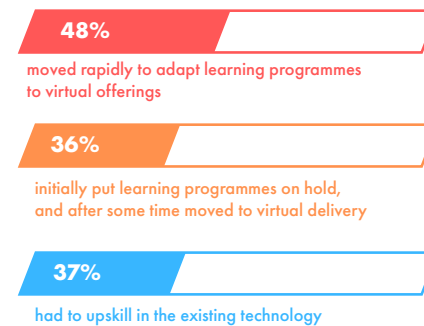- 1001 - 5000
- 5001 +

### Organisation Size

## The Effect
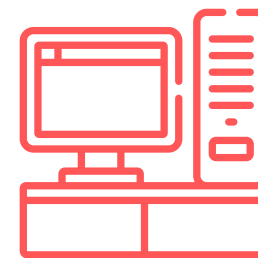
**85%** moved to virtual learning

**41%** have adapted learning programmes for virtual but spread out over modules

**49%** have moved everything to virtual and designed it for effective online learning

**13%** moved to virtual training but made no changes to the design

### Changes to L&D Focus

**48%**
moved rapidly to adapt learning programmes to virtual offerings

**36%**
initially put learning programmes on hold, and after some time moved to virtual delivery

**37%**
had to upskill in the existing technology

**44%** already had digital learning skills

**36%** already had virtual training & facilitation skills

**21%** had to learn digital learning skills

**49%** had to learn virtual training & facilitation skills
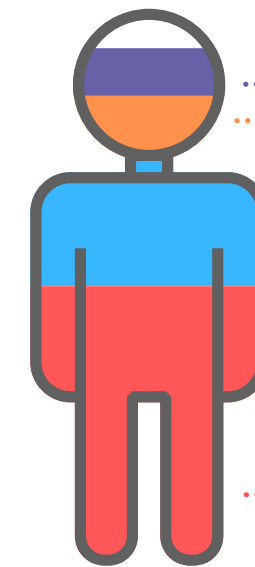
**42%** saw no change in their budget

**24%** had a slight reduction in their budget

**20%** had a significant reduction in their budget

## The Support

**9%** saw their team furloughed before organisational restructure

**12%** saw some redundancies to their teams

**22%** saw no changes to their team structure

**50%** were able to continue their roles remotely from home

**60% of respondents have had their technology needs changed due to COVID-19**

**50%** introduced improved e-learning content

**36%** introduced improved digital learning offerings

## "What different offerings have you brought to L&D because of Covid-19?"

**55%** increased wellbeing offerings

**59%** increased support from managers and remote working

**59%** were given opportunity to provide learning through digital and virtual means

**53%** increased support for working from home and supported people to adapt well

**47%** were given improved access to digital learning

**There are some really interesting findings here – standouts stats such as:**

*85%* of respondents moved to virtual learning

*41%* adapted learning programmes for virtual but spread out over modules

*49%* have moved everything to virtual and designed it for effective online learning

*13%* moved to virtual training but made no changes to the design.

There is lots more, but before we go into those findings in detail, it's important that we think about the context, the environment L&D was operating in prior to Covid-19. This means taking a step back from the findings for a moment to look at digital technology and virtual technology – how they've evolved, how they've been implemented (or not) and what they can deliver to L&D and organisational learning.

# The backstory

We all know the traditional L&D format, as provided by L&D professionals, vendors, consultants, facilitators, learning technology companies and suppliers everywhere: in-person, face-to-face learning solutions, typically delivered through a mix of meetings, workshops and training courses. Pre-pandemic, digital technology was increasingly being used to facilitate learning solutions, but it was largely a back-stage tool, rather than the centre-stage offering. Most large, multi-national corporates had the technological infrastructure to facilitate digital and virtual learning solutions, and some made good use of virtual training, but in the main, face-to-face was the predominant solution.

This is despite the fact technology capabilities had improved to the extent that entire university courses could be delivered digitally and remotely and digital libraries had been developed covering content from negotiation skills and project management skills to expert leadership advice. Take-up of digital-first learning was still disappointingly slow.

