redthread research

Next-gen learning methods:

What to use, how to choose, and when to cut them loose

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Key takeaways

1. **The pandemic upended L&D's go-to learning methods.** The COVID-19 pandemic forced most L&D functions to throw out their tried-and-tested, course-focused learning playbooks and experiment with new ways to enable employee development. That's a good thing, both now and for the long term.

2. **There are lots of learning methods.** The research identifies well over 60 methods that orgs use to develop their workforces.

3. **Most learning methods are familiar.** The majority of the learning methods we're seeing have been around for a while. But they're being used in new and next-gen ways.

4. **Learning leaders should understand all their options.** There are lots of learning methods available. This report provides an overview of RedThread's Employee Development Framework, which outlines 6 behaviors that L&D functions should be enabling. It also categorizes learning methods for each of these 6 behaviors so leaders can assess whether their org has the right blend of methods.

5. **To choose the right learning methods in the right combinations, learning leaders should:** 1) understand the messages that methods send; 2) experiment, iterate, and push boundaries; 3) use combinations of methods that offer flexibility and personalization; 4) not get distracted by the new and shiny; and 5) let go of what's not working.

The panic—and the opportunity

The pandemic forced most L&D functions to throw out their tried-and-tested, in-person, instructor-led-learning playbooks. Indeed, in the early months of the pandemic, one of the most common questions we got was, “How do I get all my learning online, ASAP?”

And then there were several months when leaders realized that they might never get all their classroom training online, and what’s more, maybe that shouldn’t be the goal. Even before the pandemic, it was increasingly clear that the waterfall development methods, reliance on courses, and one-size-fits-all approaches of the past were no longer working.

For one thing, these approaches haven’t supported the ways employees learn for a long time. Survey after survey has shown that employees learn more through the informal stuff—and therefore rely more on it—than the heavy, expensive courses L&D functions have tended to focus on.

And for another, the logistics of traditional learning approaches keep orgs from being as agile and responsive as they need to be in an unstable and fast-changing world. Today orgs can’t afford to wait 6 months for a training course to come online, constantly take employees away from their work to learn, and narrowly define “learning” so that only the formal stuff counts. Instead, they need a continuously upskilling workforce. And even the very best instructional design team can’t do that by themselves.

As orgs settle into new ways of working—hybrid, remote, flexible, whatever—leaders dealing with this new reality are hyperaware of the need to do learning and upskilling differently. And not just different-for-this-point-in-time, but differently forever. The ways people work have changed and will continue to change; the ways they learn must help them keep pace with and even stay ahead of those changes.

The ways people work are changing; the methods they use to learn must help them keep pace with those changes.

Learning methods—literally, the ways people learn—are key to the question of how orgs can enable learning and upskilling differently. There's a wealth of learning methods that can be leveraged in different ways to help employees develop their knowledge and skills.

To do this, though, L&D functions must know what those methods are and decide on the right ones, in the right combinations, for their org.

Which brings us to this study. Over the past few months, we've investigated both the methods themselves and how organizations are choosing them. We looked at over 60 articles, hosted a roundtable on the topic, and talked in depth with 15 learning leaders.

This report outlines what we found. Specifically, we'll introduce:

- An overview of learning methods and how they align to RedThread's Employee Development Framework
- How leaders are deciding (on a continual basis) what methods work best for their orgs
- Real-life examples of how orgs are leveraging learning methods in different ways to help employees develop

The next section introduces a comprehensive list of learning methods we've found in our research and discusses some of the major trends we're seeing. We then examine how those methods map to the RedThread Employee Development Framework and how different methods enable different employee behaviors.

To enable learning differently, L&D functions must know what learning methods are available and decide on the right ones, in the right combinations, for their org.

(Mostly) familiar methods, new applications

When we started this research, we were in search of the novel: innovative learning methods that cropped up in response to (or in spite of) the pandemic. But, surprisingly, most of them were familiar to us. Figure 1 shows the major learning or development methods we found through our literature review, interviews, and roundtables.

Figure 1: Learning methods in this research

Job rotations	Informational emails	Job aids	Mentoring	Self-paced online courses	Skills assessments
Books	Career coaching	Communities of practice	Browsing / searching intranet	Volunteering outside of work	Wikis
Automated recommendations	Instructor-led courses	Stretch assignments	Employee resource groups	Customer feedback	Team coaching / training
Professional / personal networks	Individual development plans	Manager feedback	Articles / blogs	Job shadowing	Videos
Recommendations from colleagues	Podcasts	Professional organizations	Simulations	Coaching	Browsing / searching LMS / LXP / platform
Standard operating procedures	Book clubs	Reflection activities	Virtual collaboration (e.g., Teams, Zoom)	Peer feedback	Talent / gig marketplaces
Expert directories	Live webinars	File sharing	Interactive apps	Recommendations from leaders	Conferences
Sandboxes	Job safety analysis	AR / VR / Immersive 3D	Informational interviews	Discussion forums	Gamification
Goal-setting	Browsing / searching internet	Leader as teacher	Town halls	After action reviews	Newsletters
Nudges	Role plays	Required training assignments	Performance statistics	Bots	Critical org skills definitions
Action planning	On-demand webinars	Skills ratings	User-generated content	Knowledge sessions (e.g., lunch & learns)	Adaptive learning

Source: RedThread Research, 2021

That isn't to say we didn't see innovation: if we hadn't, this would be a very short paper. But it didn't take the form we expected. While the discrete learning methods were familiar, some of the ways those methods were being utilized were surprising.

We'll provide specific examples throughout the paper; here are the general trends we're seeing.

More automation

Unsurprisingly, we have all gotten much better at using technology over the past 2 years. Also unsurprisingly, that improvement has yielded greater know-how about automating learning. Many of the vendors we spoke to are actively taking the "stupid work," like curation of learning content, off the plates of L&D professionals and using automation to enable employees to find the learning content and opportunities they need.

More personalization

As L&D has gotten better at automation, we're also seeing more personalization as orgs move away from rote, unchanging learning paths to something much more dynamic. We're not just talking about branching scenarios: L&D functions are leveraging learning methods that help to personalize the entire development experience, helping both the individual and the org accomplish their goals.

Leveraging the existing

They say that necessity is the mother of invention, and we've seen that in the past couple of years. Many L&D functions are leveraging what already exists—content, technology, ways people are already learning—instead of investing in or developing new ones. For example, one company we spoke with ditched a "social learning platform" for WhatsApp groups, which accomplished the same goals in a platform employees were already using.

More in the work itself

The increasingly urgent conversations in many board rooms and in cyberspace about skilling, reskilling, and upskilling have changed the

While many learning methods are familiar, the ways they're being used are new and innovative.

types of methods orgs are choosing for development. Traditional methods like classroom training will always have their place, but increasingly apprenticeships, individual development plans, job rotations, and stretch assignments are being leveraged to build skills while the employee is doing the work. Our friend Chris Pirie likes to say, “Learning is the new working.”

More self-service

The pandemic made asynchronous and self-service learning an imperative, building on the fact that employees are increasingly likely to create their own career paths rather than following traditional, predictable ones. In response, orgs are offering more self-service, employee-driven learning methods, rather than curricula that serve only the most obvious or common career paths.

More combinations of methods

We mentioned earlier that many of the methods identified by this study are familiar. What’s new, though, is that more combinations of those methods are being used to accomplish certain development goals. L&D leaders are thinking more holistically about using learning methods to accomplish a goal—so a leadership course may have a coaching element, an on-the-job capstone project, and technology that nudges participants toward the right behavior, rather than relying solely on classroom instruction.

