2020 Report: Learning during the Global Crisis

How L&D departments are navigating their workforce through the COVID-19 pandemic

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Introduction

Does learning stop during a global crisis? No. Does it look different? Oh yes.

By the end of March 2020, the world looked different than just a few short weeks earlier. The full impact of COVID-19 was becoming clear for many and businesses and governments all over the world reacted to what became a global crisis.

The COVID-19 pandemic caused border shutdowns, closed businesses, and forced office workers to work remotely. During the crisis, L&D leaders reexamined their strategies. In-person learning was no longer a viable option. Workers still needed development, but it needed to be done according to a new, virtual normal. For years, there's been talk of digital disruption affecting L&D; the COVID-19 pandemic ushered in a new reality for many.

How organizations addressed (or ignored) learning during the crisis differed from company to company. Some seamlessly pivoted their training, while others struggled to find the right mix. Some organizations were already dispersed, making new transitions unnecessary. Others deprioritized learning for a time more conductive to learning that aligned more to the culture.

One thing is certain: after the events of 2020, the Learning space will never be the same again.

In this report, we examine how L&D leaders responded to the COVID-19 pandemic in the spring and early summer of 2020. Specifically, we explore the following:

1. How did L&D leaders prepare their teams for work disruption due to COVID-19?

2. What does Learning look like during a global pandemic?

3. How did COVID-19 impact the L&D teams?

4. What challenges did L&D teams face during the crisis? What were the outcomes?

5. As restrictions ease, and economies open, what does the future look like?

" [During the crisis we faced a] sheer quantity of changes to processes & procedures to accommodate safety measures, as well as the 'buckle down, guess I need to learn this' behavior from even those employees who typically avoided changes and new technology.**"**

— survey respondent, open comments

3 takeaways from the *L&D during the global crisis survey*

1. Learning teams played a pivotal role in preparing their workforce for the new reality of remote work. This has led to a newfound understanding and importance of what the Learning function can do for an organization.

3. The long-promised shift to virtual learning may finally be here for many training programs. This includes previously sacrosanct programs, such as Leadership Development. This shift will lead to increased demand in learning technology.

2. Overall, organizations feel confident about how they handled the crisis. Going forward, L&D leaders will keep exploring ways to continue virtual development and delivery of training.
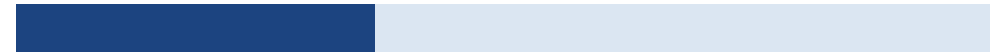
The crisis didn't stop learning

As governments shut down and organizations sent their workforces home, the question became: what would happen to Learning Programs? Would all training be cancelled or postponed? Could current initiatives be done virtually?

They could and they did. Learning soldiered on — even in the face of a crisis. Training program completion rates didn't drop significantly. On the contrary, a majority of organizations say their completion rates either mostly stayed the same or increased during the crisis.

Hard Skills vs Soft Skills

What changed was the learning subjects on offer. As the crisis required entirely new ways of working, program offerings and delivery methods both needed to pivot. Learning teams recognized that leaders, managers, and employees needed development on how to work remotely. Thus, training in sales, customer education, and employee onboarding were less important than initiatives in soft skills, leadership development, and technical skills.
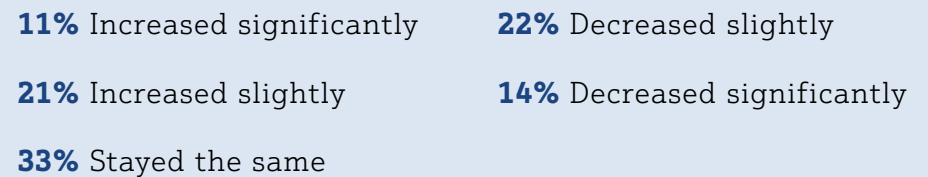
37% of organizations, the crisis didn't affect their content creation strategy.

49% of all organizations are developing more learning programs in-house.

Figure 1: How did the crisis affect completion rates?