Then Sars-Cov-2 virus, more commonly known as Covid-19 or Covid, arrived. It hit UK shores in early 2020, plunging the country into national lockdown and entire workforces into remote working (and learning). Almost overnight, organisations and L&D teams found themselves having to use digital and virtual technology in order to deliver learning and performance solutions.

# *Differentiating digital and virtual technology and solutions*

## Digital technology

Digital technology has evolved from e-learning. When e-learning was introduced in the 1990s as an alternative and cheap learning product, it gave rise to a new set of skills, primarily instructional design skills. This new set of skills enabled e-learning vendors to build generic banks of content libraries as off the shelf solutions, as well as bespoke and tailored content creation solutions for more acute business needs.

This evolution of instructional design skills and the use of e-learning brought into question the effectiveness of traditional click-next e-learning. Practitioners started experimenting with other forms of content development and improvements in technical capability led to more functionality. With the introduction of animations, video inclusion, audio recordings and rapid authoring tools, e-learning became a much more sophisticated branch of learning and development.

At the same time as e-learning capability was improving, social media exploded, changing the way people consumed content. It also changed how and where people learned. They weren't created as learning platforms, but social networks such as YouTube and Twitter and blogging platforms such as WordPress and Blogger, became great places for people to share learning. Increasingly, people used these platforms to document their learning and comment on it, also enabling other people to respond with their own thoughts and experiences. This led to a rise in ongoing, asynchronous discussions as an important part of the learning journey.

Not only were people sharing in more open and direct ways with like-minded professionals, but the capability of the tech also advanced rapidly. It went from being a primarily text based set of media (with the exception of YouTube, of course) to enabling graphics and video clips to be shared easily as data capability progressed from 2G through to 5G.

The development of social media as a tool for sharing learning introduced an unexpected source of digital learning that was created independently of learning and development needs and departments: YouTube. Through YouTube, people could readily access content on a range of topics that helped them learn skills – knitting, TED talks on vulnerability, home plumbing tutorials...

It was consumers who moved the digital learning agenda on, moving it into the realm of digitally created content that wasn't e-learning.

This precipitated the need for new digital learning skills – from the ability to author e-learning content to the ability to curate relevant content from the internet and for platforms to develop their own learning content that could be accessed as quickly and easily as YouTube, unfettered by corporate sign-in systems. These tech developments and related skills took L&D into new territory. Skills such as graphic design, video creation, storyboarding, storytelling, modular based content, technology skills and curation skills, are not everyday L&D skills. As a result, the profession has expanded to include people who do not have the traditional L&D skills set, but do provide valuable resources and capability that would otherwise be lacking.

> *This definite shift to more direct support is a strong indication that traditional methodologies such as learning needs analysis are limited in their scope.*

## Virtual training

Virtual training technology has been around since the 2000s. Originally, it was used for webinars, mostly as a one-way form of communication with people accessing a web link to watch a live video connection. The technology was a bit limited - only a certain number of people could access a webinar before servers were overloaded. But, technology improved rapidly, capacity increased and webinars evolved into a more sophisticated offering.

Now, you can have 50 people on the same video call, all interacting and without any connectivity issues.

At the same time that social media and digital learning was taking off, virtual collaboration tools were being developed, enabling people to contribute to activities like brainstorming and to edit other people's work in real-time. As more and more companies realised their global teams needed this capability, it became an accepted way of working and collaborating.

This development of virtual collaboration tools directly influenced the virtual training technology world as well. Today, it would be difficult to imagine a virtual training platform that didn't allow you to do some kind of whiteboard activity, have breakout rooms for small group activity, and a chat facility that lets people communicate directly with the lead presenter/facilitator and other delegates/attendees/learners.

We also now have virtual facilation. The development of online facilitation skills capability has been a challenge for many L&D people and many put it off until they had no choice.