L&D leaders are thinking more holistically about using learning methods to accomplish a goal.

In the midst of all this innovation, it might be helpful to introduce a structure that shows how all these learning methods can complement one another and be used systematically toward org goals. That's where we turn next.

Learning methods and the Employee Development Framework

A few years ago, we introduced the RedThread Employee Development Framework, shown in Figure 2. This framework describes the behaviors orgs should be enabling in their employees in order to have a solid learning culture. We use this framework to make sense of the world of employee development and to help leaders identify any gaps they should be paying attention to.

Figure 2: RedThread Employee Development Framework

Source: RedThread Research, 2019

The Employee Development Framework shows that L&D functions should focus their time on enabling employees to:

- **Plan:** Understand their career options and the development they'll need to get them where they want to go.
- **Discover:** Find the opportunities and content that will help them develop the knowledge and skills they need to take their career in the direction they want.
- **Consume:** Easily access relevant learning content—a challenging feat, given the amount of content available.
- **Experiment:** Practice new knowledge and skills on the job; try, fail, and learn from that failure.
- **Connect:** Learn from one another to gain new knowledge and skills.
- **Perform:** Learn on the job and improve performance at the same time.

For this study, we mapped the learning methods we identified earlier in this report (Figure 1 above) against the 6 behaviors in the Employee Development Framework. The results are shown in Figure 3 below. Similar methods are then grouped together under each behavior. This clarifies which learning methods can be leveraged to enable which behaviors.

We see, for example, that courses enable consumption, talent marketplaces enable experimentation, mentoring enables connection, and so on.

The Employee Development Framework offers a structure leaders can use to understand the universe of learning methods.

Different learning methods fall into different categories and enable different behaviors.

Figure 3: Learning methods in the Employee Development Framework

Source: RedThread Research, 2021

The remainder of this section addresses each of the 6 behaviors and the categories of learning methods that enable them. We'll also highlight real-life examples of orgs using these learning methods to enable each behavior.

Helping employees Plan their development

Helping employees plan their careers hasn't always been considered part of L&D's job. In recent years, however, L&D functions have recognized that career planning is a critical part of employee development: As L&D moves away from a one-size-fits-all approach to development, employees will need help figuring out what their own paths look like.

But L&D functions aren't the sole owners of career planning. It touches other areas like performance and workforce planning. To successfully enable employees to plan, L&D functions need to work with other HR teams and business units to ensure systems, policies, processes, and methods are synced up. And as we'll see below, some of the methods that support planning may not be owned by the L&D function, either, highlighting the need for close collaboration.

Learning methods that enable employees to plan their careers fall into 2 broad categories (shown in Figure 4):

- Information gathering
- Development planning

These 2 categories approach planning in different ways. Let's look at how they do this in more detail.

Methods for information gathering

Info-gathering methods help employees collect information about the skills they have and the skills they need. Methods in this category include:

Figure 4: Methods for planning development | Source: RedThread Research, 2021

- Skills assessments
- Skills ratings
- Informational interviews
- Critical org skills definitions

These methods help employees develop a clear understanding of their own current state as well as the "skills market" they will likely face in the future. Leading practices surface info about both the supply side (employees' skills) and demand side (org needs) of that market.

Methods for development planning

Development-planning methods help employees identify and commit to the development activities they'll undertake to achieve their goals. They enable employees to plan their development activities, and their order. Methods for doing this development planning include:

- Career coaching
- Individual development plans
- Goal-setting
- Action planning

Orgs leveraging these methods well tend to tie together development planning, performance, and the employee's and org's skills needs. While learning and skills platforms are making this more possible, it takes some insight on the part of talent leaders to align all the methods, as well as the motivations for using those methods.

Learning methods that enable employees to plan their careers tend to help employees gather info about skills or tactically plan their development.

Real-world thread: Digitizing the career development plan

Career development plans (CDPs)—also known as individual or personal development plans—are one method orgs use to link development planning, performance, and skills. Until relatively recently, though, CDPs tended to be manual, static, and paper-based: An employee filled out a form that listed their goals and planned development activities. The employee had to find development opportunities themselves, list those activities on the form, and update the form as activities were completed. All too often CDPs would be filed and forgotten because they quickly felt irrelevant.

Digitization can help address these challenges by automating pieces of the process and linking CDPs to systems that contain relevant info (e.g., HRIS, learning libraries, skills platforms).

For example, an American multinational tech company makes CDPs that incorporate skills assessments available to all employees. Employees can use the online CDP tool to:

- Self-assess their skills in an area they're interested in
- Ask their manager to verify the skills
- Receive recommendations for relevant learning opportunities to develop the skills
- Log activities they do to develop the skills

The CDP tool tracks the difference between current and desired skills and recommends learning paths to close the gaps, updating the recommendations as new activities are logged.[1]

Digitizing CDPs has 3 main benefits. First, it takes much of the paperwork burden off employees. Second, the automatically updated learning recommendations are far more relevant and useful to employees than a list they themselves created a year ago. And third, data from CDPs can give the org a dynamic picture of the workforce's current and projected future skills.

Career development plans are becoming more relevant, helpful, and dynamic as they are digitized and linked more closely to development, performance, and skills.

Helping employees Discover the right development

Discovery is a critical component of learning: it connects employees to the development (content and opportunities) they need. L&D functions should make it easy and intuitive for employees to find relevant learning opportunities.

It's a challenge that's only getting harder as the ocean of learning content and development opportunities gets bigger and bigger. In the past few years, L&D functions and vendors alike have tackled this discovery problem with a vengeance. Earlier this year we offered our take on making sense of the chaos of learning content.[2]

Here, we focus on how orgs are using learning methods to help employees discover learning opportunities more easily. Learning methods that enable discovery fall into 3 categories (shown in Figure 5):

- Centralized "push" communications
- Employee browsing / searching
- Recommendations

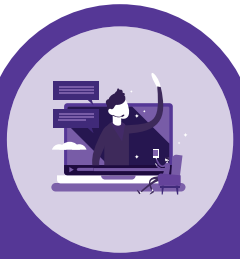
We discuss each in more depth below.

Centralized "push" communications

Almost all the leaders we talked to said that L&D functions rely on "push" communication methods to tell employees about available development opportunities.

Methods in this category include:

- Informational emails
- Newsletters highlighting offerings
- Nudges to explore or complete assigned training



Discover

CENTRALIZED "PUSH" COMMUNICATIONS
- Informational emails
- Newsletters
- Assigned / required training

EMPLOYEE BROWSING / SEARCHING
- On the internet
- On intranet
- In an LMS / LXP / platform

RECOMMENDATIONS
- Automated (e.g., from LXP or LMS)
- From senior leaders
- From manager
- From peers / colleagues

Figure 5: Methods for discovering development opportunities | Source: RedThread Research, 2021

The big pro of centralized "push" communication methods is that they can be easier to administer and automate. It is relatively easy to send mass emails to specific groups—for example, all new managers are sent a list of available courses, learning pathways, and articles that pertain to them. It's also getting easier, through technology, to personalize these communications at scale based on preferences or career paths.

Orgs are using increasingly scalable, automated methods to help employees find personalized, relevant development opportunities.

