TOWARDS MATURITY

Driving Innovation in Dealership Training for the Automotive Sector

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

Raytheon

Commissioned by Raytheon Professional Services

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February 2014

Foreword by Mark Oliver, Raytheon Professional Services

There is a critical link between dealer training and the creation of engaging, memorable customer experiences. These ultimately drive loyalty, advocacy, retention and future sales. At Raytheon, we strongly believe in sharing best practices. Given the highly competitive economic environment with ever-increasing pressures on market share it is great to see the automotive sector are already well advanced in using learning technologies to increase skill levels and improve competitive advantage.

We would like to thank Toyota Motor Europe for supporting the first Industry Sector Benchmark. Having now joined the Towards Maturity Ambassador programme, we are proud to continue Toyota's good work and support this year's study.

The good news is the sector has matured over the last 3 years, and with scores above average in 18 out of 19 aspects of eLearning maturity, it is clear the automotive sector is leading from the front compared to other industries. This level of maturity only happens in an integrated approach. Of course there are still some challenges. For example, the industry is still facing a push rather than a pull in learner engagement in eLearning courses. This could be a result of our learners operating in a challenging economic environment and being strongly measured on productivity – time away from the job for training is kept to a minimum. Linking training interventions and retail KPIs that will convince line managers to embrace retail values and principals of investing in training, continues to be an area where the industry can improve.

A sincere thank you to everyone who dedicated their time to contribute to this benchmark. We feel as the sector is in a positive growth phase, it is the right time to launch this in-depth study which shares many practical insights and is an excellent source for revising status quo, areas for improvement, and defining future requirements.

Mark Oliver
Managing Director
Raytheon Professional Services

Raytheon

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This report was commissioned by Raytheon Professional Services, who also helped to shape the research.

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Fast facts from this report

Automotive manufacturers are spending 25% of their L&D budget on learning technologies (up from 20% in 2011). One-third have increased the size of their L&D teams in the same period.

- **33% of formal learning is e-enabled**
- **40% of all learning is still entirely face-to-face, down from 45% two years ago**
- **52% are using e-learning for compliance-related training with a 66% completion rate**

Automotive manufacturers are looking for achievement across a really broad range of business goals through implementation of learning technologies but fewer than half are achieving the goals they seek:

- **48% increase their on-the-job productivity**
- **38% are using IT successfully to push updated information to customer-facing staff at the point of need**
- **33% are seeing the benefit of learning technologies to help support organisational change**
- **Only 29% have increased the ongoing sharing of good practice as a result of learning technologies**

Quantifying the benefits is more difficult, but:

- **55% agree that managers recognise e-learning delivers additional business benefit**
- **45% agree that e-learning has made a significant contribution to increasing revenue**
- **39% agree that learners recommend e-learning to colleagues to improve job performance**
- **24% have noticed positive changes in staff behaviour**

However, only **2 out of 5** consider that they have clear KPIs for measuring the success of their e-learning activities. Learning technologies are having an impact across the business, staff and L&D efficiency, with average improvements of:

- **20% improvement in customer satisfaction scores**
- **11% reduction in time to competence**
- **7% reduction in staff turnover**
- **18% reduction in cost of delivery**
- **23% reduction in study time**

Learning innovation, done well, is impacting bottom line business results.

Organisations operate a range of business models for their dealer networks, with 79% having some sort of charging structure – based either on an annual/monthly licence, number of courses or number of users. 21% make no charge to their dealers. 62% do not allow external users from outside their dealer network to access their learning.

The top barrier to implementation reported this year is the cost of set-up, development and maintenance (reported by 77% - up from 32% in 2011).

2011 we reported that just 11% were using mobile learning, but 50% were planning to introduce it by 2013. This year, the proportion has actually increased to 75%.

These are just some of the statistics that caught our eye from this Spotlight report. Connect with us on Twitter using #bethebest14 to let us know what's captured your attention! @towardsmaturity

1   Introduction

In the last few months, we have seen the start of recovery in the automotive industry. In the UK, there have been 22 consecutive months of increases in the level of car sales: across the rest of Europe, demand is gradually recovering after a two-decade low[1], although sales are unlikely to return to pre-crisis levels in the short term. However, the pressure is on for those support sales, after sales or technical training in dealership networks across Europe. Competitive advantage comes to those who can respond quickly to change and roll out products and services faster. As a result, many are investigating how technology can support learning and development and facilitate business change.

Manufacturers in the automotive industry can be proud of what they have achieved in addressing the challenges of supporting training in the extended dealer network. Ensuring quality and consistency of training across the whole army of sales and service personnel in the distribution network is critical to the provision of an excellent experience for the end customer.

Automotive manufacturers have been exploiting technology-enabled learning for some years and have often been in the vanguard of innovation. They have long recognised the business value of providing essential training content online and have invested significantly in the technology and resources to continually improve their training.

In 2011, we reported[2] that the sector was using learning technologies widely to develop and deliver bespoke, self-paced content and were significantly improving learning management and administration, but were slow to exploit the emerging opportunities offered by virtual classrooms, mobile and collaborative learning. The technology environment has changed so much over the last two years and those who have embraced that change are seeing the benefits of refreshing their learning strategies on both the business bottom line and on learner – and customer – satisfaction. How has the sector moved forward in the last two years? Has it realised the hoped-for potential of technology-enabled learning?

Over the past five years we have reported through our annual cross-industry Towards Maturity Benchmark that one of the consistently biggest challenges for L&D staff was their lack of knowledge of the potential use and implementation of technology. The range of technologies and delivery media available is ever increasing, but how can we navigate successfully through the technology options and choose which to include in the blend?