11% Increased significantly   **22%** Decreased slightly

21% Increased slightly   **14%** Decreased significantly

33% Stayed the same

Figure 2: Since the start of the crisis, organizations are emphasizing the following training types.

42% Soft skills   **31%** Compliance

40% leadership development   **29%** Reskilling/upskilling

35% Technical skills

The crisis didn't stop learning

The COVID-19 crisis has affected every industry, causing record unemployment numbers across the United States. As company after company shut their doors, reduced staff, and looked for ways to transition their work, the question became: how would companies survive?

The Learning function is a resilient one and has proven its importance during this unprecedented crisis. So, most respondents believe they've handled the crisis well. Many were able to pivot their previous face-to-face training offerings to a digital environment. Less than 1 in 6 cancelled all kinds of training. While there have been fits and starts, most learning leaders give their teams good marks.

There are several possible reasons for this. Many organizations already had virtual training in some form or another. Plenty of organizations had an LMS. The crisis forced companies to lean heavily on the systems they already had, scaling smaller programs to the larger enterprise. As a result, companies weren't caught as unaware as they could have been. Usage of digital learning platforms went up significantly in this time — 42% of companies were already using online learning, while an additional 12% started to.

Going forward, organizations will seek new processes and programs as they settle into the new way of learning.

## Learning outcomes, defined.

Unaffected: Programs were already mostly virtual/remote, so the crisis didn't affect learning too much.

Seamless: Experienced little/no trouble during the crisis. Successfully pivoted current programs to virtual.

Intermittent: Cancelled some programs but continued to deliver Learning.

Disrupted: Cancelled/postponed most or all Learning programs.

Figure 3: How would you define your organization's experience with Learning during the crisis?

5%	Unaffected
27%	Seamless
50%	Intermittent
18%	Disrupted
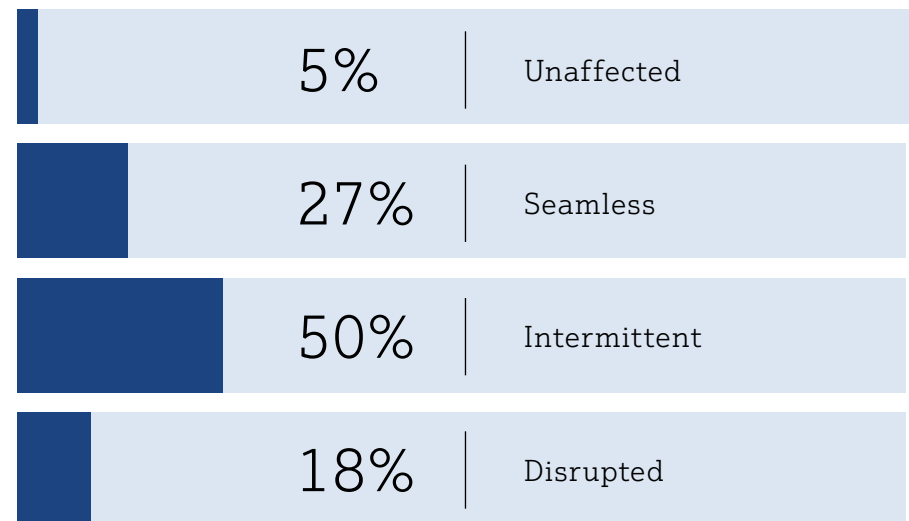
L&D's seat at the digital table

The transition to digital has been long promised, although companies have resisted. However, the COVID-19 crisis accelerated everyone's timelines. Organizations that might have been resisting a pivot to virtual/digital training for years (possibly decades) were suddenly forced to adapt almost overnight.

When they did, many discovered the results were surprisingly good — 82% said they were able to continue Learning programs with few interruptions. Many companies had already started the transition to a more digital-first learning strategy, so they weren't entirely caught unaware. As one respondent said, "We were surprised by the acceptance by many people that technology has to be used for various activities. Digital adoption has been high."

When the crisis happened and organizations turned to remote work, they leaned on their L&D teams to prepare employees for the switch. This meant that very few jobs within the Learning teams were affected during the crisis. More than three-quarters of respondents report that their learning teams remained intact during the crisis, with no furloughs or layoffs – a vast contrast to numbers reported across other functions.