Employee browsing / searching

Employees can discover development opportunities on their own by searching or browsing. The "Netflix of Learning" movement relies heavily on employees knowing what they want to consume and how it may benefit their career. Methods in this category include:

- Searching or browsing on the internet
- Searching or browsing the org intranet
- Searching or browsing in an LMS, LXP, or other learning platform

A challenge with these methods is helping employees find development opportunities that are relevant to them. To tackle this problem, many orgs are implementing methods that rely on ratings and reviews to surface the best opportunities. We're also seeing methods that rely on artificial intelligence to parse massive amounts of text, audio, and video content to draw out themes, assign tags, and serve up highly relevant content.

Recommendations

Learning methods in the Recommend category personalize suggestions for development opportunities for each employee. Recommendations help employees quickly cut through the masses of learning content and opportunities to find something relevant to them. This category includes:

- Automated recommendations (learning platforms)
- Recommendations from managers
- Recommendations from colleagues / peers / social network

Initial, non-scientific observation tells us that employees may value certain types of recommendations over others, as the following example shows.

Real-world thread: Personalized recommendations to help employees discover

Different types of recommendations hold different value to employees—a fact that may influence leaders' choices about learning methods.

Matthew Daniel, a principal at Guild Education and former head of learning innovation and technology at Capital One Bank, once ran a test to see how employees relied on different types of recommendations for learning opportunities. The results were:

- Employees relied overwhelmingly on recommendations from a manager or teammate
- Recommendations from business executives were next
- Recommendations from the learning tech system or L&D team were dead last, because "What do they know about me?"

Daniel cautioned:

> *"Keep in mind that not all recommendations are made equal."*[3]
>
> *–Matthew Daniel, Principal, Guild Education*

Although Daniel's experiment was limited in size, it aligns with our own observations that the more personalized a recommendation, the higher value employees tend to give it. However, we expect to see more and more improvements in learning tech tools' ability to deeply personalize recommendations at scale. As leaders consider what learning methods to invest in, it's worth keeping in mind the value of these personalized recommendations.

Highly personalized recommendations are increasingly valued by employees.

A final note on methods for Discovery: Discovery has always been important, but it is becoming even more important in the wake of some of the social justice movements. Many orgs are realizing that their Discovery methods are inherently biased. Our work with orgs has surfaced 3 explicit ways this bias makes itself known:

- **Opportunities open to only a few.** As orgs make use of more learning methods, they should open those opportunities to as many as possible. One complaint we have heard over and over is that fairly inexpensive (or even, if scaled, free) learning opportunities are only open to some people in some parts of the org. Is there really any harm in opening up a basic accounting class to someone who is currently in supply chain?
- **Not making opportunities explicit.** Information within an org often flows through informal channels; many learning opportunities, like job rotations or special assignments, are open only to those who know about them. We have seen a recent push by orgs to explicitly state all opportunities so that everyone knows what's available.
- **Failing to take data into account.** Finally, data can help orgs understand who their message is reaching (or not). One org found that the majority of people taking advantage of an upskilling opportunity were white males, presumably because they had the most discretionary time. Data can help leaders understand how their messaging needs to change in order to provide opportunities to all.

L&D functions have quite a bit of power when it comes to Diversity, Equity, Inclusion, and Belonging (DEIB). Understanding the data with a focus on inclusivity can ensure that they wield that power for the good of the employees and the org as a whole.

One complaint we have heard over and over is that fairly inexpensive learning opportunities are only open to some people in some parts of the org.

Helping employees Consume relevant learning content

Enabling employees to consume content is where L&D functions have historically spent most of their time and energy. Creating and delivering training courses is a core L&D competency. Which is great: there will always be a place for courses.

What this research emphasizes, however, is that there's much, much more to employee development than courses alone—and L&D needs to expand its repertoire of learning methods accordingly.

Given L&D's historical focus, it is unsurprising that there's an abundance of methods that enable employees to consume learning. At their core, these methods aim to deliver relevant (and, ideally, personalized and timely) learning opportunities to employees. They fall into 3 categories (shown in Figure 6):

- Consuming in groups
- Consuming individually
- Interacting with content

Let's look at these categories in more detail, highlighting leading practices for each.

Consuming in groups

This category encompasses methods that orgs have traditionally thought of as "learning"—instructor-led courses that primarily "download" information from a teacher to a group of students. It also includes other methods that primarily rely on one-way flows of information to a group of people. Specifically, methods included in this category are:

- Instructor-led courses (virtual, in-person, hybrid)
- Town halls
- Live webinars

Consume

CONSUMING IN GROUPS
- Instructor-led courses
- Town halls
- Live webinars / webcasts

CONSUMING INDIVIDUALLY
- Self-paced online courses
- Books
- Articles / blogs
- Videos
- Podcasts
- User-generated content
- On-demand webinars / webcasts

INTERACTING WITH CONTENT
- Gamification
- Interactive apps
- Adaptive learning
- Nudges
- Bots

Figure 6: Methods for consuming learning | Source: RedThread Research, 2021

Because these methods are delivered in a prepared format to a large group of people, they don't allow for much personalization in terms of content or flow, and generally don't take into account (too much) individual needs or preferences.

Not surprisingly, the pandemic has motivated L&D functions to look for ways to mitigate the shortfalls of these methods. A whole category of tech that integrates with traditional meeting software has popped up to help prevent "Zoom fatigue" and make the online environment more engaging.

Some miss the mark dramatically (conducting meetings via Second Life? For reals?), but we applaud any attempt to engage participants through interactive elements, reflections, discussions, and the like.

There's an abundance of learning methods that enable employees to consume learning content—and L&D needs to expand its repertoire.

Consuming individually

Consuming content individually includes methods where employees receive "downloads" of information individually, at their own pace, and often, without the blessing of their L&D function. Methods in this category include:

- Self-paced online courses
- Books
- Articles / blogs
- Videos
- Podcasts
- User-generated content
- On-demand webinars

This list shows that orgs are taking content well beyond the simple course. For years, the e-learning course was the default for individual consumption—and there is still a place for it. But orgs are beginning to adapt to the way their employees want to learn, through curated articles and videos, podcasts, webinars, and books.

Some orgs provide access to these learning methods by adopting a next-gen LXP content aggregator to leverage machine learning and create a

"front door" from which all learning can be accessed. Others have built content directly into the work, providing access to information where it is most needed. Still others invest in digital or actual libraries to provide access to learning methods that appeal most to employees.

Interacting with content

Learning methods that encourage employees to interact with content add dimension to the experience; instead of being passive participants, employees become active ones, interacting with the content and / or each other. The methods included in this category are:

- Gamification
- Interactive apps
- Adaptive learning
- Nudges
- Bots

Leaders tell us that these methods can be a blessing or a curse, depending on how they're used. For example, apps can be seen as gimmicky or bothersome if used incorrectly. But with the right application and engagement, they can be really helpful. One leader said about a SMS-based learning app:

> *"An HR business partner in my org is using a texting app to develop new habits. It texts her a little bit of info every day. She told me recently, 'I didn't realize how much I've learned!'"*
>
> *–Kelly Rider, CLO, PTC*[4]

All of these learning methods are enabled by tech and share a potential shortcoming: they can be used as hammers in search of a nail. L&D functions should understand when these methods are most appropriate and utilize them accordingly.

With the right application and engagement, methods that encourage employees to interact with content can be very helpful by adding dimension to the learning experience.

Real-world thread: Implementing a system with little formal training

Professional services firm Deloitte US was launching a project to implement a new technology that would help improve processes in its audit and assurance business. Previous comparable system implementations had been accompanied by roughly 24 hours of classroom training, which created some challenges for employees who often faced huge separations (in terms of time and distance) between learning and actually using the new system.

