



# Learning in the mobile enterprise

Practical perspectives to help improve workforce efficiency and increase business agility

This report has been written by Towards Maturity, building on its extensive benchmark research since 2003 with over 2,900 organisations.

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January 2014



## Foreword by Andre Wigley, CEO of Redware

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The mobile enterprise is not going away, in fact, it is strengthening our organisations and driving change, delivering value in not only cost, but also productivity. We have seen great examples of this in organisations of all sizes and in every department, but how do we make the most of it in learning and development?

As we learn from the organisations that have implemented mobile learning within the enterprise, we have a growing evidence base that we can draw from. We now know that there is a clear desire for mobile learning in the workplace both from the organisation's perspective and the employee's. We know that mobile directly impacts productivity, employee satisfaction and knowledge sharing. We also know that the majority of managers and employees feel flexible, remote and mobile working all contribute to a more agile, responsive workforce.

We know all this, yet many organisations are still not embracing the mobile enterprise due to concerns around the complexities of mobile, from technological and security fears to the loss of data and operating a mobile platform across devices and operating systems. They are serious concerns, but due to the level of innovation in mobile, they are risks that can be easily mitigated and contained.

As the mobile enterprise takes hold and the technology is adopted to negate these concerns, learning and development will play a crucial part in the use of mobile in the workplace. It provides us with an unprecedented opportunity to engage employees at every level and provide content and resources that cater to their needs and help them to do their job to their fullest. We will be central to the innovation, as we discover new and exciting ways to deliver learning to employees through new media and techniques only possible through smart devices.

This report provides some fascinating insights to help organisations develop mobile in the enterprise and harness it within learning and development. It is clear that there is a huge desire for mobile and with research like this from Towards Maturity, we can encourage buy-in to mobile, because it's here to stay.

The Towards Maturity benchmarking study is both invaluable and crucial to our industry. We are at the forefront of a market which is changing business globally and being a part of this research is fundamental to the success of our solutions.

The resulting findings have the potential to shape and influence everything that we set out to achieve as a business. We are extremely pleased and proud to be a part of this revolutionary work which Towards Maturity are championing to gather knowledge surrounding best practice and innovation in learning.

*Andre Wigley  
CEO  
Redware*



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## 1 The mobile workforce

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In the Towards Maturity 2013-14 Benchmark report: The New Learning Agenda: Talent: Technology: Change<sup>1</sup>, analysis of data from over 500 organisations revealed new insights into how top learning companies are implementing learning technologies to support learning and development. This In Focus report draws on this data, together with data from over 2,000 learners gathered in the Towards Maturity Learning Landscape<sup>2</sup> study during 2013, to:

- Help **organisations** develop a more mature strategy to support learning in the mobile enterprise
- Help **business leaders** better understand the role of learning and development in supporting an increasingly mobile and flexible workforce
- Help **L&D teams** as they embrace new ways of learning to support new ways of working

This report explores three main themes:

- How do **people** become more productive when they are working in a dispersed workplace?
- What do **organisations** need to do in order to advance/enable/engage the new, mobile, workforce?
- How must **Learning and Development** respond?

### 1.1 Characteristics of the 'mobile enterprise'

No longer just a buzz word - mobility has become an integral part of the modern business environment and is fast becoming the norm. Technology is rapidly driving change in the way in which organisations operate. It enables more flexible working patterns, distributed yet highly connected workforces, remote working – and increasingly, brings learning and development tailored to the individual to them at the point of need.

Enterprise mobility involves the capture and delivery of business information at the point of activity. That point might well be the traditional workplace or customer interface, but the increasingly mobile workforce now moves that 'point of activity' with them wherever they go. Employees are bringing high performance multimedia devices into the enterprise wanting access to the network on the move. Clients too are increasingly driving the feature requirements of the enterprise network and want reliable and instant connectivity to information and support.

Instant access to data, superfast 4G networks, data backed-up to the cloud and intuitive applications, mean staff spend less time searching and more time 'doing'.

Whilst many organisations now accept that staff will be using their own smartphones and tablets, concerns over security, the wide variation in personal devices and fears that they will lose control mean that such usage is tolerated rather than embraced wholeheartedly for the opportunities it offers. Indeed, our own research shows fewer than 3 out of 10 organisations have clear policies around Bring Your Own Device.

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<sup>1</sup> [www.towardsmaturity.org/2013benchmark](http://www.towardsmaturity.org/2013benchmark)

<sup>2</sup> [www.towardsmaturity.org/learner](http://www.towardsmaturity.org/learner)

## 1.2 Workforce mobility brings significant benefits

Over the last 10 years, technology has radically changed and has impacted the way that we work and communicate, with more change still to come. Gartner Inc<sup>3</sup> define a strategic technology as one with the potential for significant impact on the enterprise in the next three years. Firmly in the top ten for 2014 are mobile (both mobile diversity and apps) and the impact of the cloud for individuals and business.

Flexible working is described by the ILM<sup>4</sup> as ‘a set of practices which give employees flexibility on how long, where and when they work’. It is now standard practice in 50% of companies, bringing significant benefit to the business, as well as to employees themselves. Stanford University report a 13% performance improvement in those working from home<sup>5</sup>: 82% of managers in the ILM study think that flexible working is beneficial to their business, reporting improvements in productivity, commitment and retention of staff, while 62% think it helps organisations better respond to customer need. Frost & Sullivan report that 24% of employers see improvement in productivity as the primary benefit of deploying mobile solutions<sup>6</sup>.

In their 2012 UK report, ‘Flexible working provision and uptake’<sup>7</sup>, the CIPD estimate that 61% of large and 36% of small employers allow home-working on a regular basis. 20% of employees now work from home *regularly*, with 14% mobile working – for example using their laptop to work from another location. Apart from improving motivation, retention and engagement, 47% believe that it makes them more productive and 30% report a positive impact on knowledge sharing. Just 12% report technological constraints causing a barrier to flexible working. Of those that offer flexible working, 76% are seeing improved retention, 73% are seeing improved motivation, 72% improved employee engagement, 58% improved productivity and many also report reduced absenteeism, better talent management, business continuity, team working, knowledge sharing and innovation). Just 4% overall report a negative impact.

Forrester, in their February 2013 report on Mobile Workforce Adoption Trends<sup>8</sup> across 17 countries, characterise 29% of the global workforce as anytime, anywhere information workers – those using 3 or more mobile devices, working from multiple locations and using many apps.

Many organisations have a policy that allows flexible working, but do not necessarily want it to become the norm. The CIPD estimate that only half in the UK have a formal policy in place for mobile working and working from home. As a result, investment in the technologies to support it can be restricted.