The amount of information available to the busy L&D manager or dealer principal is exploding, but how can this be harnessed in order to make better decisions? That's what this report aims to find out. We look at what OEMs are currently doing with their dealer training programmes and how successfully learning and development professionals feel that their programmes are performing. We investigate what is driving change and the challenges which are holding the sector back. We consider the implementation practices that lead to the best results in terms

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[1] Automotive News Europe: http://europe.autonews.com/article/20140318/ANE/303189976/european-car-sales-rise-8-in-february-as-regions-economy-revives http://europe.autonews.com/article/20140128/ANE/301289939/growth-of-2-forecast-for-europe-car-market
[2] Towards Maturity Automotive Benchmark study 2011 http://www.towardsmaturity.org/article/2011/12/01/first-european-study-reveals-new-automotive-sector/

of business performance and provide insights from some of the leaders in the industry into how they see things changing in the future.

By comparing the automotive sector with other industries in the private sector and uncovering strengths and weaknesses in approach, we hope that this report will lead to new ideas to realise the potential of technology and raise awareness amongst business leaders.

This independent study was commissioned by Raytheon Professional Services and is being carried out by Towards Maturity, a not-for-profit benchmarking practice, and builds on their benchmark research over the last ten years with over 2,900 organisations. It was designed with input from independent experts and practitioners. It explores the drivers, barriers, benefits and trends in the use of learning technologies in dealer training to understand what is working well and what is not. It also investigates the extended audience, programmes and business models and provides an action plan for increasing dealer training programme effectiveness.

The aim of the research is to help all participants and the industry as a whole understand the opportunity and improve the impact of learning technologies in the workplace. For those who have already embedded learning technologies across their dealer network the evidence presented in this report can help to build a better business case and increase board level accountability.

We would like to thank all those who contributed to this research and particularly those who shared their detailed perspectives in the mini-case studies in this report.

Definition

For the purpose of this study we define the term e-learning and/or learning technologies as: *"The use of any technology across the learning process, including skills diagnostics, learning delivery, support, management (of learners and content), informal and formal learning."*

2 About this research

2.1 The evidence is mounting

In 2011, the automotive sector benchmark "Driving results with learning technologies in the automotive sector" reported on general training activity within 15 of the largest automotive manufacturers in Europe. Whilst technology was rapidly improving the potential to quickly disseminate new product and technical information to the wider dealer network, the not-so-good news was that not enough of the learner population had access and good connectivity to computers or could set aside the time they needed for learning.

However, the evidence is mounting that **learning innovation, done well, is impacting bottom line business results.**

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**[1].

The 2013 Towards Maturity Benchmark showed that in a sample of more than 550 organisations from all sectors, the expectation of benefits that organisations are looking to achieve with learning technologies is significant with:

- 24% increased ability to change procedures and products
- 17% improvement in customer satisfaction
- 13% reduction in time to competency
- Whilst reducing cost of learning delivery by up to 17%

However, not everyone is delivering the results they needed. Analysis of the activities leading to success in top learning companies can provide a blueprint for accelerating progress for all. We define *top learning companies* as those that are in the top quartile for the Towards Maturity Index (see references for further detail). Top learning companies set the benchmark to aspire to in terms of benefits that can be achieved from technology-enabled learning. Top learning companies are **over 4x** more likely to report:

- Improved staff motivation and engagement
- Improved speed of response to business change
- Improved ability to engage new types of learners

and **over 3x** more likely to report:

- Improvements in productivity
- Faster application of learning points in the workflow
- Increased ability to tailor learning programmes to need
- Improved talent/performance management
- Improved sharing of good practice
- Improved support for organisational change

when compared to those in the bottom quartile.

> **Towards Maturity benchmark values**
>
> - 26% improvement in staff satisfaction
> - 18% reduction in staff turnover
> - 16% increase in productivity

Clearly, it is worth investigating what the top performers across all industries are doing differently to enhance L&D results in dealership training in the automotive sector.

2.2   Participant overview

Automotive OEMS were invited to take part in a two-part reflective study between June and August 2013:

Part one: A confidential online review of current dealer training programmes
Part two: An optional telephone interview to discuss some of the implications of the research findings and with the potential to highlight achievements through a more detailed case study.

22 major manufacturers took part in this study including:

- Fiat
- GM
- Honda
- Jaguar LR
- Kia
- Lexus
- Mahindra
- Maserati
- Nissan
- Opel
- Renault
- Skoda
- Seat
- Ssangyong
- Toyota
- Volvo
- Volkswagen

A total of 52 respondents took part in the online study representing 44 organisations from 19 nations (UK, Austria, Australia, Belgium, Brazil, Canada, Czechoslovakia, Germany, Hungary, India, Italy, Netherlands, Poland, Romania, Serbia, Spain, Sweden, Switzerland and Turkey). 76% of those who took part were senior managers in HR or Learning and Development.

60% of respondents worked within central HR/L&D departments: 40% worked within a line of business outside HR/L&D. Most organisations had many years experience of working with technology-enabled learning, but there were still a number who were new to their use.