Deloitte's US L&D team, headed by Eric Dingler, Chief Learning Officer, Deloitte LLP, decided to take a totally new, "minimal formal training" approach to onboarding employees to the new system. The team reduced the number of classroom training hours from 24 to 3 and ensured those 3 hours of training were delivered right before an employee started to use the new system.

They also developed over 175 learning assets that were delivered as popups as employees used the new system. The assets, which included videos and text, were based on skills (rather than roles) and aligned to employees' workflows. Many assets could be skipped if the employee already had the skill. They were regularly updated based on usage data.[5]

We liked this example because it so clearly demonstrates how a shift in methods can make learning more relevant, contextualized, and useful to employees, driving adoption of new behaviors.

Deloitte LLC's shift in learning methods made learning more relevant, contextualized, and useful to employees.

Helping employees Experiment with new knowledge and skills

A well-established and growing body of research points to the importance of experimentation, failure, and reflection in learning.[6] The more opportunities employees have to try new skills in realistic environments and then reflect on their mistakes, the better.

The methods we saw that help employees experiment with new knowledge and skills fell roughly into 2 categories (shown in Figure 7):

- Experimenting within learning experiences
- Experimenting on the job

Experimenting is a behavior where the L&D function doesn't have complete control. For example, they can purposely build reflection exercises and role plays into the stuff they create, but they can't ensure managers help employees learn from mistakes on the job—they can only prepare managers to do so.

This means that helping employees experiment is more about putting the right learning methods, systems, and processes in place so that experimentation is as easy and natural as possible.

Experimentation within learning experiences

When L&D functions think about enabling experimenting, they usually go straight to experimentation within a planned learning experience. Which is not surprising, nor is it wrong.

L&D functions can have quite a bit of sway in helping employees use new knowledge and skills. A phrase we hear a lot is "experimenting in a safe place." This generally includes methods like:

- Sandboxes
- Simulations
- Role plays

Experiment

EXPERIMENTING WITHIN LEARNING

- Sandboxes
- Simulations
- Role plays
- AR / VR / immersive 3D
- Reflection activities

EXPERIMENTING ON THE JOB

- Job rotations
- Talent / "gig" marketplaces
- Volunteering outside work
- Stretch assignments
- Job shadowing
- Reflection activities

Figure 7: Methods for experimenting with new skills | Source: RedThread Research, 2021

- AR / VR / immersive 3D
- Reflection activities

In each of these instances, employees are given the opportunity to try out their new knowledge in low-risk situations. These types of methods are excellent in situations (and cultures) where mistakes have large consequences, whether those consequences are perceived or real.

Some of the situations where these methods may be the most appropriate option include:

- Realistic simulations that take participants through catastrophic failure scenarios or scenarios that would be physically dangerous in real life (e.g., nuclear power plants, active shooter scenarios)
- Role plays that help new managers learn how to give appropriate, non-biased feedback
- Use of AR / VR to help employees get over their fear of public speaking, or as part of a DEIB training to build empathy

These experimentation methods tend to be a bit more costly than many other methods, and this is where we caution L&D leaders to use some discretion: Many we spoke to are enamored with the idea of AR / VR, for example, but just because it can be used in a situation doesn't mean it should be.

Experimenting on the job

The methods that fall in this category are some of our favorites—and for good reason. We've long been proponents of defaulting to the work first to teach new knowledge and skills. This means that L&D functions should think about developing skills in the context of the work and try to build opportunities into the flow rather than defaulting to learning activities that would take employees out of their job, and therefore out of context. Methods that fall in this category include:

- Job rotations
- Talent / gig marketplaces
- Volunteering outside of work

L&D functions should put in place learning methods, systems, and processes to make experimentation easier and more natural.

- Stretch assignments
- Job shadowing
- Reflection activities

Most of L&Ddom understands that these methods are effective. Why, then, are they not used more? We think it comes down to the fact that the L&D function often doesn't "own" them. They don't have direct control over the systems that determine job rotations or stretch assignments, for example.

L&D functions often don't "own" the systems that determine job rotations or stretch assignments—but that's changing.

That is changing. In many orgs, for example, the L&D function is one of the strongest proponents of a talent or gig marketplace. They see these marketplaces as a way not just to build new skills and knowledge, but also to collect information about those skills and knowledge, helping the L&D function to determine where the greatest need is.

L&D functions are also being included in larger discussions about talent development in general. Performance, engagement, mobility, and employee development are becoming one conversation instead of 4, making it easier to influence how and if these methods are leveraged.

For L&D functions that aren't yet included in those discussions, we strongly recommend finding a way to be included. One leader we spoke to invited himself to important meetings about talent. Another used her influence to build relationships with her peers in other HR practices so that these methods could be included in the overall development strategy.

Real-world thread: Enabling employees to experiment through job rotations

The L&D function at Boston-based software company PTC is a strong proponent of job rotations to develop employee skills.

PTC's early-in-career rotational program, which moves junior employees through various business functions over the course of 2 years, has been highly successful, with 100% retention of employees who participate. Similarly, the HR function rotates employees across the various HR teams.

These programs offer 2 main benefits. First, employees get to practice new skills in real work environments, giving them context for the things they're learning. Second, PTC is building a more agile and resilient workforce by developing employees with transferable, cross-functional skills.

Kelly Rider, CLO at PTC, said:

> *"We're more agile now because we can say, for example, 'Oh, this person has skills in recruiting. Let's pull them over to this project that needs those skills.'"*[7]
>
> *–Kelly Rider, CLO, PTC*

As leaders consider which methods to invest in and how to message their decisions to managers and employees, it's worth remembering that these on-the-job experimentation methods benefit both employees and the entire org.

On-the-job experimentation methods benefit both employees and the entire org.

Helping employees Connect with each other for learning

Also known as "social learning," methods that connect employees to each other for purposes of sharing knowledge and developing skills are already in many L&D functions' quivers. L&D functions have long been interested in these methods and have tried to codify and formalize them for years.

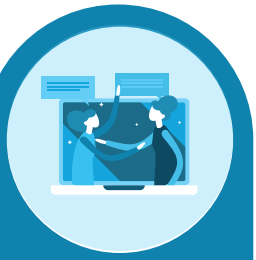
Tech platforms have been developed to aid in this socialization, but connections often happen more organically: one employee asks her colleague how to do something; other employees attend conferences together, tend to their social media channels, or seek out a mentor.

The L&D function's role in helping people connect has as much to do with building cultures that encourage sharing as it does with formal processes or tech. For example, coaching has seen a revival in recent years, and is an important formal way to help people connect for learning. Equally important is normalizing virtual collaboration channels, such as Teams or Slack, as ways to collect and share information that could be useful more broadly.

As with some methods for experimentation, L&D functions often do not own a lot of the methods that enable employees to connect. Rather than trying to control these efforts, we're seeing L&D functions reach out, partner with other functions, and focus on convening people and amplifying what's good.

For example, a handful of leaders in different orgs gave us the specific example of mentoring programs. Rather than creating mentoring programs themselves, they're codifying and sharing info about what's working in some pockets of the org so people who are interested in starting mentoring programs in other areas don't have to reinvent the wheel.