---

**Virtual facilitation and virtual learning skills include things like:**

- designing for online and distance learning

- a deeper understanding of the psychology of learning and how the virtual environment needs to adapt to meet these learning needs

- understanding how to read digital body language to determine engagement and interaction in a virtual session

- providing a learning environment where discussion and debate can take place

# *What the survey tells us*

## The shift to virtual training and digital skills

The majority (85%) of respondents moved their learning to virtual. Roughly 40% of learning programmes were moved to virtual and designed to facilitate effective online learning. These are promising statistics, but there is still scope for more L&D teams to make virtual training a core delivery choice.

The fact that some people have not moved their learning to virtual could signify a degree of uncertainty about the impact of Covid-19 on working practices going forward. Do those people expect to return to the office and the training room, as before? Or is the requirement to develop a new set of skills in order to go virtual too daunting?

Only 36% of respondents say they have undergone virtual training specifically, which suggests there is a reluctance to develop this skill set. Almost 50% have undertaken opportunities to develop their virtual facilitation skills. This isn't a problem necessarily, as it would be unreasonable to expect all L&D to be experts in virtual facilitation skills.

The finding that 43% of respondents have digital learning skills is very encouraging, as it suggests a strong recognition of the need to provide an array of digital learning resources. Likewise, the finding that 20% of respondents are taking the opportunity to develop their digital learning capabilities indicates a recognition of the need for digital skills. The survey did not uncover which kind of digital skills need to be learned or which were already present.

## How L&D has changed

Roughly 10% of the respondents lacked the technological capability to delivery virtual or digital learning. Interestingly, about 37% had to learn about the technology already present in their organisation in order to move to virtual learning as an option. This is interesting. Why? Because if most of the workforce is already using technology such as MS Teams or SharePoint to communicate and share documents with each other, it makes sense to upskill the workforce in these technologies to enable more effective homeworking and remote working capabilities. The industry is always talking about the importance of performance consulting capability.
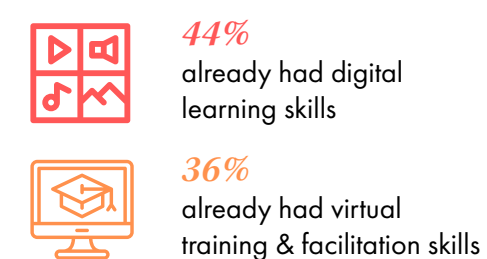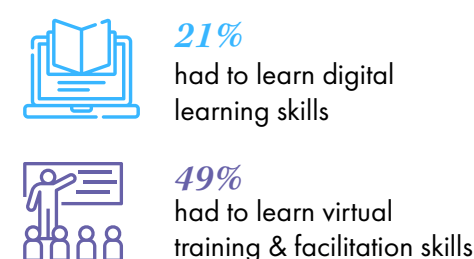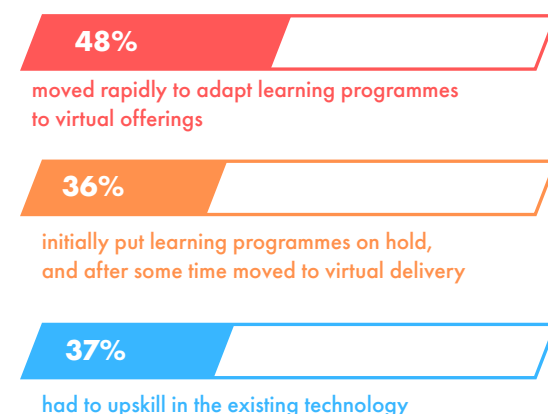
Now is a good time to introduce and embed the technology that enables that performance consultancy to happen, because organisations have seen that digital works.

A significant number (59%) of respondents said they have taken the opportunity to deliver more through digital learning, which is a good sign that organisations believe in digital as an effective learning solution.