Figure 1 Length of time working with technology-enabled learning
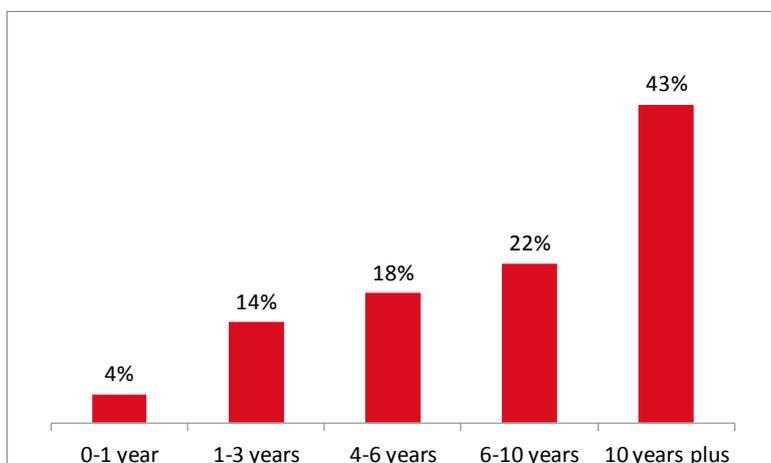
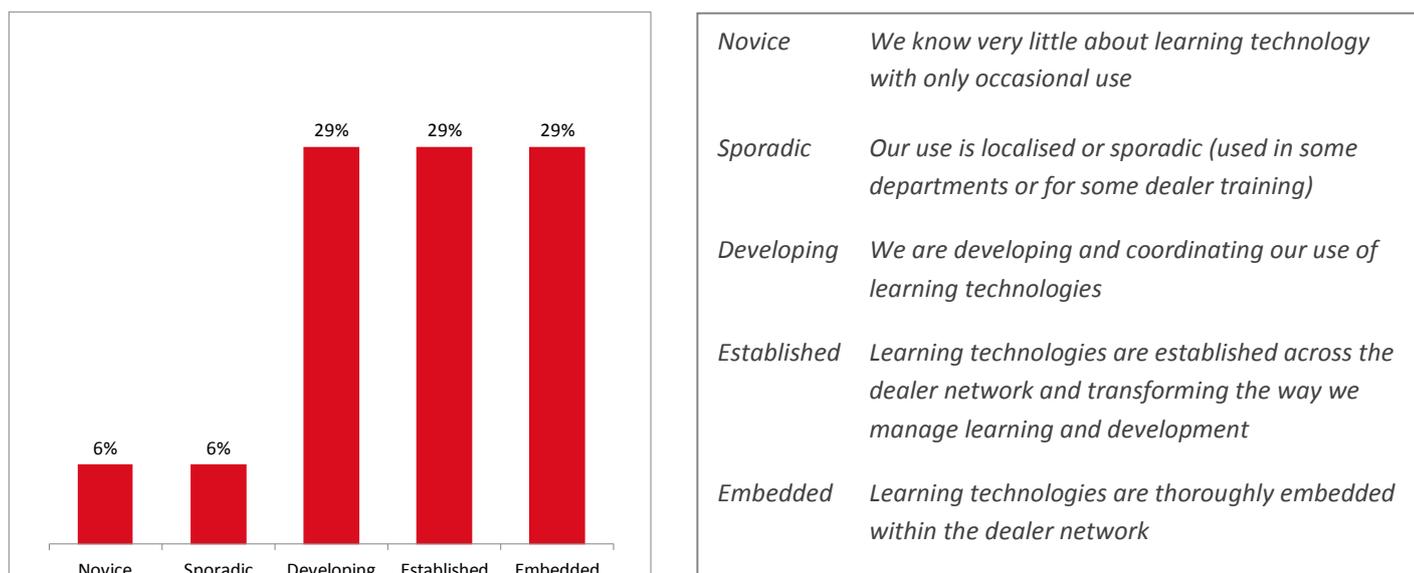# 3   State of learning in the motor industry

3.1   An e-mature industry

Over the past ten years of research into effective learning practices, Towards Maturity has found that those who have thoroughly embedded technology into all aspects of learning and development and are well aligned with the goals of the business, are achieving significantly higher results than most.

In this study, we asked respondents to self assess their e-maturity on a five-point scale, in order to dig a bit deeper into what the mature organisations are doing differently and if they were achieving better results. Unusually for a study of this type, instead of the expected bell-shaped curve as reported in 2011, we find a majority of respondents from the automotive sector now fall into the Established and Embedded categories – an early indication of the maturity of the sector.

Figure 2 Distribution of respondents across the five e-maturity categories

|	
Novice	*We know very little about learning technology with only occasional use*
Sporadic	*Our use is localised or sporadic (used in some departments or for some dealer training)*
Developing	*We are developing and coordinating our use of learning technologies*
Established	*Learning technologies are established across the dealer network and transforming the way we manage learning and development*
Embedded	*Learning technologies are thoroughly embedded within the dealer network*

The number of respondents in this study were not sufficient to be able to present a detailed analysis of differences at this level of granularity, but we are able to compare those who are Less Mature (Novice, Sporadic or Developing categories) versus those who are More Mature (Established or Embedded categories). Although successes on the scale of an individual learning programme are encouraging, when technology is embedded into the learning culture of the whole organisation we see transformation of the whole business taking place.

3.2   A commitment to resource allocation

Although understandably there were those who preferred not to disclose their budget, the sector not only enjoys above-average budget of 5m Euros for learning and development and spends above average on each hour of e-learning content (12,000 Euros), but there were a higher proportion of respondents with the information at their fingertips and able to answer this question than across the 2012/13 Benchmark as a whole.

30% saw their budgets reduced over the last two years – although another 30% had an increase. Looking to the future, expectations are quite buoyant with many anticipating an increase in overall training budget.