Interestingly, as the pandemic forced many employees into their homes and away from face-to-face work interactions, the value of true human connection skyrocketed.8 This theme showed up as strongly in learning methods as it did in other areas of work: in the roundtable we held as part of this research, a significant portion of the discussion was dedicated to



Connect

CONNECTING 1:1
- Mentoring
- Coaching
- Leader as teacher
- Expert directories

CONNECTING GROUPS
- Team-based training / coaching
- Employee resource groups (ERGs)
- Virtual collab. channels (e.g., Teams, Slack)
- Communities of practice
- Knowledge sessions (e.g., lunch & learns)
- Book clubs
- Discussion forums

CONNECTING TO THE OUTSIDE
- Conferences
- Professional organizations
- Professional / personal networks

Figure 8: Methods for connecting to learn from each other | Source: RedThread Research, 2021

how L&D functions can invest in learning methods that foster meaningful connections between employees.[9]

Methods that help employees connect for learning fall into 3 categories (shown in Figure 8):

- Connecting 1:1
- Connecting groups
- Connecting to the outside

Let's discuss these categories in more detail.

Connecting 1:1

It's not surprising that employees connect 1:1 to learn—one of the easiest ways to find something out at work is to walk down the hall and ask a colleague (or, these days, send them a Slack or Teams chat). It's hard to beat the level of personalization and contextualization that comes with a 1:1 conversation with someone who's been there, done that.

L&D functions have some options when it comes to connecting people 1:1. The methods we ran across in this study include:

- Coaching
- Mentoring
- Leader as teacher
- Expert directories

All of these methods can happen with or without the involvement of the L&D function. Many employees find their own coaches, mentors, and experts who can help them develop the knowledge and skills they need for their career.

For years, L&D functions have tried to provide a more systematic and scalable approach to these methods to ensure that those who need or want this type of experience get it. This is increasingly important as orgs

The L&D function can help people connect by focusing on convening people, amplifying what's good, and creating a culture that encourages connection.

are being scrutinized by their boards and by the public for their efforts to provide equitable access to development opportunities and advancement.

Recently, there has been an uptick in the use of these methods, particularly coaching. Orgs have many creative ways to scale these 1:1 connections. You can read about them in the final report of our recent coaching study.[10]

Connecting groups

As orgs adopt more team-oriented workstyles and compensate and judge team performance accordingly, it makes sense that employees would also connect more as groups for learning. Methods for connecting groups for learning that we identified from our research include:

- Employee resource groups (ERGs)
- Communities of practice
- Virtual collaboration (Slack, Teams, etc.)
- Team coaching / training
- Knowledge sessions (e.g., brown bag lunches)
- Discussion forums
- Book clubs

While L&D functions may not have direct responsibility for all the methods listed above, they can either influence their usage or leverage them for learning purposes.

L&D functions likely own methods like team coaching and knowledge sessions and can therefore structure them in ways most beneficial to the learning goals of the org. Leaders said they're experimenting more and more with group-based development because it does 2 things at once: it fosters human connection among group members and enables employees to practice new skills with the people they'll be using those skills with on the job.

L&D functions may not be the sole owner of ERGs and communities of practice, but they can influence them by helping to craft charters

Group-based development both fosters human connection and enables employees to practice new skills with the people they'll be using those skills with on the job.

and training leaders, and they can leverage them to develop necessary skills and awareness in those taking part—DEIB awareness or wellness, for example. Participants can also be tapped to help L&D functions understand where the development needs are and, in some cases, help develop the content.

One learning leader told us that convening groups across the org is a key way his team supports connection at scale. His org has a strong culture of building communities of practice that connect people across disciplines to share templates, best practices, and insights.[11] The central learning team leverages this culture (remember that trend of building on what already exists?) to connect groups for learning.

Connecting to the outside

Finally, orgs use methods that connect employees to people and ideas outside of their own walls. This category focuses on ensuring employees have the external connections they need to be successful, both in their current roles and in their long-term careers. With so much change in almost every industry and function, both orgs and employees benefit when people are able to forge connections outside the org. The methods in this category include:

- Industry conferences
- Professional organizations
- Professional / personal networks

With so much change in almost every industry and function, both orgs and employees benefit when people are able to forge connections outside the org.

While these methods are sometimes seen as the responsibility of the individual employee, we think that L&D functions should invest to enable them, as they yield pretty large benefits to orgs:

Development opportunities

It's a (true) cliché that who you know influences what jobs you get; it's also true that who you know influences the development opportunities you're able to secure. Our research earlier this year on skills and internal mobility both revealed that employees' personal and professional networks strongly influence the opportunities they find out about and have access

to.[12] Enabling all employees to build these relationships is a critical task for L&D functions.

Bringing outside info in

We've worked with a number of orgs this year who've talked about the need to "look up and around"—to stay current on trends, leading thinking, and leading practices in a fast-changing environment. Enabling employees to connect to the outside is one way to do this.

Developing interpersonal and networking skills

Networking is an increasingly important skill. Because one person cannot know everything, orgs should enable employees to know the people who know all the things. Conferences, professional organizations, and building professional and personal networks are key. In some industries, such as consulting or sales or politics, a good network is crucial to good performance.

While methods to bring the outside in may often be seen as the responsibility of employees, we think orgs should invest in them because they benefit the org, too.

Real-world thread: Supporting employees to connect for learning

We mentioned above that orgs are finding lots of ways to systematize and scale 1:1 connections. One way they're doing this is by focusing on sharing info, providing guidance that applies to the whole org, and highlighting leading practices.

An org that's doing this well is a large US insurance company which supports a variety of mentoring initiatives. The central L&D team understands that in an org of 60,000 employees, different business areas have different ways of doing things and that sometimes employees find mentoring opportunities on their own—and that's a good thing.

Kaitlyn M., formerly a learning leader at this company, said:

> *"Mentoring happens in the community, at centers of worship, at connections from other companies. Those aren't things our company can control, nor should we."*
>
> *–Kaitlyn M., former learning leader, large US insurance company*

Accordingly, the central L&D team focuses on providing enterprise-wide guidance and sharing leading practices about mentoring in the company. They disseminate answers to questions like:

- What's cutting-edge in mentoring?
- What's the definition of mentoring at State Farm?
- What are the qualities of a good mentor?
- How long should mentoring relationships last?

The central L&D team intentionally looks for answers to these questions inside as well as outside the org. An analyst on the L&D team does research within the org to identify which groups are doing mentoring well. The team then works to formalize and scale these leading practices as enterprise guidance.[13]

Focusing on org-wide guidance and sharing what's already working strikes us as a highly effective and efficient way of fostering connections at scale.

Helping employees Perform better on the job

L&D functions should be helping employees learn on the job and perform better while doing it. Performance support has long been part of the L&D repertoire—think standard operating procedures and other methods that attempt to make task performance as predictable and standardized as possible. But there's more to it than that.

We're seeing new ways of enabling learning-while-performing in 3 key areas:

Pushing data down

More orgs are enabling employees to access data about their own learning and performance. Data, such as customer feedback, sales numbers, performance reviews, and learning strengths are shared with managers and the employees themselves because orgs are recognizing that the employee is the person best equipped and most motivated to act upon it.

Leveraging employee knowledge

In keeping with the trend toward user-generated content, leaders said they've started to invite employees to take a more active role in creating and updating documents related to performance support (such as job aids).

Culture of feedback

Historically, feedback has been given from manager to employee, and in some rare, formal cases, from employee to manager via 360 (or formal complaint to the HR department). However, many orgs are actively looking for ways to make feedback a part of the culture. More on this below.