L&D also played a pivotal cross functional role in transitioning employees to remote work and adjusting their learning content to be digested digitally. Much was to be done, from switching modalities to virtual solutions or training employees on basic and advanced technologies. Learning teams rose to the challenge and delivered when it most mattered.

75% of respondents say that NO members of the learning team were furloughed or laid off during the crisis.

65% of organizations, the learning function was involved in preparing employees for the shift to remote work.

Figure 4: In response to the crisis, the learning team increased cross-functional collaboration with the following departments:

HR	IT	Operations
54%	54%	40%
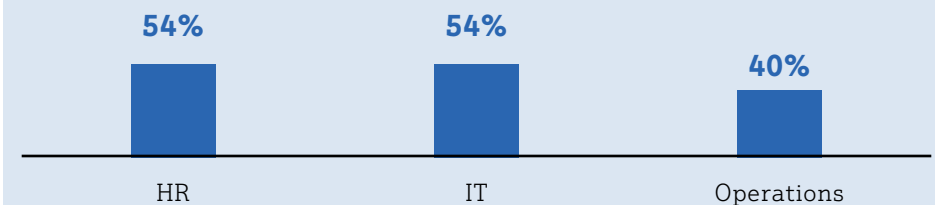
Figure 5: Strategies learning teams have applied to ensure learning programs are more effective during the crisis

72% Increased use of learning platforms

67% Increased frequency of communications

57% Gave guidance to instructors on virtual learning best practices

53% Decreased the length of learning sessions

Many learning leaders were unenthusiastic about their learning delivery infrastructure before February 2020. This didn't change with the crisis.[1]

" We had a thoughtful, well-planned multi-year effort just underway to [transition] selected instructor-led training to remote delivery. These selected ILT were not mission critical. Now, we are converting mission critical ILT to remote delivery on an accelerated timeline. The majority of instructional designers do not have experience in designing for synchronous remote delivery and instructors for these courses have no experience.**"**

— survey respondent, open comments

[1] 2020 CLO State of the industry survey.

Ground-level view of the shift to virtual learning

Classroom learning is easy to visualize. Place a group of students together in a room, give them an instructor to teach the materials, and let the development happen. But remote learning is more nebulous. How exactly are employees taking the training? Are they using a desktop computer or a mobile device? Are they accessing training through podcasts or video?
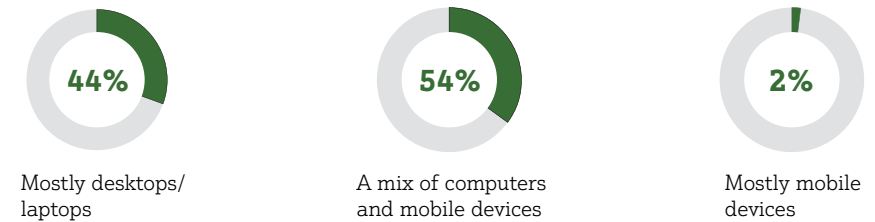
Knowing the answers to these questions both gives us a snapshot of what the current landscape looks like and demonstrates how employees learn.

The survey suggests that employees haven't given up their trusty computers for an entirely mobile experience quite yet. Just 2% of respondents say their workforce is mostly using mobile devices. Most prefer to use desktops or laptops — at least some of the time. Virtual instructor-led training (vILT) is one of the most popular delivery formats that has replaced in-person training, followed by video and self-paced eLearning.
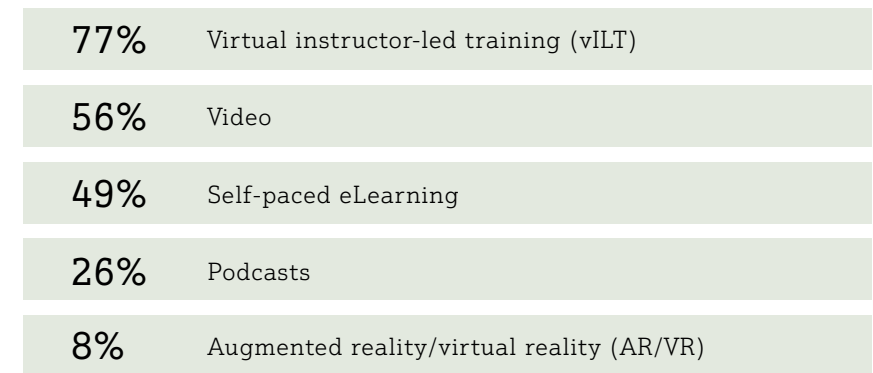
A few organizations are taking advantage of the crisis to explore vanguard learning delivery methods. For example, one in four are using more podcasts, while 7% are exploring augmented or virtual reality.