## 1.3 People on the move

Today’s learner increasingly has multiple devices. Sophos Labs<sup>9</sup> estimate that we each carry an average of 2.9 devices. These devices allow users to manage their communications without placing the burden on the

<sup>3</sup> <http://www.itbusinessedge.com/slideshows/top-10-strategic-technology-trends-for-2014.html>

<sup>4</sup> Flexible working: goodbye nine to five. Institute of leadership and Management, March 2013 [https://www.ilm.com/~media/ILM%20Website/Downloads/Insight/Reports\\_from\\_ILM\\_website/Research\\_flexibleworking\\_march2013%20pdf.ashx](https://www.ilm.com/~media/ILM%20Website/Downloads/Insight/Reports_from_ILM_website/Research_flexibleworking_march2013%20pdf.ashx)

<sup>5</sup> Does working from home work? Evidence from a Chinese experiment, Nicholas Bloom, James Liang, John Roberts and Zhichun Jenny Ying, Stanford University, 18<sup>th</sup> December, 2012

<sup>6</sup> Frost & Sullivan 2013. Managing Communications for the World of BYOD

<sup>7</sup> <http://www.cipd.co.uk/hr-resources/survey-reports/flexible-working-provision-uptake.aspx>

<sup>8</sup> [http://www.vmware.com/files/pdf/Forrester\\_2013\\_Mobile\\_Workforce\\_Adoption\\_Trends\\_Feb2013.pdf](http://www.vmware.com/files/pdf/Forrester_2013_Mobile_Workforce_Adoption_Trends_Feb2013.pdf)

<sup>9</sup> <http://www.scmagazine.com/2013-mobile-device-survey/slideshow/1222/#0>

organisation IT resources for every task. When linked to the business communications system, the user can separate their work and personal identity, allowing the organisation to maintain security policies even when the user is working on their own personal mobile device. However, extending a single business number to the employee allows the employer to keep the number in the event of the employee leaving, thus helping to ensure business continuity.

Moving forward, organisations have to tailor learning to modern-day work practices and that means supporting learning anytime and anywhere.

But to what extent are L&D departments responding to the new mobile enterprise? Are they better able to deliver learning and performance support to individuals or are they hampered by constraints?

#### 1.4 How are top learning companies addressing the mobile enterprise?



In past studies we analysed the implementation activity of ‘e-mature’ learning organisations and grouped their behaviours into six workstreams that we describe in the **Towards Maturity Model**<sup>1</sup>. We define *top learning companies* as those that are in the top quartile for the Towards Maturity Index (see References for further detail).

Analysis of the activities leading to success in top learning companies can provide a blueprint for accelerating progress for all and overcoming the barriers to enterprise mobility. Top learning companies also set the benchmark to aspire to in terms of benefits that can be achieved from technology-enabled learning:

- 26% improvement in staff satisfaction
- 18% reduction in staff turnover
- 16% increase in productivity

#### 1.5 New ways of working demand new ways of learning



The Towards Maturity 2013 Benchmark report, ‘New Learning Agenda: Talent: Technology: Change’ sets out nine challenges for L&D. New Learning Agenda item 6:

#### **Embrace new ways of learning to support new ways of working**

More flexible working patterns have been made possible by cloud and mobile technologies, but organisational learning has yet to follow suit. Fewer than 20% of organisations that have introduced mobile learning are reporting the benefits they expected, despite 71% of organisations now using mobile technology and 30% offering learning through the cloud.

***71% of organisations are using mobile devices  
(up from 36% in 2010 and 47% in 2012)***

Proactively supporting on-the-job development and joining up staff into learning networks helps establish a learning culture that crosses the physical workplace boundary.

**Case study: Enterprise-wide global mobile learning**

In the automotive industry, organisations typically take a complex form. The sales and maintenance of vehicles will often work on a franchise model that spans the globe, with the enterprise and manufacturing aspects of the business equally fragmented, distributed across regions, countries and continents. A critical challenge that the industry has been presented with is the sharing of information through such a complex network, made even more difficult with the regional differences when operating in so many different countries. This can make it difficult to maintain service consistency and quality, knowledge sharing and collaboration across the enterprise.

In order to overcome these challenges and difficulties and for an automotive organisation to thrive, they had to be at the forefront of enterprise mobility. They have been early adopters of many collaboration tools and technologies as they have emerged, such as virtual conferencing to reduce travel and time spent. Mobile learning is no exception, with automotive organisations embracing it as part of their engagement strategy. For it to succeed, the organisation had to foster a pro mobile culture:

- BYOD (Bring Your Own Device) has played a major part in the success of mobile learning. Use of Mobile Application Management in one organisation reduced security risks and allowed for personal targeting of resources
- The organisation already had a strong remote working culture, employing cloud based applications so users could access data anytime, anywhere
- The organisation's learning mix before the implementation of mobile learning already included the use of online communities and online classrooms
- Following an organisational survey, it was clear that there was a desire from users to access resources on mobile devices

The implementation of mobile learning in the organisation was considered a success following initial reports on uptake and usage. An extensive survey was also carried out that was very positive in terms of content, usability and experience. This was largely down to their preparedness for mobile learning and fostering a culture that allowed for mobile learning to thrive, through strong BYOD policies and tightly integrated communications to encourage uptake.

It had helped that as an already progressive organisation, employees were used to them using new and emerging technologies as part of the mix. Extensive consultation, review and feedback processes with employees made sure the learner was central of the development of their mobile learning initiative.

## 2 Technology is driving change in learning

Mobile devices, cloud computing, social media and virtual meeting technology are transforming the business environment thanks to the increased penetration and reliability of high speed broadband connections and mobile networks. Mobilising key business applications such as SharePoint or SAP – or the Learning Management System – allows employees to access critical information and support when and where they need it, with the resulting increase in personal productivity and decrease in frustration! The workplace is being transformed but to what extent is learning being transformed too?

New consumer products for streaming high definition multimedia (for example Blu-ray players, networked digital TV or streaming media players), smartphones and rich media devices (such as the iPad3 and Kindle Fire) have transformed the personal experience of technology. Learning and development teams in many organisations are transforming learning too, driven by the consumer need for speed and flexibility. However, others are struggling with incompatible or older hardware, rigidly protected systems or unreliable wireless networks.

### 2.1 Mobile devices

Desktop virtualisation delivered through Virtual Private Networks enables employees to securely link to their corporate network. This widens access to company information and email systems to remote staff with a laptop and a broadband line, and increasingly those with access to mobile networks and mobile devices such as smartphones and tablets. The virtual desktop user now has the same experience as their colleagues working in the office.

Towards Maturity have tracked the adoption of mobile technologies for learning over the last ten years and looked at both actual and planned usage<sup>10</sup>. In 2013, 71% of the Towards Maturity sample across 481 organisations and 44 countries are currently using mobile technologies. 9% of these organisations would consider that they are just experimenting with their use.