Roughly 48% of respondents moved their learning programmes to virtual formats. And 35% initially put all learning programmes on hold before making the move to virtual. These findings suggest the capability for moving to virtual programmes was limited and not common practice. And again, they suggest the focus has been on delivering in-person solutions and that L&D has been reluctant to provide virtual or digital solutions. They also raise questions about the perception of virtual training and digital learning within L&D. Does L&D see them as legitimate solutions that don't involve an in-person element?

The study shows that, as the pandemic unfolded, a large number of respondents focused on delivering offerings that were highly relevant to the dramatic change in working circumstances. Between 53% and 59% of respondents increased wellbeing offerings to staff, increased support to managers in managing remote teams and increased working from home support. This definite shift to more direct support is a strong indication that traditional methodologies such as learning needs analysis are limited in their scope, not least because they don't facilitate an agile response to changes to the work environment and patterns. Understanding performance needs and understanding learning needs are two different things – organisations and L&D have to realise and act on that.

## *Changes to L&D Focus*

**48%** moved rapidly to adapt learning programmes to virtual offerings

**36%** initially put learning programmes on hold, and after some time moved to virtual delivery

**37%** had to upskill in the existing technology

*21%* had to learn digital learning skills

*49%* had to learn virtual training & facilitation skills

*44%* already had digital learning skills

*36%* already had virtual training & facilitation skills

# *Budget implications*

## The impact on learning technology

The survey findings demonstrate a change in technology needs from a learning technology perspective. A significant number (60%) of respondents had to improve their learning technology capability, a clear indication that pre-pandemic, not as much attention was given to the learning technology capability needed to provide digital and virtual technology solutions. It also demonstrates just how much virtual solutions were seen as inferior to in-person solutions.

It's worth noting that the improvement in technology tended to focus specifically on e-learning - almost 50% of respondents concentrated their efforts here. Just over a third (35%) introduced digital learning content. Only a few chose to change their LMS or LXP provisions. So, although 60% improved their learning technology, the focus appears to have been on the delivery of passive e-learning options, not more direct capability with LXP potential.

## The impact on strategy and the perception of L&D

The findings indicate that there has been little change to strategy. The focus has largely been on developing programmes into virtual offerings and the move to more digital learning. For some, the pandemic presented the opportunity to introduce learning technologies into their organisations. For others, the focus has been more tactical, addressing immediate needs around wellbeing. As the pandemic forced many businesses to fundamentally change their operating models, perhaps it made sense for L&D to wait for the dust to settle before progressing strategy development.

However, the findings do raise questions about the ambitions of L&D and how it sets out the ambition for learning in organisations. If the objectives are for L&D to deliver tactical and operational solutions, the strategy will always be reactive to the needs of the organisation. L&D needs to take the opportunity to make capability about organisational performance and talent performance, as opposed to just delivering on learning needs.

The budget findings were surprising. Roughly 65% of respondents saw no or little reduction in their L&D budget. Why is this surprising? Because usually, when times are tough, the L&D budget is an obvious casualty.

The fact that so many respondents retained most or all of their budget suggests that

business leaders realise that L&D has a key role to play in providing learning solutions that will help organisations navigate their way through the current change.

We don't know how the budgets have been used, but it is encouraging to see that they have been maintained during a period of huge financial turbulence.

However, 20% of respondents reported a significant cut to their budget. These cuts will make it harder for them to implement learning plans and in some cases, the plans may have to be pulled altogether. But it is encouraging that only one in five respondents reported budget cuts - the fallout could have been much worse.
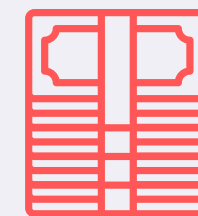


*42%*
saw no change
in their budget

*24%*
had a slight
reduction in
their budget

*20%*
had a significant
reduction in
their budget

# *Diversity and inclusion*

During 2020, we saw importance given to the movement of #BlackLivesMatter in the wake of the killing of George Floyd in America. This presented organisations with an opportunity to do more to improve diversity and inclusion solutions.