Figure 3 Change in overall training budget
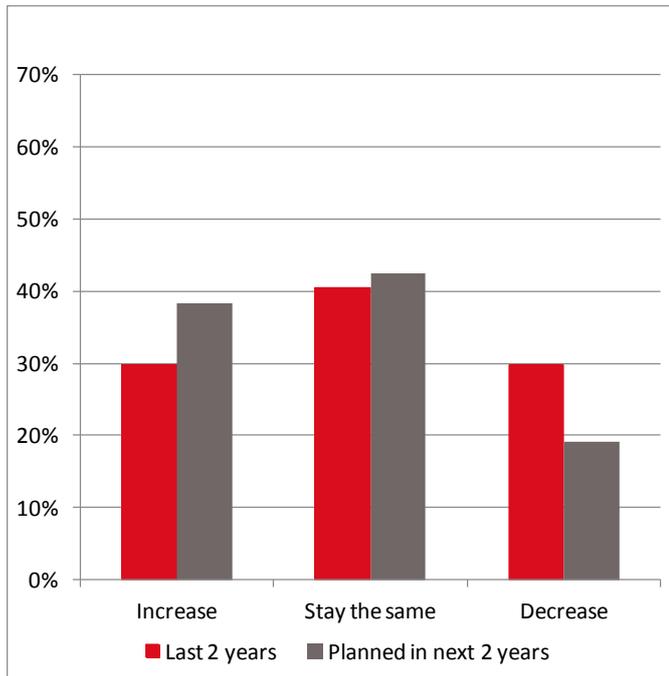
Change in planned proportion allocated to technology
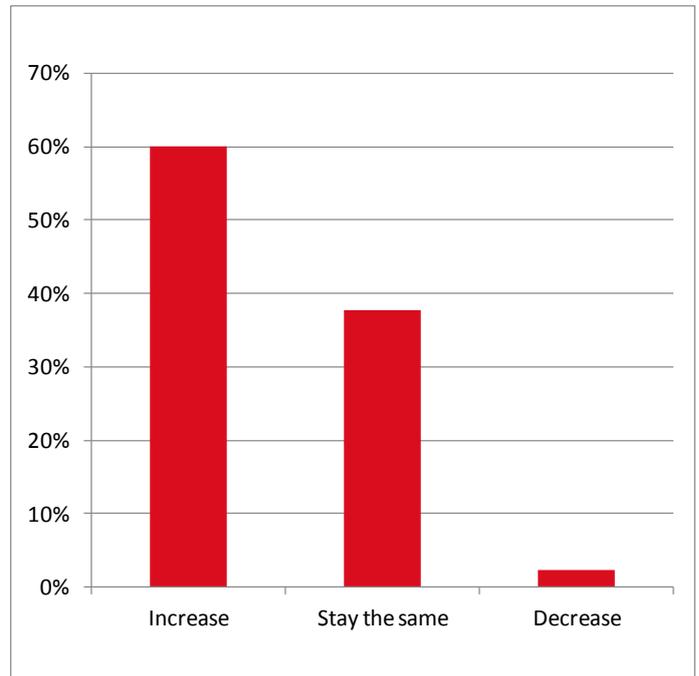
Questions: Has your overall L&D budget increased or decreased in the past two years? How do you expect your overall L&D budget to change in the next two years?

On average, automotive manufacturers are spending some 25% of their L&D budget on learning technologies (compared with 20% in the 2013/14 Benchmark). However, averaging disguises the extremes where some organisations allocate none and others 100% of their training budget.

98% predict that this proportion will increase or at least stay the same over the next two years.

Figure 4 Percentage of learning programmes supported by technology
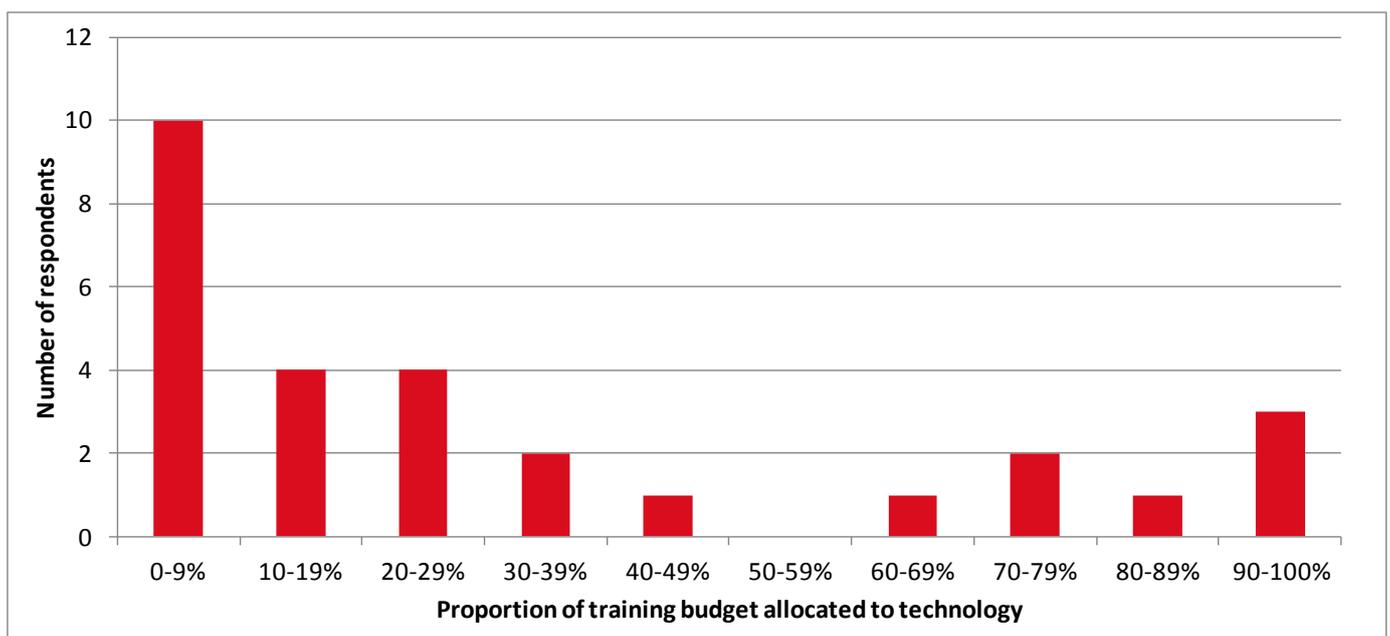
On average, some 33% of formal learning is e-enabled (compared to 26% across the 2013/14 Benchmark) with results similar to the population as a whole:

- **52%** using e-learning for compliance (57% all)
- **37%** using e-learning for non-mandatory training (32%)
- **66%** completion rate for compliance training (68% all)

Expanding Learning and Development

During the past year success has changed the ethos of training. Business changes have been positive and are outstripping performance. There has been no negative impact from the global economic slowdown.

One major manufacturer is expanding at an enormous rate, with a proportional increase in the number of new starters. Their L&D function now has more money and funding to provide:

- Resource within training (personnel)
- Providing support to markets centrally – and driving it out locally.

3.3   A confident team

In many of the OEMs, Learning and Development teams are looking after the needs of many thousands of people across multiple markets and languages.

Whilst there is no room for complacency, learning and development teams in the automotive sector are more confident in the use of new technology than many:

- 65% agree that they understand the project management processes required for effective design, development and delivery, including both traditional and agile processes (59% reported in the full 2013/14 Benchmark)
- 39% agree that L&D staff are confident in incorporating the use of new media in learning design (29%)
- 39% agree that L&D staff have the right skills to design solutions that exploit learning technologies to business advantage (29%)
- 35% agree that L&D staff have skills to deliver courses via virtual classrooms (29%)

Classroom trainers in this sector are also well prepared and using technology to enhance face-to-face learning and extend learning beyond the classroom:

- 50% agree that face-to-face training actively builds on knowledge gained through e-learning courses (28%)
- 50% agree that face-to-face training integrates learning technologies (26%)
- 40% involve classroom trainers in the design of e-learning courses (43%)
- 33% train classroom trainers to use technology to extend learning beyond the classroom (26%)

One-third of OEMs have increased the size of their L&D teams over the last two years, and many are planning to increase further over the next two years. This increase is greatest in the less e-mature organisations.

Figure 5 Changing L&D team size
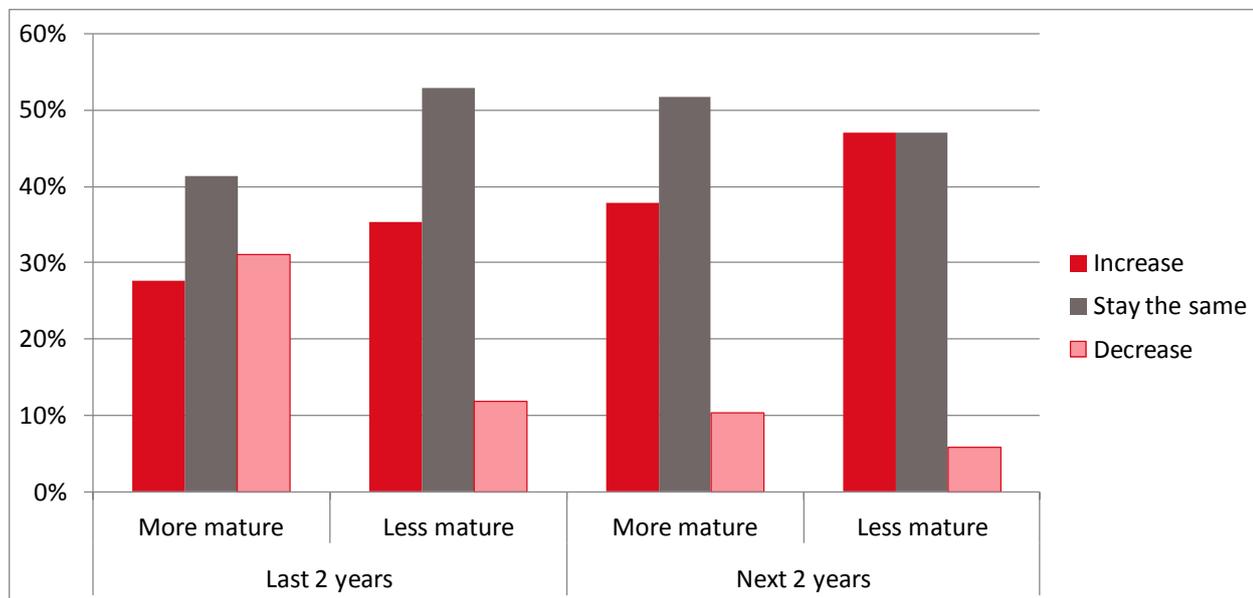
Questions: How has your overall L&D team size changed in the last two years? How do you expect your overall L&D team size to change in the next two years?

> *"We now have fewer dedicated trainers due to economic pressures and the trend towards outsourcing training is increasing. Our challenge is to keep a high level of training with a broader reach - and we use more e-learning to meet this challenge." Toyota Motor Europe*

3.4   Room for improvement

Despite these positive signs and the progress made in the sector since our 2011 report, there is not only a wide gap between the results of the highest performing organisations and the rest, but there is a significant gap between hope and reality. Whilst the perception from those in the sector is that this is an e-mature sector, the results indicate that there are still lessons to be learned.