Across the sample as a whole:

- 52% provide devices (e.g. smartphones)
- 48% provide tablet devices
- 41% support Bring Your Own Device (BYOD)

78% are planning to offer some form of mobile learning within the next two years.

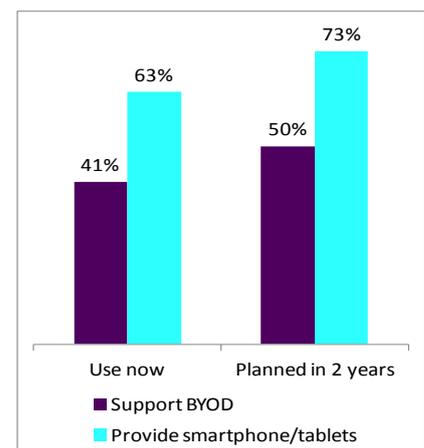


Figure 1 The rise of BYOD in learning

<sup>10</sup> For a full analysis of mobile device usage, see the Towards Maturity In Focus report: Mobile Learning at Work 2014

With sales of tablets set to overtake those of laptops by 2015<sup>11</sup> there are two key issues for L&D developing device-independent mobile learning content:

- a) Designing content for the small screen (whether that be one of the latest trending 6” smartphones or 7” mini tablet makes little practical difference to implementation) and
- b) Ensuring that it can be reliably accessed and secured on all three main mobile platforms (Android, iOS and, less importantly, Windows)

## 2.2 Live online learning

Virtual meetings using commercial systems or Voice Over IP systems are offering organisations large savings in terms of staff time and travel, as well as reducing the carbon footprint. Across the 2013 Benchmark as a whole, 78% are now using virtual meetings, with a further 10% planning to use them in the next two years. Video conferencing too, although potentially merging into one and the same as the virtual meeting (particularly in smaller businesses without formal video-conferencing technology) will be in 86% of workplaces, with 64% using VOIP conferencing tools such as Google+ Hangouts and Skype.

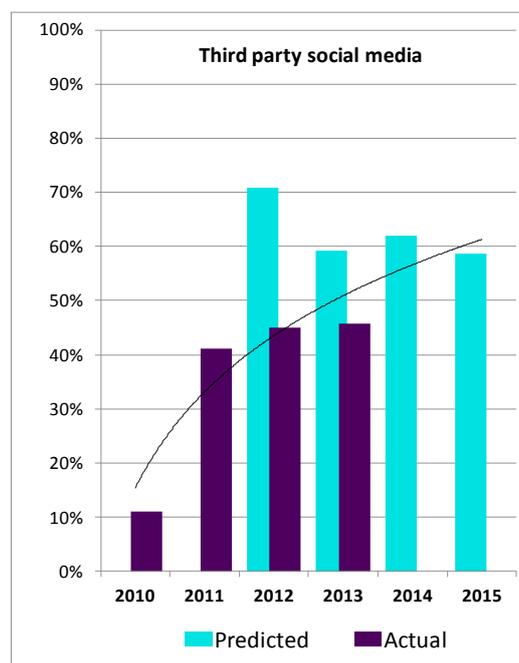
Use of virtual meeting environments in multinational organisations is widespread, with 86% using them for learning now, rising to 93% in the next two years. Business communications are no longer dependent on costly internal networks.

## 2.3 Social media

Unified communications, with the same mobile device used to integrate many modes of business communications, is transforming business processes and allowing teams to work collaboratively on the same project, sharing ideas and resources, developing content and learning from each other as they do so.

Collaborative learning technologies are rapidly increasing in adoption with a four-fold increase in usage of third-party tools over the last four years as shown in Figure 2. In-house social networking sites have increased more slowly to 38% of organisations in the 2013 Towards Maturity Benchmark.

**Figure 2 Increase in use of third-party social media**



## 2.4 Software as a Service

On average, 28% of organisations use Software as a Service to support learning. 52% of the IT and telecoms sector are active, but some industries (e.g. construction, process industries and land-based industries) are not reporting activity at all. 37% of organisations plan to be using SaaS within the next two years.

<sup>11</sup> IDC Worldwide Quarterly Tablet Tracker, December 2013

## 2.5 Working in the cloud

On average, 30% of organisations now use cloud-based learning content varying from 100% across Higher Education to just 18% of financial organisations.

**Table 1 Sectors using cloud-based learning solutions**

Sector	% of sample using Cloud Computing now	% planning to be using Cloud computing in 2 years
<b>All</b>	<b>30%</b>	<b>42%</b>
Higher education	100%	100%
Further education	20%	80%
Wholesale and retail trade	14%	71%
Central and local government	28%	61%
Automotive manufacture	39%	48%
IT and telecoms	38%	46%
Charities	29%	37%
Professional / technical services	33%	33%
Health and social care	24%	28%
Finance and insurance	18%	27%

Cloud-based system usage tends to be higher in organisations with a more mobile workforce and in those that are delivering less compliance-related content. It is also higher where the population is more likely to be geographically widely dispersed, such as Australia where the percentage rises to 50%. Those in senior learning leadership roles are more likely to report that they are already using cloud-based content (65% of senior managers vs. 33% of content developers or classroom trainers).

However, the proportion does not increase significantly in multinational organisations over those with single locations. Business agility is an important factor, as is the likelihood of having made significant investment of budget in server-based systems. Small companies are also most likely to offer cloud-based solutions (82% of micro-businesses with fewer than ten staff vs. 29% of those with 20,000+ staff).

23% are now operating their LMS as a cloud-based service.

In general, top learning companies are making the most of the wide range of technologies at hand to create more choice for their learner.

### Five benefits of a cloud-based learning solution

1. Easy to buy and deploy – with no up-front capital investment on hardware
2. The hosting provider maintains the system so that it is always available, secure and fully backed up
3. Highly scalable and straightforward to add more users
4. Users always have the latest version of any software or information
5. Content is location and device independent

## 3 The mobile learner as customer

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Understanding the preferences of the learner and the ways in which they are learning in their own time can help L&D to focus on the learner as customer. Customer-activated learning means empowering the mobile workforce wherever they are working and regardless of the device they are using.

### 3.1 Understanding learner behaviour

Are staff in today's more mobile enterprises expecting the same technology that supports their work environment to also support the way that they learn what they need for their job? It appears that they are. 62% of over 2,000 learners in our ongoing Learning Landscape<sup>12</sup> survey are using a mobile device to access resources to help them do their job. 43% report that the ability to specifically access learning from their mobile device is essential or very useful, with a further 13% reporting that this would be useful if available. However 22% do not (yet) own a smartphone or tablet device.