It is rather sad to see that 27% chose not to act differently in the wake of such important social justice. This finding shows that although difficult topics such as anti-racism have gained in prominence, much still needs to be done to enable these discussions to take place in organisations.

Roughly 33% of respondents said their leaders took the lead on conversations on the topic of #BlackLivesMatter and 41% said their diversity groups took the lead. Plus, 27% hosted webinars and virtual training on the topic.

These are interesting figures as they provide an indication of the motivation to change – or not. With more than 60% still not acting to advance the conversations around anti-racism and social justice, it raises important questions of how diversity and inclusion are genuinely given a platform inside organisations. It isn't incumbent on L&D to be the leaders of these types of conversation, but without a strong leader to ensure D&I is as important a business discussion as product or service development, we will still see many instances of injustice and discrimination taking place. D&I is a really important business consideration and it shouldn't be overlooked.

"

*More than 60% of respondents are still not acting to advance the conversations around anti-racism and social justice.*

**The study didn't ask what the future might look like, but people did provide their thoughts on what opportunities may become available. Three comments in particular stand out:**

**Comment 1**

"It has made me realise that we need to think more digitally and consider other training and L&D methodologies." This is a powerful realisation, indicating that there is still not enough understanding of the true impact of digital on business. Pandemic or no pandemic, digital has consistently pushed the delivery capability of organisations to be more responsive to consumer needs and it's a trend that will continue. This also has a direct impact on the expectations of the workforce regarding the learning solutions available to them.

**Comment 2**

One respondent's team was "exhausted with such a lot of upskilling under time pressure". This again speaks of a lack of understanding about digital capability. Digital learning and virtual learning technologies are impressive and the opportunities to develop team capability were abundant pre-pandemic. From a strategic perspective, this highlights the fact that L&D isn't always ready to advance its own capability to meet the changing demands of business. It has been holding onto ineffective practice - being bound to events as the go-to learning solution. If we don't take the time and opportunity to develop the digital capability, L&D risks becoming redundant because of a lack of internal skills development.

**Comment 3**

"The pandemic has shown us the need to be agile and adaptable all the time and not just in response to a crisis." This speaks volumes in its wisdom. It makes sense for a profession to have an established set of practices it can rely on. In-person learning design and facilitation has been the mainstay of many in L&D - pre-pandemic, many large organisations, multi-national organisations and multi-site organisations already had a need for learning opportunities to meet people where they were at, rather than at a place that suited the learning team. Digital and virtual technologies enable us to be just as effective in delivering learning solutions without having to be tied to events as the learning solutions – be they virtual or in-person.

# *The future potential*

# *Conclusion*

The study provides a snapshot in time of the capability of L&D and the adaptation of strategy to the unexpected demands of a global pandemic. The data shows that L&D was not prepared for the need to move to digital and virtual solutions and it is clear why – because L&D has been overly reliant on in-person events as the core learning solution. Even though virtual and digital solutions are more than capable of delivering performance enhancing solutions and even though they have been readily available for some time, the evidence suggests L&D has been reluctant to make the switch.

Because of Covid-19, organisations are having to radically rethink their business operating models and they really need L&D on board. But, L&D seems to be lacking the capability to understand organisational demands beyond learning needs. Genuine performance enhancing solutions require L&D to be business partners and they require L&D to properly understand and believe in digital's potential. The workforce has embraced digital ways of working. If L&D thinks it has a mandate to ask people to come together at in-person events when things open up again, it will need to have a very strong rationale for doing so. Why? Because people will rightly point out that they can learn just as effectively remotely and asynchronously.

The data also suggests that learning technologies are not being used to their full potential. Many modern LMS and LXP platforms offer a range of digital learning solutions but L&D's focus on in-person events has kept digital platforms as a "second best" option. This is a fundamental misunderstanding of how digital can be used and it suggests that L&D has not sought to understand how learning can and is taking place. There are so many performance enhancing options available now, but take-up is not where it should be. It is concerning to see that so many – the majority in fact – have not tried to develop their digital or virtual training skills and all because they hope that post-pandemic, we will return to the office environment and the much lauded training room. We can do better than that.