Learning and Development Challenges at Kia

The two main markets for Kia are the USA (dealt with through a huge dedicated training facility in Dallas) and Europe. With no-one yet in post with overall responsibility, L&D across Kia Europe is handled by the Network Development team (of which three out of the 13 are L&D) and a business manager. This team has to meet the needs of 20,000 people across 28 different markets.

There is little recognition by Kia that they need to do L&D for skills development – it is seen as a cost and not value. This is beginning to change after six years, but Kia currently fire-fights and does not employ strategic thinking in its approach to L&D. They have a low level of looking at staff and how they learn, and this is mainly down to the organisational culture and the value placed on stable, long term employment experience within Kia. Benchmarking with others in the sector can open up discussion, and demonstrate the potential for improvement – helping to shift

attitudes towards appreciating the business value of L&D rather than counting its cost.

In the Towards Maturity Benchmark Study, effective implementation practices are encapsulated in a single value – the Towards Maturity Index (TMI) – which has been developed by Towards Maturity in consultation with industry experts and ten years of research into aspects of good practice with over 2,900 organisations.

Each respondent in this study received their own TMI score as part of a personalised benchmark report. As reported earlier, across the 2013/14 Benchmark as a whole, those in the top quartile for TMI are achieving higher programme impact, better alignment with business and strategic goals, better engagement with learning stakeholders and are better able to demonstrate the added value of their learning interventions. Statistically, we would expect an even distribution of scores between the four quartiles for the sector, but in this study, automotive manufacturers are predominantly falling in the third and fourth quartiles.

Figure 6 Distribution of automotive respondents according to the Towards Maturity Index
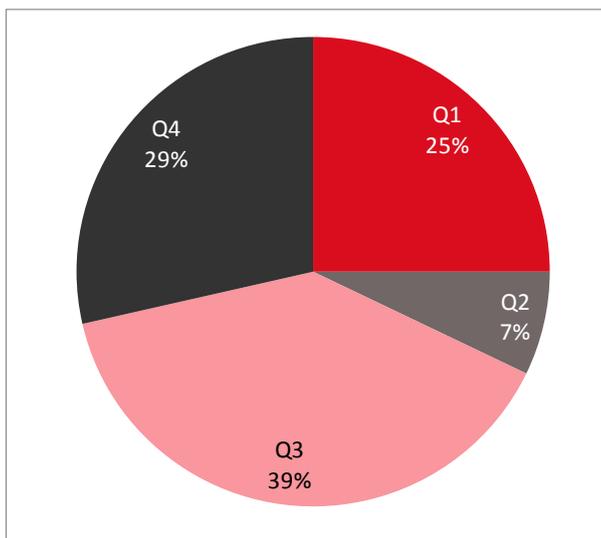
The comparison of implementation approaches with others in the industry and beyond, helps identify priority areas for action. In the rest of this report we explore the following aspects, and make recommendations for improvement from practical examples:

- Programme drivers and benefits
- Reaching and engaging the audience
- Overcoming barriers to progress
- Technology in the blend
- Implementation practices

4   Drivers for change

4.1   Setting realistic business goals

Business expectations from technology-enabling dealer training are high. Automotive manufacturers are looking for achievement across a really broad range of business goals. They want to improve programme impact, alignment to business, training efficiency, workforce productivity, customer satisfaction – the list is comprehensive.

Top business goals (cited by over 93% of respondents)

- Increase learning access and flexibility (100%)
- Improve customer satisfaction (98%)
- Increase the ongoing sharing of good practice (98%)
- Improve staff satisfaction to aid retention and motivation (96%)
- Increase ability to adapt programme to individual need/context (96%)
- Speed up and improve the application of learning back in workplace (96%)
- Develop a better qualified workforce (96%)
- Help implement new processes or new products (93%)

The *least* important drivers are:

- 82% comply with new regulations and legal requirements
- 80% support organisational change
- 69% Inform our customers and suppliers of new products and services
- 69% help implement new IT systems

The reality tells a different story, however, with fewer than half achieving the business goals they seek. Indeed, for some of these goals, the proportion falls to only one-third. Does this suggest a lack of focus or prioritisation? Are expectations unrealistic, or do some of those in L&D fail to keep their end goal in mind when they get into the detail of the day-to-day training activity?

The potential benefit for technology-enabled learning is clear, but the challenge is to consistently achieve these goals and close the gap between expectation and reality. Business goals that are not achieved, or are only achieved in part represent a considerable risk to the organisation.

Only 33% are seeing the benefit of learning technologies to help support organisational change

Only 38% are using IT successfully to push updated information to customer-facing staff – the end learner – at the point of need

Only 29% have increased the ongoing sharing of good practice as a result!

The good news is that this sector is outperforming most other private sector organisations in achieving their business goals.

Increasing scope of training activities within Nissan Europe

"The pressures on the L&D team come from the timing pressures on the cycle of new products. Everything is focused based around that product cycle. Therefore it can impact upon other products and activities.

To address the areas of improving services and retaining employees Nissan has increased the scope of training activities – not just product training. We are training to engender loyalty and commitment to the brand, instilling values. This improves customer service quality and improves customer retention. It also adds loyalty and motivation to the brand for the employees which means higher quality and commitment – this reduces staff turnover helping to keep knowledge and experience within the organisation.

The impact on L&D has been that they are not only imparting knowledge but motivating employees by following up on the training. This means their role has been to facilitate collaboration and deliver performance support."

Technology Learning Manager, Nissan Europe

Figure 7 Achievement of business goals

The total bar length indicates the proportion of the sample seeking each business goal. Light shading highlights those goals that have been achieved.