#### 3.1.1 What devices are learners using?

In the Towards Maturity 2013 Learning Landscape report, of the 78% who own a smartphone or tablet, one third are currently using their own devices to access resources they need to do their job better. What's more we see that learners are more likely to use their own tablet or mobile phone to access work related resources and learning than one provided by their work place:

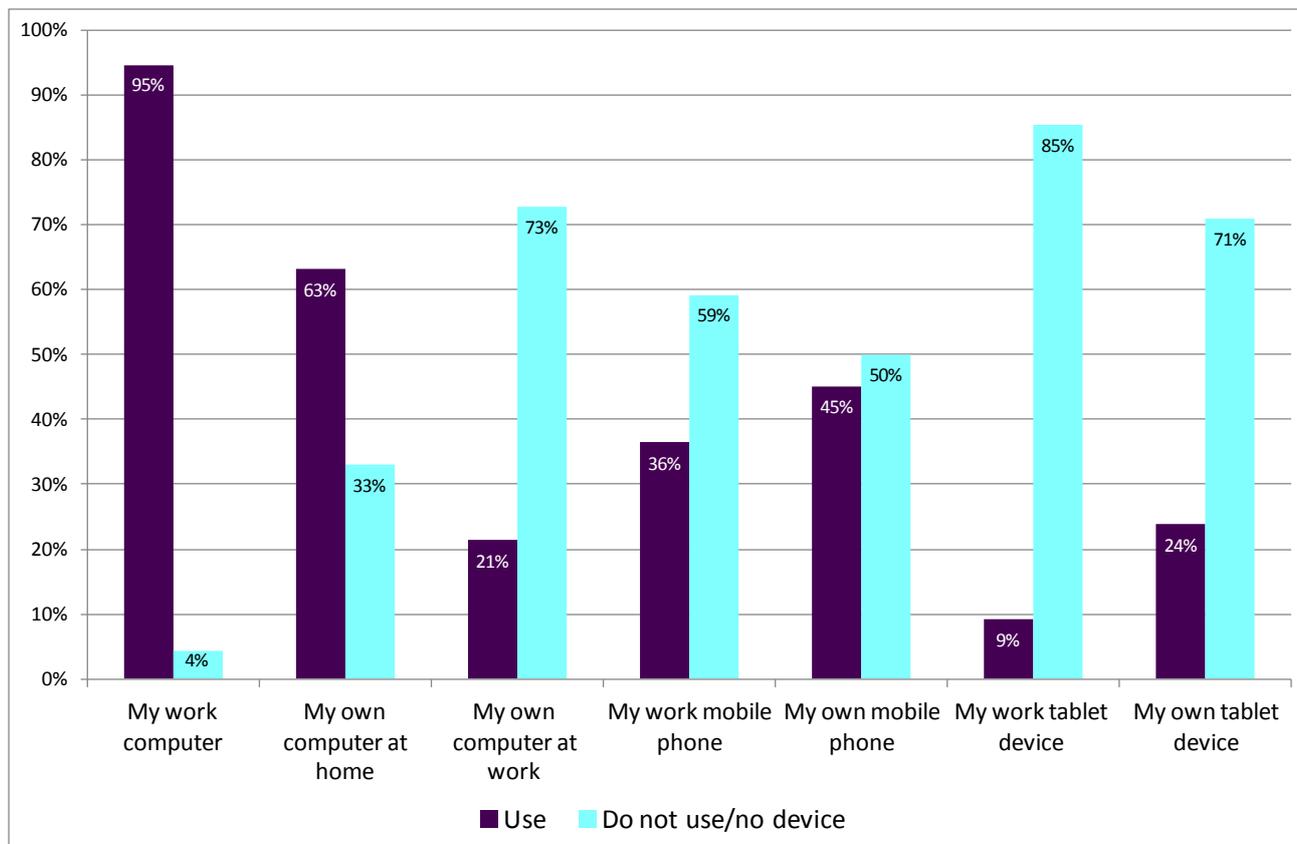
- 32% are using a work mobile phone to access work-related resources and information (20% accessing such resources often)
- 7% are using a work tablet (with 4% accessing often)
- 41% are using their own smartphone (with 15% accessing often)
- 24% are using their own tablet (with 10% accessing often)

Those in management roles are most likely to be using tablet devices – for example, 25% of senior managers use their own tablet compared to just 8% of those in sales roles.

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<sup>12</sup> [www.towardsmaturity.org/learner](http://www.towardsmaturity.org/learner)

Figure 3 Devices used to access work-related resources and information



Source: Towards Maturity Learning Landscape with over 2000 learners

Managers are also more likely to be using their own smartphone, with 48% currently using their own device to access the resources and information they need to do their job better, compared to just 18% of those in customer service roles or 26% of those in sales roles.

Device ownership is also age-related. Half of those over 60 use their own smartphone or tablet to access resources, compared to 3 out of 4 of those aged 41 to 50 and 5 out of 6 of those under 40.

### 3.1.2 When are staff using their mobile devices to access resources to support their work?

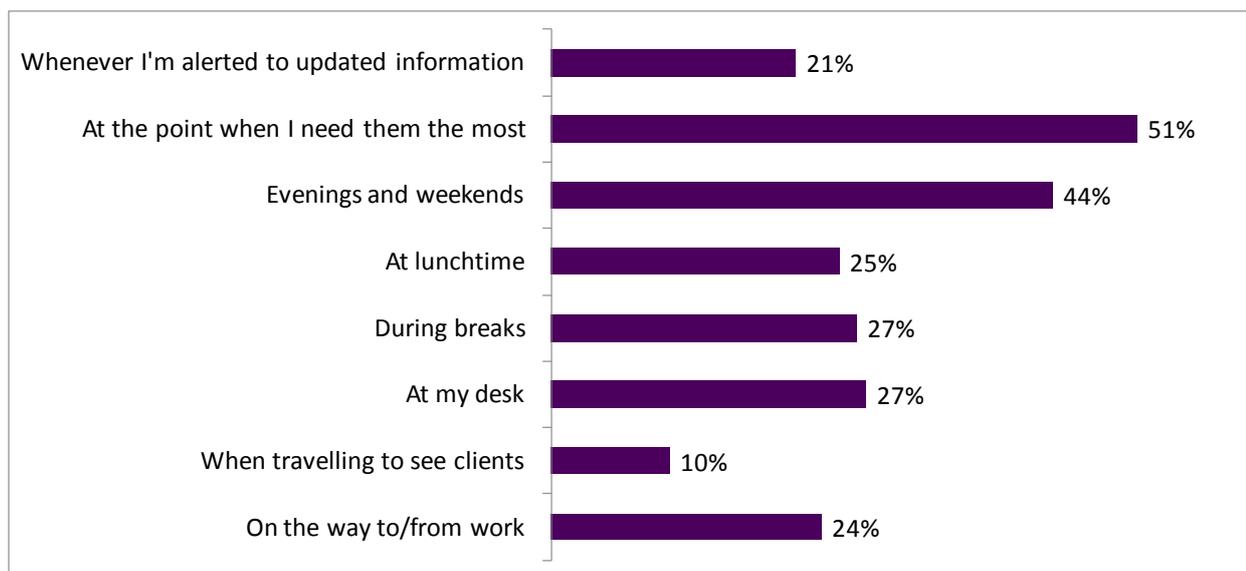
Since the mobile device gives pretty much instant access to content, more and more learners are accessing learning content outside their regular working hours. Over 4 out of 10 are accessing learning in the evening or at weekends, with almost 1 out of 4 doing so on the way to or from work.