In many instances, learning teams took technology already in place and scaled it. For example, 92% of organizations use vILT for learning. 90% use video, while 58% use podcasts. By leveraging existing technology, organizations were able to smooth any roadblocks they incurred during the crisis. As restrictions lift, many will continue this transition to virtual, with some even leading with it.

Figure 6: What devices are the majority of your learners accessing their virtual learning on?

44%
Mostly desktops/laptops

54%
A mix of computers and mobile devices

2%
Mostly mobile devices

Figure 7: What delivery formats are businesses using more of?

77%	Virtual instructor-led training (vILT)
56%	Video
49%	Self-paced eLearning
26%	Podcasts
8%	Augmented reality/virtual reality (AR/VR)

Figure 8: Learning that has moved to digital during the crisis

71%	Soft skills
62%	Leadership development
61%	Employee onboarding
60%	Technical skills
60%	Compliance training
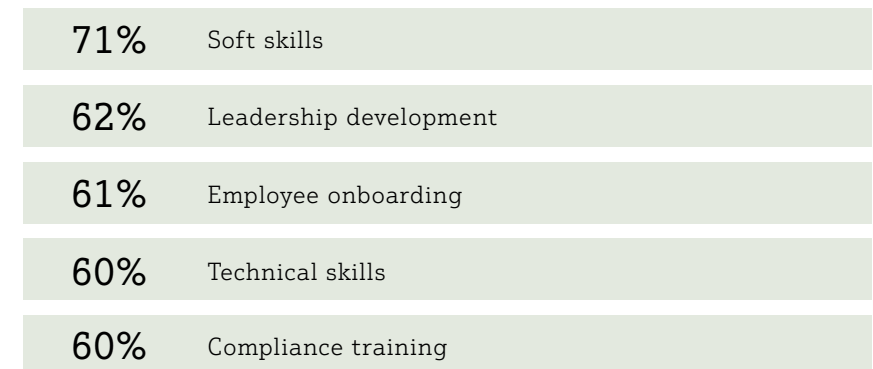
Rethinking Leadership competencies

As part of the content creation strategy pivot, learning teams are reexamining the Leadership competencies they ask of executives. The crisis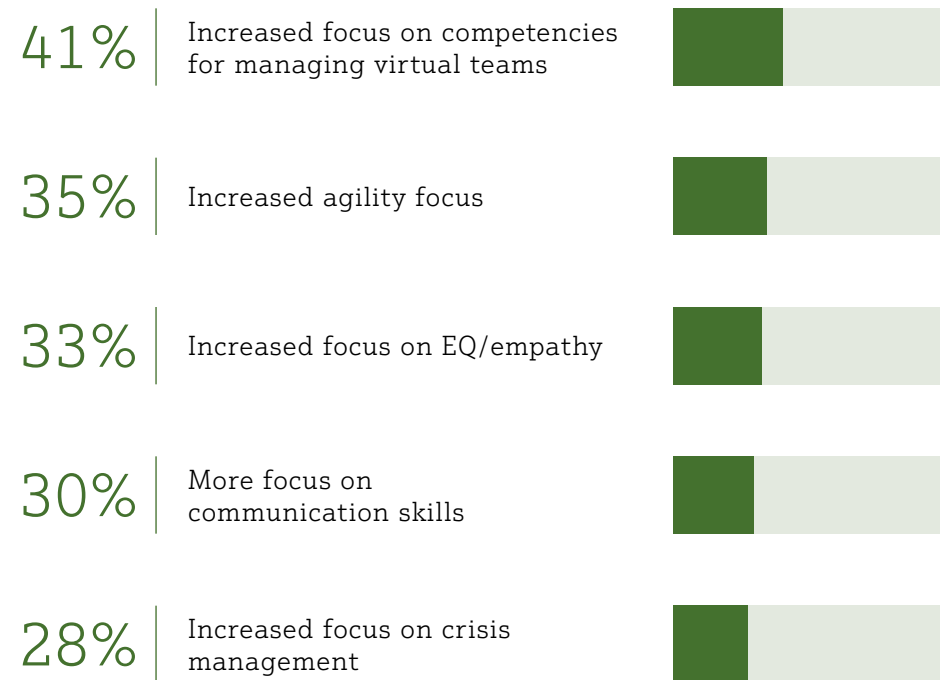 brought on wholesale disruption to many industries and learning leaders are retooling their leadership competencies to better prepare executives to the new ways of working.