*The data and this study is provided open-source and is available to be referenced freely, the author requests proper attribution be given if this paper is quoted from or referenced.*

# *Key Actions*

*1* Undertake virtual skills development to upskill in both virtual facilitation and virtual learning design.

*2* Invest in development of digital content creation.

*3* Seek out experts in development of digital learning experiences and digital learning resources.

*4* Read more about performance consulting as a regular practice for your L&D team.

*5* Identify the most common business problems and create digital aids to resolve them.

*6* Move from annual learning needs analysis approaches to more regular meetings with senior managers and leaders to understand their direction of travel.

*7* Partner with Challenging Frontiers to understand your learning technology landscape and what potential there is for your organisation.

> ❝
>
> *Genuine performance enhancing solutions require L&D to be business partners and they require L&D to properly understand and believe in digital's potential.*

# *Appendix One – Demographics*

In all, the global study attracted 155 respondents.

**Role Type**

36% of respondents were in L&D Manager (or equivalent) roles.

29% of respondents were in L&D consultant roles.

12% of respondent were in L&D Director (or equivalent) roles.

The remaining 23% of roles were a mix of L&D and other HR related roles.

**Sector**

18% of respondents were in Public Sector roles.

59% of respondents were in Private Sector roles.

8% of respondents were across Charity and Not-For-Profit organisations.

The remaining 15% were a mix of the above or in higher education.

**L&D Market**

73% of respondents were in in-house roles.

17% were in independent consultant roles.

8% were in vendor / supplier roles.

**Size of Organisation**

24% of respondents worked in organisations of up to 50 people.

9% of respondents worked in organisations of 51-250 people.

18% of respondents worked in organisations of 251-1000 people.

23% of respondents worked in organisations of 1001-5000 people.

26% of respondents worked in organisations above 5001 people.

**Country**

71% of respondents were from the UK.

18% of respondents were from USA.

Other countries with more than 5 responses included: France and Spain (5 responses from each), India, Australia and New Zealand (each with 7 responses).

In addition, responses came from a further 24 countries.

In total, 31 countries responded to the survey.

# *Appendix Two – Survey questions*

1. Have you moved your learning to virtual?
2. If yes, how has your virtual training changed due to Covid-19?
3. In what ways has Covid-19 changed your skills?
4. How has Covid-19 changed your L&D focus?
5. What different offerings have your brought to L&D because of Covid-19?
6. How has your learning budget been affected by Covid-19?
7. Have your learning technology needs changed due to Covid-19?
8. If yes, how have they changed?
9. How has your team been affected by Covid-19?
10. Has your learning strategy changed due to Covid-19?
11. If yes, how has your learning strategy changed?
12. Do you think the perception of L&D has changed due to Covid-19?
13. If yes, how has the perception of L&D changed due to Covid-19?
14. Is there anything else you'd like to comment on about the impact of Covid-19 on L&D?
15. 2020 also saw importance given to discussing topics around anti-racism and #BlackLivesMatter. What have you done in L&D to support these efforts?

# *Appendix Three – Raw Data*

To access the raw data use this link to OneDrive

https://1drv.ms/x/s!As45aYATvM6by2aTppQ_Yr_TGrxm?e=fFoIsK

This is view only rights. If you need to access the data to manipulate for your own research purposes, please get in touch with Sukhvinder Pabial directly.

# *Contact*

Please direct all queries to hello@challengingfrontiers.com

This paper can be quoted from and attribution should be given as follows:

"Impact of Covid on L&D", Research paper by Sukhvinder Pabial, Senior Learning Strategist of Challenging Frontiers Ltd, March 2021.

## *Acknowledgements*

**Challenging Frontiers Ltd.**

1A Pike Way,
North Weald,
Epping, Essex
CM16 6BL

Sukh (+44) 07961-700305

hello@challengingfrontiers.com