Most importantly, mobile devices allow learners to access learning content when it is needed most, as reported by 51% of learners in the TM Learning Landscape<sup>13</sup>.

Alerts are important – with currently 21% viewing company alerts as they come in on their mobile device.

<sup>13</sup> All learner data drawn from 2,000 learners in the private sector

Figure 4 When are learners using their mobile devices?



Source: Towards Maturity Learning Landscape with over 2000 learners

Staff enjoy the flexibility and convenience of mobile working – and learning. No longer do they have to wait for the laptop to power up, but can check and respond to email, use location-specific services, join webinars, watch videos or access work-related websites as the moment presents.

Learning and development can harness this enthusiasm by:

- Incorporating new media in learning design (currently only 29% of our TM 2013 Benchmark do this)
- Producing job aids designed for the small screen to bring performance support to the point of need (only 26% of L&D teams are doing this)
- Facilitating messaging between learners and tutors (only 16% of learners have access to a tutor when working online)
- Providing content curation tools to help staff navigate learning resources (currently used in only 15% of organisations)
- Facilitating and supporting learning communities (used by 42% of companies) or communities of practice (used by 47%)
- Sending out text alerts as new resources become available or campaigns are launched
- Focusing on short, sharp topics for productivity improvement – ‘tip of the day’

Yes, top learning companies are using more mobile devices (83% vs. 71% all), but they also promote a work culture that is more conducive to mobile and collaborative learning. For many organisations, flexibility starts and finishes with allowing learners to learn ‘any time, any place’, but this is the norm that top learning companies are building on:

- 72% of top learning companies allow learners to learn at places convenient to them (44% average<sup>14</sup>)
- 77% allow learners to access e-learning provision at any time (69% average)
- 41% of top learning companies allow staff time to learn at home (21% average)

<sup>14</sup> Percentage answering seven or more on a scale of 1-9 in agreement with statement in the TM2013 Benchmark

Top learning companies are developing strategies for flexible learning that cover a much wider scope than simply the ability to access e-learning content on a mobile device. However, only half of organisations have a strategy for learning that allows for changing business priorities and even fewer regularly review their L&D programmes and check that they support and enhance organisational goals.

This resonates with the learners themselves: On average 54% would like to be able to access learning on the go, particularly those in sales (62%) and those in senior manager roles (65%). Younger staff particularly want to work in this way (67% for those under 21, falling to 42% for those over 60), although this may reflect their job role.

Almost 9 out of 10 learners state that they like to be able to learn at their own pace.

### 3.1.3 What types of apps are learners downloading?

According to the Harvard Business Review, ‘Seven shades of mobile’ 2012 report<sup>15</sup>, 19% of time spent on mobiles is spent on interacting with other people; 4% on discovery and 1% on participating in personal hobbies and interests.

Apps make much of this possible and are one of the sources of content that can support learning and performance. So how are staff using them? Although general news and information form the largest group of apps used by learners, more than one quarter are downloading apps related to education and training, with over one fifth using productivity tools.

**Table 2 Types of apps downloaded by learners**

Business-related app	Percentage of sample	General app	Percentage of sample
Business news and information	32%	General news and information	55%
Education and training	26%	Social networking	51%
Productivity tools	21%	Media and music	50%
Pod- or video-casts	18%	Books or magazines	35%
		Travel planning	34%
		Sport and leisure	32%
		Games	30%
		Personal finance	25%

But for some learners there are still barriers to be overcome:

- 8% do not know what resources are available to them
- 31% prefer to keep their work and personal lives separate
- 6% don’t want to use their monthly data allowance or pay any extra fees

17% would be happy to use their own smartphone or tablet device if the right resources were made available to them.

<sup>15</sup> <http://hbr.org/2013/01/how-people-really-use-mobile>

### 3.1.4 How are learners learning from each other?

Social or professional networks and communities are an important feature of the mobile enterprise, with 44% of learners finding internal networks and 40% finding external networks essential or very useful.

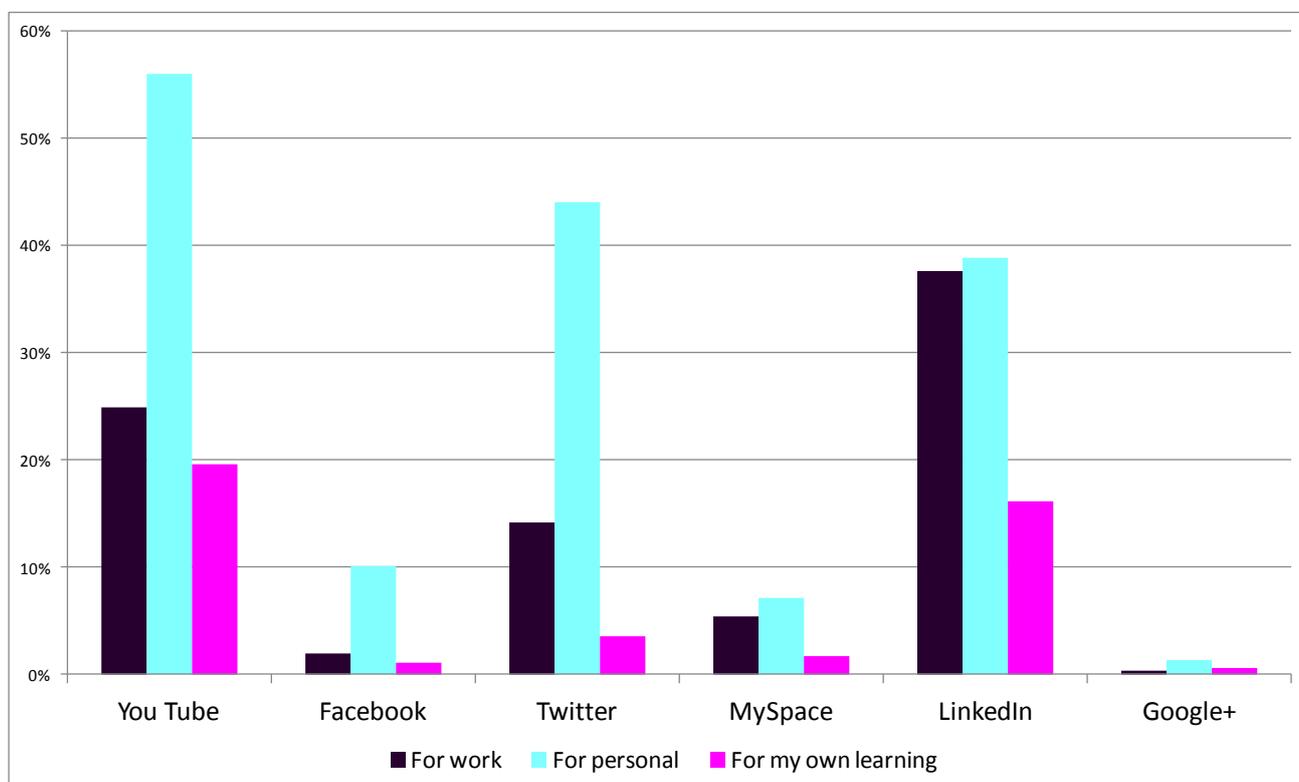
Staff are also more open to sharing their own experiences with others than perhaps we might think. 84% of learners in our Learning Landscape Study are willing to use technology to share their knowledge to help others learn with 22% of them already doing this regularly. This includes contributing to discussion rooms, uploading content such as best practice videos, recommending articles or other relevant items to others, recording podcasts, blogging or maintaining an accessible learning log. A further 62% just need help getting started, or would if they had the opportunity.