Methods that enable employees to perform better on the job and learn while doing it fall into 3 categories (shown in figure 9):

Perform

INSTRUCTIONS
- Job aids
- Standard operating procedures
- Job safety analysis

COLLABORATION SPACES
- Wikis
- Shared files

FEEDBACK
- After-action reviews
- Performance statistics (e.g., sales revenue)
- Customer feedback
- Manager feedback
- Peer feedback

Figure 9: Methods for performing | Source: RedThread Research, 2021

- Instructions
- Collaboration spaces
- Feedback

Let's discuss these categories in more detail.

Instructions

For about a century, one of L&D's primary roles has been to help employees perform certain tasks as similarly as possible. Efficiency, standardization, and predictability were the name of the game—think manufacturing. The instructions category reflects that history, and is all about providing employees with detailed descriptions of how to perform critical tasks in their role. Methods in this category include:

- Job aids
- Standard operating procedures
- Job safety analysis

But there have been some exciting developments in recent years, moving these established methods into the 21st century. Newer approaches to these methods include ways to involve employees in creating and updating the information. People who have done the job are often responsible for updating the documents, reflecting a belief that learning doesn't need to be prescriptive or from a centralized source—it can be more helpful "from the horse's mouth."

Collaboration spaces

If the instructions category is fairly set—"this is how this job is done"—then methods in the collaboration spaces category are more fluid. They're about creating places for employees to share their knowledge on a topic, update that knowledge as needed, and easily access the knowledge from inside their work. These methods work best, of course, when they're well-organized or easily searchable so people can find what they're looking for.

Orgs are experimenting with learning methods that push performance data down to the individual—the person best equipped and most motivated to do something with it.

Methods in this category include:

- Wikis
- Shared files

In many cases, L&D functions do not own the sources of information for these methods: someone closer to the work does. L&D's role therefore becomes about providing visibility and accessibility to content, not necessarily creating or monitoring that content.

Because they don't own the sources or the content, L&D functions often need to work with other HR functions or the business function to make sure employees have the needed visibility and access.

Feedback

Learning methods in the feedback category give concrete and actionable information to employees about how they're doing and how they can improve. This is one of our favorite categories, since it can so strongly enable a learning culture.

Feedback gives concrete and actionable information to employees about how they're doing and how they can improve.

Methods in this category include:

- After-action reviews
- Performance statistics (e.g., sales revenue)
- Feedback from customers, managers, and peers

L&D functions often hit this category indirectly: they don't have direct control over the feedback people give one another, but can influence how those people learn (e.g., they can't determine if managers are going to provide feedback, but they are responsible for what managers learn about when and how to give good feedback). They also can help employees seek feedback, which just makes the situation better all around.

Feedback can be tech-enabled or not. On the tech-enabled end of the spectrum, a lot can be done by putting actionable data directly into employees' hands. For example, one vendor we talked with showed us their tech platform, which sends customer ratings and reviews to call center reps within minutes of a service call—allowing the employee to adjust efforts in time for the very next call.

On the less tech-enabled end of the spectrum, we've heard a lot about working with other functions to build feedback into processes, as in the after-action review example below.

Real-world thread: Creating a culture of feedback

An L&D function can't create a culture of feedback alone. But they can influence the culture by working with other functions to implement systems and processes that make feedback part of the way business is done.

The US Navy SEALs have embedded feedback deeply into their culture, partly through the use of their famous After-Action Reviews (AARs). In an AAR, all members of a SEAL team gather immediately after a mission or training session to break down the event in detail. They ask:

- What went wrong?
- What did each person do, and why did they do it?
- What will we do differently next time?

The candid feedback team members deliver to one another in AARs is often uncomfortable, but it's considered an essential part of how the team gets better.[14]

We've implemented AARs in our teams at RedThread and have found enormous benefit in the structured ways they help us learn from mistakes and improve our work. We'd encourage leaders to consider this and other methods of embedding feedback—first in the L&D function itself and moving out from there.

The candid feedback team members deliver to one another in after-action reviews is often uncomfortable, but it's an essential part of how a team gets better.

All the methods

There you have it: The dozens of learning methods we've found, the categories they fall into, and the 6 behaviors they can enable (Plan, Discover, Consume, Experiment, Connect, and Perform). It's a lot—a lot of methods, and a lot of ways they can each be used.

Not all orgs need all learning methods, of course. But L&D functions do need to think about whether they are appropriately supporting each behavior, and whether they have the right mix of methods to enable their employees to build the skills that serve the org's strategy.

One learning leader, whose team focuses on enabling external customer learning, described her org's thought process this way:

> *"We think about the customer's learning journey and the different methods that are required at every single point. What methods drive discoverability? Adoption? And so on."*
>
> *– Learning Alliances Manager, global tech company*[15]

With a clearer understanding of what learning methods are available and how the Employee Development Framework can be used to conceptually organize those methods, let's turn to the question of what methods might be best for your org—and how to decide.

L&D functions need to think about whether they are appropriately supporting each of the 6 behaviors (Plan, Discover, etc.), and whether they have the right mix of methods to enable their employees to build the skills that serve the org's strategy.

The right methods in the right combinations

So far, we have reviewed the Employee Development Framework and identified several dozen learning methods that can enable each of its behaviors. Just having a (fairly) comprehensive list of learning methods can help L&D functions begin to think beyond the course and introduce, recognize, or support other ways of learning in the org.

However, as most L&D leaders understand, having information and knowing what to do with it are 2 different things. In our conversations, we heard of 5 innovative ways leaders are deciding which methods work best for their orgs:

- Understand the messages your methods send
- Experiment, iterate, push boundaries
- Design bike paths, not buses
- Squirrel!: Don't get distracted
- Let go of what's not working

Note that none of these 5 approaches indicates a one-and-done decision. Instead, "deciding" on the right learning methods in the right combinations is an ongoing process of experimentation and improvement, trial and error. Let's look at each of the 5 approaches to deciding on learning methods in more detail.

Deciding on the right learning methods is an ongoing process of experimentation and iteration.

Understand the messages your methods send

We heard a consistent refrain from leaders in this research: know your audience. We'd expand this sentiment to: know your culture, and know the culture you want to create. The decisions L&D functions make about learning methods strongly shape how learning happens in the org. That means those decisions need to both fit the current ways learning happens and nudge the org in the direction of the learning culture your org wants to have (or further in that direction, if you're already on the way).

For example, a business services org we have worked with was heavily relationship-oriented. That feature was a strength of the culture, and one the L&D function wanted to support and enhance. Instead of drowning their employees in a sea of e-learning courses, they focused on events, both live and virtual, coaching, and using leaders as teachers.

When it comes to deciding on learning methods, the saying, "actions speak louder than words" is true. L&D leaders should think carefully about what their learning methods "say" to the org, because those messages help nudge the org toward or away from the culture the org wants to create.

Here are a few examples of intentional or unintentional messages sent by chosen learning methods.

Figure 10: Examples of messages sent by chosen learning methods

METHOD	MESSAGE
Mandatory individual development plans	An org that institutes individual development plans (IDPs) for all employees and makes them easy to access and linked to learning opportunities and performance data might send the message that, "We continuously develop at this company. We want and expect you to develop while you're here."
Locked-down courses	Many orgs have some development opportunities that are limited to certain groups or types of employees. Making those opportunities visible to all, but available to only a few, might send the message that, "This opportunity is only for special people (and you're not special)."
Coaching for all	An org that actively implements various types of coaching, at least some of which are open to all employees, might send the message that, "We are investing in you. We care about everyone's development, including yours."
Job rotations	Orgs that implement job rotation programs and market them widely internally (as opposed to programs that exist but remain largely unknown and unused) might send the message that, "Mobility is important to us. It's important for you to get exposure to other areas of the org."
Conferences	Orgs that invest in sending employees to conferences on a regular basis might send the message that, "We're interested in your gaining outside perspectives." Orgs that also encourage employees to present at conferences send the message that, "We want you to be seen as an expert in this area."
After-action reviews	Orgs that use after-action reviews as a part of how they operate might send the message that, "We learn from our mistakes."