Business goal	Percentage wanting and achieving benefit	Percentage wanting but not yet achieving benefit
Improve talent/performance management	22%	93%
Push updated information to employees at the point of need	38%	93%
Increase the ongoing sharing of good practice	29%	98%
Reduce time to competence	40%	93%
Speed up/improve the application of learning in workplace	36%	96%
Provide a faster response to changing business conditions	24%	89%
Engage new types of learners	20%	82%
Inform customers/suppliers of new products/services	38%	69%
Support organisational change	33%	80%
Help implement new IT systems	20%	69%
Improve staff satisfaction to aid retention and motivation	24%	96%
Improve customer satisfaction	40%	98%
Increase on the job productivity	42%	93%
Help implement new processes or new products	73%	93%
Comply with new regulations and legal requirements	38%	82%
Develop a better qualified workforce	42%	96%
Increase ability to adapt programme to individual…	38%	96%
Increase learning access and flexibility	53%	100%
Improve induction process	36%	87%

"Automotive is a very competitive environment and margins are shrinking all the time. There is a constant demand to see increased sales as soon as a new product launch is done. Efficiency and cost are paramount." KIA Europe

Table 1 Achievement of business goals relating to dealer performance

Business Goal	% Desiring Business Goal Automotive	% Achieving Business Goal Automotive	% Achieving Business Goal Private sector average 2013/14
Help implement new processes or new products	93%	73%	47%
Increase on the job productivity	93%	42%	30%
Improve customer satisfaction	98%	40%	31%
Reduce time to competence	93%	40%	24%
Push updated information to dealer staff / employees at the point of need	93%	38%	29%
Inform dealers (customers/suppliers) of new products and services	69%	38%	27%
Provide a faster response to changing business conditions	89%	24%	21%

Some areas prove more difficult to achieve in full. Business goals relating to affecting a change in staff attitudes, behaviours or workplace culture appear to be the most elusive.

Table 2 Business goals relating to the learner

Business Goal related to the learner	% Desiring Business Goal Automotive	% Achieving Business Goal Automotive	% Achieving Business Goal Average Private sector 2013/14
Develop a better qualified workforce	96%	42%	32%
Increase ability to adapt programme to individual need/context	96%	38%	21%
Speed up and improve application of learning back in the workplace	96%	36%	19%
Increase the ongoing sharing of good practice	98%	29%	22%
Improve talent/performance management	93%	22%	20%
Engage new types of learners	82%	20%	17%

Training efficiencies are apparently more likely to be achieved, but we still see a real gap between expectation and reality. Despite the fact that 100% of respondents are using Learning Management Systems of some form or other, only 44% are finding that they are achieving the improvement of management and administration they seek.
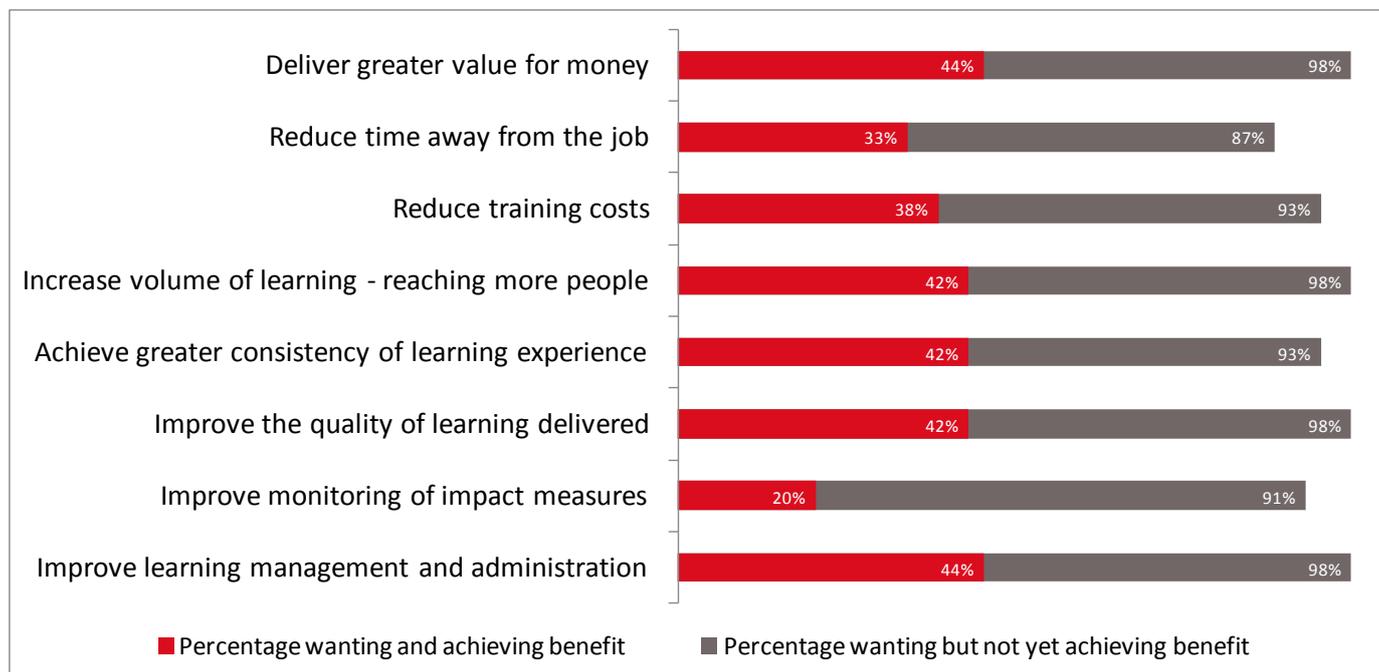
L&D as agents for change in a major automotive manufacturer

The financial downturn in recent years has meant that the playing field has become more competitive across Europe. Dealer sales have fallen and turnover has increased resulting in them not investing in training for fear it might negatively impact on productivity. Their focus is on Return on Investment and everything has to be quantifiable and measured.