What is more, 65% of learners agree that they are motivated by using technologies that allow them to network and learn with others.

The role of the coach/mentor/buddy is a crucial one for 62% of learners to learn what they need for their job, although unexpectedly, the proportion does not vary significantly across age or length of time in job role.

Collaborative technologies are in widespread use, despite only 19% of L&D professionals in the TM2013 Benchmark reporting that they are aware of how their learners are using social media (outside of L&D) to share ideas. SharePoint and company internal network systems are the main collaborative media used in the workplace, but for personal learning, YouTube appears to be the site of choice as shown in Figure 5.

**Figure 5 Use of social media**



Source: Towards Maturity Learning Landscape with over 2,000 learners

## 4 Driving change: The L&D response

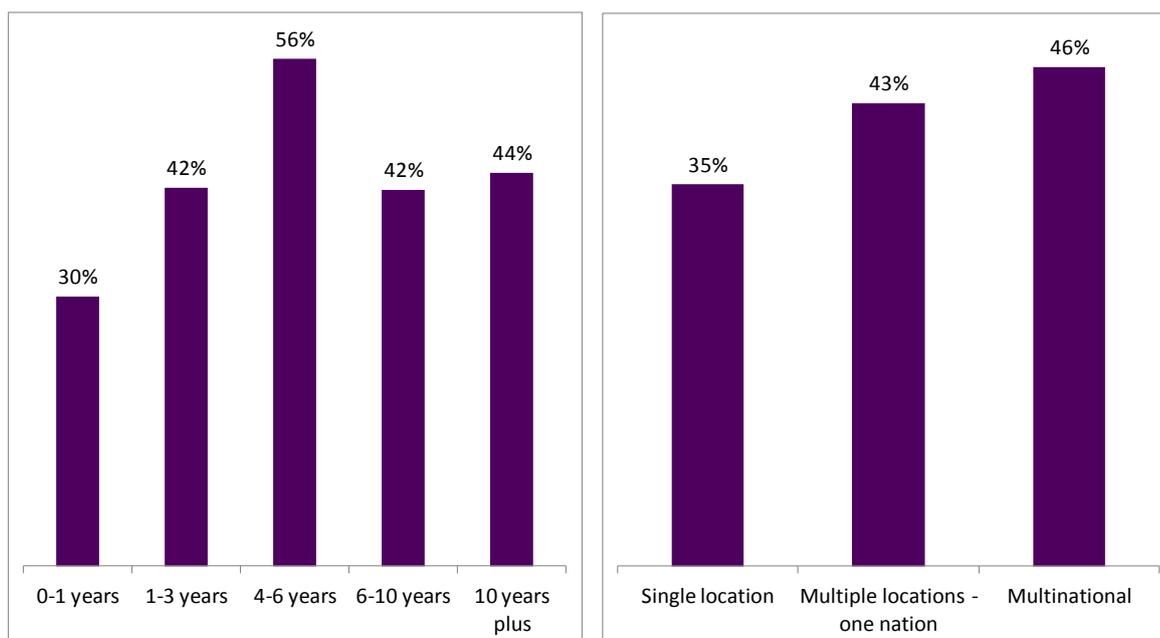
The way that Learning and Development supports staff in the mobile enterprise has to change. The mobile learner is likely to be already actively participating in learning communities, using productivity apps and reading articles or books to support their hobbies and interests. How do our learning solutions reflect what is going on in the business? Often the challenge for L&D is not so much developing new mobile content, but driving additional value out of the content that is already there.

### 4.1 What is holding us back from delivering flexible learning?

While mobile workers are leveraging the availability and features of a variety of mobile devices, Wi-Fi challenges and data limits are affecting productivity. Unreliable and variable Wi-Fi connectivity when travelling, particularly when using public transport, or when working from hotels means the mobile worker is often most productive when working from their own home<sup>16</sup>.

According to the 2013-13 Towards Maturity Benchmark Study, the perception by 43% of L&D professionals in organisations is that mobile learning is complex to support. This is particularly the case in companies with moderate experience (56%) of using e-learning and in very large (53%) or multinational (46%) organisations. This is a combination of very real concerns over security issues such as loss of data or increased possibility of viruses reported by 60%, technical restrictions due to low bandwidth, firewalls or unreliable access reported by 54%, and issues of user safety, identity or trust (for example in the case of using third-party social networks) reported by 32%.

**Figure 6 Percentage of sample perceiving that mobile learning is complex to support**



<sup>16</sup> [http://www.ipass.com/wp-content/uploads/2013/03/ipass\\_mobile-workforce-report\\_q1\\_2013.pdf](http://www.ipass.com/wp-content/uploads/2013/03/ipass_mobile-workforce-report_q1_2013.pdf)

However, there is still a head-in-the-sand mentality in 22% of organisations – simply hoping that m-learning will go away if they do nothing.<sup>17</sup>

Some of the technical complexities for L&D in the mobile enterprise include:

- Scalability – managing the very flexibility and convenience that mobile learners enjoy and the expectation that businesses are always available and responsive
- Security – where mobile devices are the weakest link in the enterprise security solution
- Service/support – where employees bring a wide range of personal devices with different capabilities, experience varied and fluctuating WiFi signals and have varied ability to benefit from collaborative and multimedia learning services

L&D in top learning companies work closely with the IT department to ensure that the technology supports their growing communication needs. 81% of top learning companies know what technology-enabled learning their systems can deliver (compared to just 43% across the TM2013 Benchmark as a whole. 86% of them have a good relationship with the enterprise IT department (compared to 48% average).