One of the most pressing competencies is the need to manage teams who are mostly or entirely virtual. As one respondent said, "Working from home effectively is a skill, with a distinct set of habits that must be developed." To this end, competencies changed to address the needs of remote leaders and employees.

Figure 9: How did organizations rethink their Leadership competencies?

41% Increased focus on competencies for managing virtual teams

35% Increased agility focus

33% Increased focus on EQ/empathy

30% More focus on communication skills

28% Increased focus on crisis management

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❚❚[During the crisis], quality of interactions, relationship building, and sales went up. It provided an opportunity to apply 100% virtual technology applications and processes when we may never have done so, with some measured success. It may have a long-lasting effect on how we continue to do business internally and externally with others.**"**

— survey respondent, open comments

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Making the technology work

When the crisis hit, organizations had to pivot quickly. This meant using available technology, while planning for short- and long-term equipment and infrastructure upgrades.

One thing the crisis proved is how much organizations were already prepared for the realities of an entirely remote workforce by virtue of the technology they already use. More than half of all companies already had an LMS. Two thirds already used meeting solutions. And slightly less than half were using content creation software.

Going forward, technology stack use for virtual learning will become a center piece of L&D strategy, as organizations have to get comfortable with the use of technology for distance learning.

How organizations are overcoming technology infrastructure challenges

65% of respondents agree: their learning delivery infrastructure was prepared to respond to the crisis.
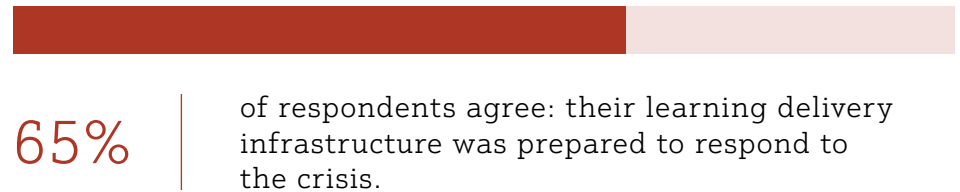
Figure 10: Organizations that have just started using the following technology stacks

29% Meeting solutions

25% Collaboration software

8% Learning Management Systems (LMS)
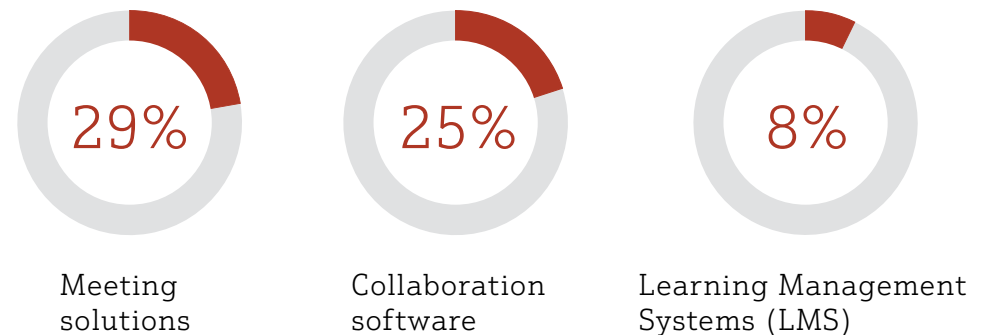
Budgeting challenges during the crisis

Cost is always a factor for learning programs and initiatives. With the crisis reducing revenue for many, it follows that budgets would also be reduced. For example, one survey respondent said their team lost about 95% of their budget.