Source: RedThread Research, 2021

These are just a few of the potential messages these learning methods might send. Bear in mind that whatever methods you decide on are going to send a message. We encourage leaders to think carefully about what those messages might be and whether they will nudge the org in the direction you want.

Experiment, iterate, and push boundaries

Given how traditionally many L&D functions say they operate, we were pleasantly surprised at the extent to which leaders said they take an iterative approach to learning methods. They try new methods, or new approaches to existing methods. They see what works and improve over time.

Leaders should experiment, see what works, assess what doesn't, and improve over time.

This iteration mindset—and it is a mindset—takes conscious effort to embed into the org. Leaders said they make a point to celebrate failures as well as successes, highlighting failures as opportunities for learning. They also work hard to build a sense of community and psychological safety so that all L&D team members feel encouraged to try new things.

Another way leaders encourage experimentation and iteration within the L&D function is by thinking about learning as a product. They think in terms of a product development cycle: discovery / understanding needs, developing a minimum viable product, piloting and testing, and so on.

And like good product developers, the L&D function shouldn't be just an order-taker that simply caters to the current needs and desires of employees or other business functions. Instead, L&D functions have a responsibility to help the org and its employees continually develop. That sometimes means gently helping people step outside their comfort zones by painting a picture of what the future might look like and how they will benefit from that future.

Leaders in this area also obsessively use data and feedback to inform experiments. One leader placed trackers on different pages in a new learning portal and used A/B testing to see which pages were most effective. Others pay close attention to the comments and reviews from employees in their learning systems and adjust based on that feedback.

Real-world thread: Pushing boundaries

L&D leaders can use data to push boundaries. At a Fortune 100 manufacturing org, a new method for cybersecurity training was making some people uncomfortable. The L&D function was able to use data to help people see that it was working.

In early 2021, the central L&D team paired with the IT group's cybersecurity team and business functions to launch a cybersecurity training. The training sent mock phishing emails to employees, tracked how they handled the mock emails, and recommended follow-on training opportunities in the L&D org's learning tech platform. The learning tech platform also captured employee comments on the training.

After sending the mock emails, the IT group received about 30 emails (including from one very senior leader) criticizing the training. However, the mock email campaign also received about 300 positive comments in the learning tech platform, and many leaders began sharing the recommended training with their teams.

The central L&D team was able to look at the data and fully contextualize those 30 criticisms against everything else that was going on.

The CLO said:

> *"All this goodness was happening, and we were able to package all the data to show the full picture to our partners in IT and our senior leaders. That was an early example of not freaking out about something new because we had the data to show it was working."*[16]
>
> *–CLO, Fortune 100 manufacturing org*

This focus on data and feedback can help make the case for new approaches that might otherwise be overcome by org inertia or resistance.

Design bike paths, not buses

We love the following analogy from Eric Dingler, CLO, Deloitte US. Eric shared this analogy to illustrate how L&D functions have historically used inflexible, course-focused learning methods:

> *"L&D is great at designing buses. We need to get better at designing bicycle paths. Not 1 million paths, sure, but a lot more than 1 per year per level."*[17]
>
> *–Eric Dingler, CLO, Deloitte US*

Buses accommodate a big group of people but are inflexible in their seating, their route, their destination, and their stops. They're designed to efficiently get a number of people with the same general need to a place relatively close to their final destination.

Bike paths, on the other hand, may lead to the same destination, but accommodate slower riders or professional cyclists, those out for a Sunday roll or those in a race. People can ride together, but don't have to. Parents can teach kids to ride on their own along the way. Everyone can stop for some ice cream, and some can even get off the path for a while.

Eric is in favor of methods that act more like bike paths. At Deloitte, he and his team are building learning opportunities that are more flexible and therefore easier for each individual employee to use in ways that work for them: employees can jump on a path whenever they want, proceed at their own pace, and jump off when they're at their "destination" or need a break.

Note that the analogy doesn't imply pure chaos or lack of structure. Indeed, L&D functions should still provide a lot of structure to ensure employees get where they need to go. The key seems to be creating systems that allow for flexibility within that structure.

We heard similar sentiments from other leaders when describing their attempts to enable flexibility within structure. One put it this way:

> *"It's necessary to provide enough structure so that experimentation happens organically. So that it feels easy and effortless."*
>
> *–Ryan Cozens, L&D Lead, Well Health*[18]

This type of flexibility benefits more than just the employee. Orgs using "bike paths" can respond more quickly to disruption—changes in strategy or worldwide pandemics, say. They also have more data because they have

Learning methods that are more like bike paths accommodate different types of riders with different needs, styles, and destinations.

more employee touch points and can therefore better understand what skills they have and where they should focus their development efforts. And they can more easily experiment with new methods and change things that aren't working without a huge investment of effort, time, or money.

How are leaders going about building flexibility within structure? The exact approaches vary from company to company, but 3 common themes emerged.

Modularity

If flexibility is the goal, then it makes sense to make learning opportunities more modular so they can be switched around, combined, or removed as needed. This movement toward modularity applies to learning content, sure, but also to the ways learning opportunities are pieced together.

For example, if an org wants all employees to have data analytics as a skill, traditionally they might have sent all employees through the same course. However, if they're thinking in terms of modularity, they may combine many learning methods to meet the employees wherever they are.

A financial analyst may just need to verify that she already has the necessary skills. An engineer may find he needs a few refresher videos and a practice exercise. And an artist may discover that she benefits from all of the modularized videos, all of the practice assignments, and verification that she has the necessary skill.

Orgs are building "bike paths" (flexibility within structure) by making learning methods more modular, integrated with the work, and skills-based.

Integrated with the work

Leaders also told us that they were trying to integrate the learning with the work as much as possible. This meant different things to different leaders. Those new to the idea focused on "bite-sized" bits of learning that could be easily integrated. Those with more experience were utilizing methods in Experiment, Perform, and Connect, specifically, to use the work as much as possible as the main learning tool.

Skills-based

Most of the leaders we talked to are adopting a skills-based approach to learning methods. The granularity of skills makes it much easier to

assemble, break down, and reassemble learning methods, and to set up "create-your-own-journey" learning paths for employees. L&D's role in this case is to clearly tie methods and content to skills, and to provide assembly instructions for those building their own paths.

Squirrel!: Don't get distracted

From both the roundtable and our interviews, leaders told us that the first criterion for selecting learning methods should be that the development helps to solve a business challenge. We love this, and we absolutely think it should be applied to learning method decisions.

Knowing the L&D space like we do, and also understanding L&D's propensity for research and love of tech, we want to point out an obvious but maybe painful truth about this group: we like shiny things. We like new, and we're constantly looking for things that can help us do what we do (and therefore help employees do what they do) better / faster / shinier.

That said, the well-grounded leaders in our roundtable pointed out that the methods you select should solve a challenge the org is having. While methods don't tie directly to business challenges (you can use several to solve the same challenge), we agree that a focus on the org, not just the employees and their experience, is key when choosing methods.