Learners themselves have a more simplistic view about the barriers to learning online, with just 33% concerned about the IT infrastructure. Having good content is more important to them, with 45% citing uninspiring learning content as the main barrier to mobile learning.

## 4.2 L&D changing priorities and perception

People on the move need to be supported in their jobs in a different way. L&D can enhance enterprise effectiveness by providing on-demand services at the point of activity and decision, at the right time and in the right place. For example:

- Company documents (e.g. quick sales guides for sales staff, technical manuals for technical staff)
- Internal processes and procedures (company specific e.g. rate calculator; shift/holiday rotas)
- Performance support at the point of need<sup>17</sup> (e.g. connecting with subject experts)

L&D in top learning companies are proactively thinking about ease-of-use of resources for staff, how to respond faster to changing business need and how to scale up their initiatives.

Compared with average, top learning companies are twice as likely to:

- Provide *access to job aids* online or via mobile devices (52% vs. 26% all)
- *Understand* how their learners are using social networks *outside work* to share ideas (46% vs. 19%)
- *Encourage* staff to work together to productively connect and share knowledge (45% vs. 18%)
- *Encourage* individuals to use their own mobile devices for learning (40% vs. 15%)
- *Provide* learners with mobile devices *for learning* (20% vs. 6%)
- Provide *access to a tutor* when working online (41% vs. 16%)

In one company in the 2013TM Learning Landscape, when asked about motivation, 6 out of 10 learners responded that they ‘simply like to learn’.

<sup>17</sup> For further analysis of the barriers reported for implementing m-learning, see In Focus: Mobile Learning at Work due for release spring 2014 [www.towardsmaturity.org/infocus](http://www.towardsmaturity.org/infocus)

### **Case Study – Engaging and motivating learners/building a learning culture in Jaguar Land Rover**

Jaguar Land Rover has always had a strong culture of learning within the organisation. Key to maintaining engagement and building on the excellent culture was the technology used to implement it.

One of the main aspects of the culture and engaging learners laid in accessibility, making content and resources available as quickly and as easily as possible. Another important aspect was the anytime, anywhere element, given the complex nature and distribution of the organisation across the globe.

When commissioning the technology used to distribute and manage learning across the organisation, the key part of the learning culture was bringing the entire learning community together, on one platform. This helped to ensure business continuity, reduce time spent on administration and created a unified engagement point for learners. Throughout the learning cycle, employees are frequently surveyed and asked what they need to help them reach their learning and development goals.

The implementation of new technologies was a critical component to fostering a learning culture, one in which making learning central to people's everyday roles was a key ethos. Through virtual classrooms, mobile learning and job performance aids, employees were encouraged to find learning and performance resources available to them, through a variety of devices, at the point they needed them.

With this combination of technologies, collaboration and the involvement of employees in the learning cycle, a strong learning culture was developed. This is further underpinned by a desire for learning in which employees feel supported in their roles, and able to progress within the organisation through strong learning opportunities while learning at their own pace, at a time which suits them.

## Top tips for supporting learning in the mobile enterprise

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### Understand the technology

- Build the relationship with the IT department and understand the real nature of the security issues
- Consider cloud-based learning management solutions

### Challenge preconceptions about your learners

- Find out what devices your learners are actually using. When are they using them and for what purpose? A Towards Maturity Learning Landscape audit can help here
- Find out how willing your learners are to use their own devices at work. What is holding them back? What skills and knowledge are your learners building in their own time?

### Overcome the barriers

- Set up one-click conferencing to encourage wider participation
- Streamline the use of multiple devices for your learners, so that they can securely use the same device for both business and personal use

### Engage in setting organisational policy

- Ensure L&D have a voice in setting the overall organisation policy on BYOD
- Ensure staff know and understand organisational flexible working policies and guidelines

### Harness the opportunities for instant communication

- Use mobile alerts to update employees about new business or L&D information
- Consider how classroom trainers or tutors can support post-course questions using messaging

### Optimise multimedia resources for mobile learning

- Provide job aids or other performance support via mobile so that staff can access information at the point of need
- Make sure staff understand what resources are available to them via their mobile devices – and that they know how to access them

### Check out the L&D team

- Do you know what mobile devices they are using and what for? How can you harness their skills purposefully?
- Build the capability of the team to facilitate collaboration / design mobile solutions / utilise the power of mobiles to capture and use short bursts of audio/video in their training

## Recommended resources and references

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### Case studies and white papers on the Towards Maturity site

- The New Learning Agenda – download the 2013-14 Towards Maturity Benchmark at [www.towardsmaturity.org/2013benchmark](http://www.towardsmaturity.org/2013benchmark)
- For articles and case studies on mobile learning go to <http://towardsmaturity.org/tag/mobile/>

### Other background reading

- <http://www.computerweekly.com/feature/Flexible-working-is-a-must-have-but-will-it-ever-be-the-norm>
- <http://mobithinking.com/blog/100-million-club>
- Harvard Business Review <http://hbr.org/2013/01/how-people-really-use-mobile>
- <http://media.ofcom.org.uk/facts/>
- Enterprise Mobility Planning Guide: Increase Mobile Productivity. Intel's guide to strengthening security and efficiency in the enterprise. September 2013. <http://www.intel.co.uk/content/www/uk/en/enterprise-mobility/increasing-productivity-for-mobile-workers-guide.html>
- [http://www.ipass.com/wp-content/uploads/2013/03/ipass\\_mobile-workforce-report\\_q1\\_2013.pdf](http://www.ipass.com/wp-content/uploads/2013/03/ipass_mobile-workforce-report_q1_2013.pdf)
- Gartner Top 10 Strategic Technology Trends for 2014 <http://www.itbusinessedge.com/slideshows/top-10-strategic-technology-trends-for-2014.html>
- Flexible working: goodbye nine to five. Institute of leadership and Management, March 2013 [https://www.i-l-m.com/~media/ILM%20Website/Downloads/Insight/Reports\\_from\\_ILM\\_website/Research\\_flexible\\_working\\_march2013%20pdf.ashx](https://www.i-l-m.com/~media/ILM%20Website/Downloads/Insight/Reports_from_ILM_website/Research_flexible_working_march2013%20pdf.ashx)
- Does working from home work? Evidence from a Chinese experiment, Nicholas Bloom, James Liang, John Roberts and Zhichun Jenny Ying, Stanford University, 18<sup>th</sup> December, 2012
- Frost & Sullivan 2013. Managing Communications for the World of BYOD: Deploying the right technology for today's mobile world.
- <http://www.cipd.co.uk/hr-resources/survey-reports/flexible-working-provision-uptake.aspx>
- [http://www.vmware.com/files/pdf/Forrester\\_2013\\_Mobile\\_Workforce\\_Adoption\\_Trends\\_Feb2013.pdf](http://www.vmware.com/files/pdf/Forrester_2013_Mobile_Workforce_Adoption_Trends_Feb2013.pdf)
- Enterprise mobility: empowering the mobile workforce. <http://www.mobiusconsulting.com/papers/EnterpriseMobility-MobiusConsulting-9-23-09.pdf>