However, this wholesale slashing of L&D budgets seems anecdotal and isn't borne out by the data. While L&D leaders seem pessimistic about the state of their learning budgets, less than half reported their budgets decreasing during the crisis. For most, there was no change.

Currently, budgets for learning investments are still bullish. According to post-crisis data from Chief Learning Officer, 18% of learning leaders consider investing in learning technology as essential over the next 12-18 months. Further, 36% call such investments a high priority.[2] With the crisis proving the value of existing systems such as the LMS, learning leaders will continue to prioritize learning technology investments over the coming year.
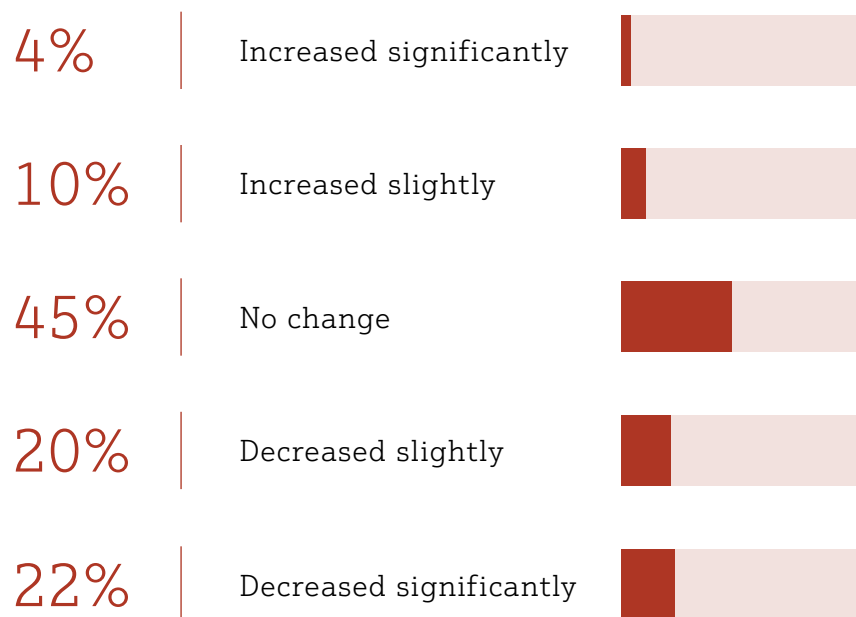
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[2] 2020 CLO State of the industry survey.

[3] 2020 CLO State of the industry survey.

Many learning leaders expect their L&D budgets to decrease this year. Despite this, learning leaders are still optimistic about the outlook of L&D in the coming year. [1]

Figure 11: How has your learning budget changed during the crisis?

4% | Increased significantly

10% | Increased slightly

45% | No change

20% | Decreased slightly

22% | Decreased significantly

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For all its challenges, the COVID-19 pandemic may have sparked the shift to digital learning that's been threatened for decades.

" [The] L&D role has intensified and provides a pathway for change management."

— survey respondent, open comments

Budgeting challenges during the crisis

In a post-COVID world, can classroom training bounce back? Should It?

There's scant evidence to suggest organizations will return to in-person training anytime soon — and does it really need to? Nearly three-quarters of respondents believe their organizations will continue the remote learning journey. While the crisis may have accelerated some timelines, organizations seem more intent on forging a new normal rather than returning to business as usual.

91% of respondents say their organization's future learning strategy will be permanently altered due to the crisis.