The methods you select should solve a challenge the org is having. A focus on the org, not just employees and their experience, is key.

In this study, leaders mentioned 3 questions they ask themselves when considering a new method for their org to keep themselves from getting distracted.

Does the method make financial sense?

There are lots of sexy learning methods out there, and all of them cost money. Leaders spoke not just of finding the budget or justifying the cost, but actually analyzing the method financially to determine whether it made sense for the problem it was meant to solve, including internal resources that will be needed to implement, coordinate, and service it.

Does the method work for the intended audience?

We heard a lot from leaders about the need to know your audience. They ask questions like: Are the methods likely to achieve the goal, given the audience's needs and preferences? For example, the needs and constraints

of an office worker are quite different than the needs and constraints of a manufacturing supervisor. Understanding those differences and choosing methods that work well for them is pretty important when enabling their development.

Does the method work with your org's tech stacks?

Finally, leaders talked about their org's tech stack—both leveraging what is currently there and implementing new methods with tech components. Two areas they mentioned specifically were user experience (did this align with what learning meant in the org?) and data (how would this data be passed to other tech or stored in a data lake?).

If the answer was yes to all of these questions, leaders were more comfortable implementing—or even just experimenting with—the method in question.

Let go of what's not working

Leaders told us that the first thing to do when a method isn't working is to figure out why. Sometimes a quick tweak, more communication, or better visibility can increase engagement and value to the org. Sometimes it can't. Sometimes things just die. And sometimes you have to cut them loose.

Sometimes things just die. And sometimes you have to kill them.

Saying goodbye

Letting things die is often a challenge for L&D functions. Candidly, there's an emotional aspect to letting go. L&D teams often work hard to create learning methods that are often successful for a time. Or they work hard on things that just flop. In either case, there can be natural resistance to letting go of methods that no longer work. But as one leader said:

> *"The world is changing. Don't get attached to a learning method. If it works, great. If not, move on and find something that works better."*
>
> *– Jeffrey Mills, Manager, Org Learning & Development, QSC*[19]

More tactically, the leaders we spoke with revealed 3 enlightening ways to make it easier for their L&D functions and L&D professionals to let go of what's not working.

Make methods disposable

Some leaders consider all learning methods as disposable or having a short shelf life. Everything has a life cycle, they said, which means it's natural for things that no longer work to be pulled out of the system.

This is akin to hand-making valentines. You put a lot of effort in them to benefit someone, but you know they're likely going to appreciate it (or not) and then toss it on February 15. By having a mindset of disposability, L&D leaders and their teams can make more rational decisions about what to invest in and what not to invest in, both originally and on an ongoing basis.

Implement the strategic pause

Sometimes it can help to simply put time and distance between the realization that something isn't working and the final act of letting go. One leader said:

> *"If something isn't working, we'll do a 'strategic pause.' We stop providing the program and evaluate if it's really needed. If so, we rework the offering. If not, we find a way to offboard it."*[20]
>
> *–Roundtable participant, Oct 2021*

Delegate the decision to the business function

In orgs that use a charge-back system (business functions contract with a central L&D function to create a learning initiative), L&D leaders can leave the keep / toss decision to the business function. If a program or a piece of content continues to be useful, the business function keeps it alive. If not, they let it go.

Cutting them loose

In some instances, L&D functions may take a more proactive approach to getting rid of learning methods. In such cases, the killing is planned as a part of the method's implementation. Orgs focusing on skills, for example, understand that the learning methods, the data, and the tech associated with teaching skills that they're using in this moment are not the ones they will be using in 3 years—and maybe not even in 6 months.

Tech, data, and methods continue to get better. So rather than just thinking of certain methods as disposable, it's important to *make* them disposable. One leader mentioned 2 main ideas.

Some L&D functions find ways to let go of learning methods that don't work. Others take a more proactive approach.

First, contracts with vendors of all sorts should get shorter. Large learning tech implementations are sometimes 10 years long, which gives plenty of time to implement the tech, work out the bugs, see the benefits, and then ride the wave for a while. However, if your org knows it will be jumping to something better as soon as it's available, contracts need to be negotiated with shorter terms.

Second, there has to be an exit strategy. As learning tech gets more sophisticated, it becomes more integrated into an org's tech stack, and more data flows into and out of the system. When an org plans to kill a method or tech, it needs a plan in place for what happens with those integrations and, even more importantly, that data.

We love the idea of building an exit strategy into the implementation of learning methods. Although it doesn't apply to all methods, it ensures that when it's critical, methods won't outstay their welcome.

Building an exit strategy into the implementation of learning methods ensures that they won't outstay their welcome.

Real-world thread: Letting go of what's not working

When it becomes clear that a learning method isn't working, the right course of action is sometimes to ditch it in favor of something that does work.

That's what happened at NASCO, a healthcare tech company. A customer-facing learning program initially created a full user guide to help customers use a NASCO product. As the Workforce Readiness Solutions team watched customer usage, they realized customers weren't using the guide. Instead, customers were capturing video snippets and using them to train employees on the product.

The NASCO team used that data to adjust their efforts. They started releasing short video snippets, eventually replacing the full user guide with video snippets as a part of the customer's knowledge management solution.

We loved NASCO's willingness to let go of a product they'd devoted a lot of time to, and pivot to ensure their learning methods were as useful to their customers as possible.

Wrapping up

Although most of the learning methods we've covered in this report have been around for a while, the ways they're being used in many orgs are quite innovative. The 6 behaviors in the Employee Development Framework offer a way to understand what learning methods are available and how they can be used to enable different learning behaviors—making it easier to assess whether an org has the right methods, in the right combinations, for their goals.

We expect to see more orgs taking a broader approach to learning methods in the future, because leaders see the value in the flexibility and personalization such approaches offer in the new and changing business climate. We look forward to seeing how that approach works and continues to evolve.

Appendix 1: Methodology

We launched our study in the fall of 2021. This report gathers and synthesizes findings from our research efforts, which include:

- A review of 60+ articles, podcasts, videos, and books from business, trade, and popular literature sources
- 1 roundtable with 28 participants
- 14 in-depth interviews with leaders on learning methods

For those looking for more info on this topic, you're in luck: We have a policy of sharing as much information as possible throughout the research process. Please see these articles on our website:

- Premise: Choosing the right development opportunities for your employees
- Next-Gen Learning Methods: Literature Insights
- Roundtable readout: Choosing, evaluating, and offboarding learning methods

Appendix 2: Authors & Contributors

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Heather is a senior analyst at RedThread Research. Trained in conflict resolution and organizational development, Heather has spent the past ten years in various capacities at organizational culture and mindset change consultancies as well as the U.S. Department of the Treasury. She holds a masters degree in international affairs from Columbia University and a bachelors degree in history from Princeton University. She has lived in Germany, China, Japan, and India and was, for one summer, a wrangler on a dude ranch in Colorado.

Dani Johnson

Co-Founder & Principal Analyst

Dani has spent the majority of her career writing about, conducting research in, and consulting on human capital practices and technology. Before starting RedThread, Dani led the Learning and Career research practice at Bersin, Deloitte. Her ideas can be found in publications such as *The Wall Street Journal*, *CLO Magazine*, *HR Magazine*, and *Employment Relations*. Dani holds a Master of Business Administration, and a Master of Science and Bachelor of Science degrees in Mechanical Engineering from Brigham Young University.

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Endnotes

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