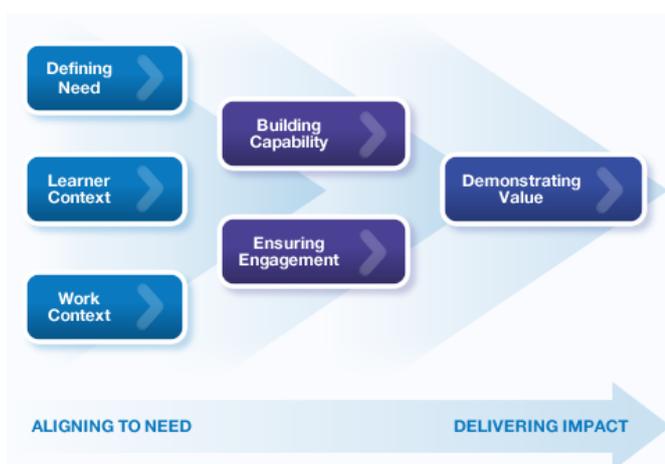
## Notes on the 2013 research

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### Data collection

Individuals with responsibility for implementing learning technologies in the workplace were invited to participate in a two-part online review between June and August 2013. 538 respondents from 481 organisations took part in the survey. Full details of the methodology are given in the TM2013-14 Benchmark Report. This benchmark research programme is sponsored by our Ambassadors, including Redware ([www.towardsmaturity.org/ambassadors](http://www.towardsmaturity.org/ambassadors)).

In past studies we have analysed the implementation activity of the more mature organisations and grouped their behaviours into six workstreams that we describe in the **Towards Maturity Model**.



These six workstreams of effective practice are at the heart of the **Towards Maturity Index (TMI)**, the single index figure from 1 – 100 that each participant in the 2013 study received to benchmark the maturity of their implementation of learning technologies.

The behaviours in the workstreams are reviewed annually with industry subject experts and practitioners to reflect the latest thinking.

Those in the top quartile of the TMI are not only achieving significantly higher impact than average but are much more likely to be working proactively to improve their implementation and integrate their learning activities into the workplace. These **top learning organisations** both exhibit and help us to define what we understand by effective practice. Organisations in all sectors and of all sizes fall into this top quartile and throughout this report we have included observations from top quartile learning companies. More detailed case studies can be found at [www.towardsmaturity.org/tag/top-quartile-learning-organisations/](http://www.towardsmaturity.org/tag/top-quartile-learning-organisations/).

### Towards Maturity Learning Landscape

Over 7,000 learners from private sector companies took part in the Towards Maturity Learning Landscape during 2013. Results from a sample from 2,000 learners (selecting every 5<sup>th</sup> learner) have been analysed in this report.



The full methodology is reported in Appendix A of the TM2013 Benchmark.

## About Redware

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*As a market leader in learning and mobile platforms, we understand that technology must work for you and your users whenever and wherever you need it. Our learning platform empowered gives your users the tools they need to learn their own way, while Redsource, our award winning mobile learning platform, delivers powerful and effective mobile learning.*

Redware was founded in 1999 and has since grown to deliver learning technologies to some of the largest and most recognisable brands in the world. Our clients have been among the first to deploy emerging learning technologies in the workplace, increasing engagement and driving the change in learning culture in progressive organisations.

Our work with clients such as Jaguar Land Rover has featured in various learning journals and media as examples of success in learning technologies and mobility.

[www.redware.co.uk](http://www.redware.co.uk)

Follow us on Twitter: @Redware

### **Redsource – the Redware award winning mobile platform**

- Leverages existing assets immediately without needing to commission bespoke apps or worry about the complexities of using HTML5
- Delivers material optimised for mobile such as videos, interactive apps, HTML5, quick reference guides and performance aids
- Gains higher engagement that aligns with company objectives by providing short form learning to reinforce traditional methods
- Anytime, anywhere access enables employees to learn and utilise necessary corporate resources wherever they are
- Automatic updates ensures content is always current with the latest versions pushed instantly to a learner's device

## About Towards Maturity

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*Towards Maturity is a benchmarking practice that provides authoritative research and expert consultancy services to help assess and improve the effectiveness and consistency of L&D performance within organisations. The Towards Maturity portfolio includes:*

### **The Towards Maturity Benchmark Study**

<http://towardsmaturity.org/static/survey/>

The Towards Maturity Benchmark Study is an internationally recognized longitudinal study on the effective implementation of learning innovation based on the input of 2,900 organisations and 10,000 learners over ten years. Towards Maturity continuously surveys and studies how people learn at work, and uses this data to help L&D professionals assess and improve the appropriateness, effectiveness and efficiency of their learning provision. Previous research papers and sector specific reports are available through the Towards Maturity Shop <http://towardsmaturity.org/shop/>.

### **Towards Maturity Benchmark Centre**

<http://mybenchmark.towardsmaturity.org/>

Applying everything we know about good practice to provide personal practical time saving advice through an online three-step continuous improvement process. Benchmark your current approach with your peers.

### **Towards Maturity Strategic Review**

<http://www.towardsmaturity.org/strategicreview>

The Towards Maturity Strategic Review is an extra helping hand to help you turn good ideas into good practice in your organisation. It helps you analyse and interpret your personal benchmark report to establish a base line and identify the next action steps for performance improvement.

### **Towards Maturity Learning Landscape**

[www.towardsmaturity.org/learner](http://www.towardsmaturity.org/learner)

The Towards Maturity Learning Landscape Study helps you understand the behaviours of your staff so you can design learning solutions that can be embedded more effectively into the workflow. It provides structured feedback across companies, locations and departments.



### **Towards Maturity Sector Benchmark groups**

[www.towardsmaturity.org/benchmarkgroups](http://www.towardsmaturity.org/benchmarkgroups)

Join senior L&D leaders in your sector three times a year to use the Towards Maturity Benchmark to support performance improvement, prioritise action planning and accelerate progress.

## Visit [www.towardsmaturity.org](http://www.towardsmaturity.org) for more information.

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