65% of organizations plan to continue the shift to virtual learning *even after the current crisis has passed.*

The future of leadership training

The new normal includes restructuring high-touch programs like leadership development. Once considered untouchable, Leadership Development programs are undergoing the same virtual shift as other learning programs. A third of respondents plan to retool their current high-touch, in-person leadership development programs to virtual methods, including a mentorship component.

Speaking of business as usual, many believe that's a long way off. Nearly three-quarters of respondents say it will take longer than 6 months. Further, one in five believe a return to the past isn't happening. Given those views, L&D leaders should accept and embrace the future.

Over the next 6 months, **32% of organizations** will retool their high-touch learning programs to include a blend of virtual solutions and increased mentorship.

Figure 12: How soon do L&D leaders expect a return to "business as usual"?

8%	1-3 months
20%	3-6 months
31%	6-12 months
20%	1-2 years
20%	Never

" [The crisis has] forced us to implement long range plans (5 years out) to offer more remote learning, and we transitioned to doing it within the first two weeks. We've continued to build on that.**"**

— survey respondent, open comments

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L&D during the global crisis: the numbers

46% of organizations, ALL employees moved to remote work.

35% of organizations transitioned MOST in-person training to virtual, while postponing or cancelling other events.

37% of organizations, **75-100% of classroom training programs** have been or will be converted to virtual training by the end of 2020.

65% At 65% of organizations, the learning function was integral in preparing employees for a shift to virtual work.

Employee levels experiencing the greatest level of disruption thanks to the crisis were line-level employees (29%), managers (19%), and C-suite members (19%).

Figure 13: The greatest challenges for learners during the crisis were:

64%	Technical (connectivity, access)
58%	Family (eldercare, childcare)
44%	Lack of time
37%	Mental health (stress)
25%	Lack of resources

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Final thoughts

During the COVID-19 pandemic, Learning teams were under immense pressure to reinvent their offerings and their businesses against a backdrop of a worldwide global crisis. What's amazing is that for most of our survey respondents, they've managed the impossible, or at least the very improbable. L&D Leaders who didn't grasp the potential of virtual or distance learning are now open to its possibilities.

While there have been challenges, such as declining budgets for some, the research is clear: learning hasn't collapsed, or taken a backseat to other operations. Most organizations have successfully pivoted to a digital-first environment with little difficulty.

Organizations may have resisted digital transformation in the past, but the crisis forced it upon many – and Learning is a key pillar of that journey. Now that companies have had the chance to evaluate virtual development, many will continue to deliver training remotely going forward. If learning wasn't viewed as a critical function in the past, it certainly is today.

Methodology

The 2*020 L&D in a global crisis* survey was conducted online by the research arm of *Chief Learning Officer*. Invitation letters were sent to members of the *Chief Learning Officer* magazine research board. An invitation to complete the survey was also sent to CLO readers via email digest newsletters. Responses were collected from June 16 to 29, 2020. All questions were voluntary and opt-in. Not every respondent answered every question; the survey completion rate was 74%. Survey respondents could belong to the same organization. All answers are the personal opinions of the respondents and not the legal position of any organization or business. No incentives were offered, besides a copy of this white paper for interested participants. Results are aggregated to ensure confidentiality.

For survey purposes, *COVID-19 or the crisis* refers to the period from February-May 2020 when the COVID-19 pandemic spread across the globe, prompting lockdowns, quarantines, and stay-at-home orders worldwide.

Demographics

Survey name

L&D during the global crisis

Survey dates

June-2020

Respondents

781

Organization size

<1,000 employees: 49%

1,000-2,499 employees: 12%

2,500-4,999 employees: 11%

5,000-9,999 employees: 8%

>10,000 employees: 20%

Geographic distribution

One country, one location: 26%

One country, multiple locations: 39%

One country, some global distribution: 14%

Highly distributed: 21%

Top represented industries

Consulting: 13%

Education: 15%

Financial services: 9%

Healthcare: 10%

Manufacturing: 5%

Nonprofit/government: 13%

Technology: 8%

All other industries less than 5% of respondents.

Numbers may not total 100% due to rounding.

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