Most of the dealerships don't have a strategy to understand the programme ROI. The biggest problem is that L&D are not equipped to have those conversations. L&D becomes a professional cul-de-sac – under pressure to cut costs rather than increase their added value. The company support their dealers in initiatives to demonstrate ROI, measuring the bottom line impact on sales and speed of product rollout.

However, budget has increased seven-fold over the last six years and this has been achieved by challenging senior managers and clearly articulating the benefits and achievements of learning and development. Proactive communication, for example to influence the culture and attitudes of new executives as they come on board, helps position L&D as 'change agents' that add real value to the business.

Figure 8 Training efficiencies sought - and realised

Efficiency sought	Percentage wanting and achieving benefit	Percentage wanting but not yet achieving benefit
Deliver greater value for money	44%	98%
Reduce time away from the job	33%	87%
Reduce training costs	38%	93%
Increase volume of learning - reaching more people	42%	98%
Achieve greater consistency of learning experience	42%	93%
Improve the quality of learning delivered	42%	98%
Improve monitoring of impact measures	20%	91%
Improve learning management and administration	44%	98%

What are the actual levels of improvement that we can realistically expect?

Towards Maturity have been gathering tangible evidence of impact from over 750 organisations over the past three years and the automotive sector is achieving similar levels of improvement to others. This gives us really robust evidence to help build the business case for new investment in learning technologies.

4.2   Delivering impact on the organisation

Not all respondents were able to quantify the impact their programmes have, but 4 out of 5 were in strong agreement with at least one of the following statements and not one person disagreed with them all:

% agreeing[3] with the statement:

- **55%** managers agree that e-learning delivers additional business benefit
- **45%** e-learning has made a significant contribution to increasing our revenue
- **39%** e-learning has contributed to improvements in productivity across the organisation
- **39%** learners recommend e-learning to colleagues to improve job performance
- **32%** learners put what they learn into practice quickly.
- **24%** we have noticed positive changes in staff behaviour

33 respondents attempted to quantify the benefits and the tables overleaf indicate the scale of improvements reported.

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[3] Responding 7 or above on a Likert scale of 1 to 9

4.3   Quantifying the benefits of technology-enabled-learning

Cut out and keep - A one page summary of benefits

1. Business impact indicators	Average % Improvement (automotive)	Private sector average
Our ability to change procedures or products has improved by:	20%	17%
Our measure of customer satisfaction has improved by:	20%	16%
Our ability to speed up the rollout of new IT applications has improved by:	33%	22%
Learning interventions have increased organisational productivity by:	16%	10%

2. Staff impact indicators	Average % Improvement (automotive)	Private sector average
Our measure of staff satisfaction/engagement has improved by:	22%	17%
Reduction in time to competence	11%	11%
Qualifications gained by staff have increased by:	24%	15%
We have reduced staff turnover by:	7%	8%

3. Efficiency indicators	Average % Improvement (automotive)	Private sector average
Reduction in cost of delivery	18%	13%
Improved volume/reach of training	18%	17%
Reduction in delivery time	21%	20%
Reduction in study time	23%	17%

NB. The figures given in the above tables are conservative estimates averaged from the responses of between 17 and 33 automotive sector respondents who were able to quantify these benefits. We asked: "Where possible, we invite you to quantify the benefits listed earlier that you attribute to the use of learning technologies, compared with more traditional classroom training methods. Consider a particular training initiative that you have delivered with the aid of learning technologies. If you can quantify an actual figure, please indicate if you are measuring or estimating these imrpovements."

5   Audiences and business models

5.1   Reaching the people that count

The main groups of learners in the dealer networks are the customer-facing sales and after-sales services staff and those in technician roles.

- 92% offer training for customer-facing sales staff
- 84% for after sales staff
- 52% offer apprenticeship programmes

In 2011 we reported that 57% of directors or senior managers were using e-learning: with the focus in this study on dealer training programmes, we found that 50% offer specific e-enabled training programmes to dealer principals, but only 42% include directors/senior managers within the OEM.

Figure 9 Who is using your e-learning services?

Question: Who is using your e-learning services? Please tick all that apply. n=26

Engagement with dealer principals is a major influence on take-up of training programmes across their wider staff networks and several OEMs offer incentives to dealers to encourage take-up. Examples vary by country, but include links to awards or certification, bonus schemes and rewards. One OEM mandates courses as a pre-requisite for attending global launch events. Another operates a quality margin payout if the dealer reaches certification levels and completes all their mandatory training.

> *"We offer a representation reward for three business areas. One area is related to being fully trained according to their learning path."*

Overcoming barriers to change in learning

Three to four years ago Toyota Motor Europe found that new ideas, new technologies, new trends in learning and new economic circumstances were opening up new learning opportunities. However, it was essential to get all of their ducks in a row before embarking on change. Toyota were keen to understand the wider context on the impact of their strategy for their retailers and customer facing staff - the whole strategy is dependent on the content, the technology AND the people

One of the changes that they made was to simplify the technical e-learning program that was considered too complex, courses were too big, and too difficult to update. Their LMS system was scheduled for a major update. It took 2½ years to chop the content, add new content, translate and reassemble it in such a way that it could be more easily updated in the future. Similarly it was a long process to update the LMS system and roll out across the network although the same teams of people were involved in the upgrades which allowed staff to apply lessons learned from the past and to build on the future from their experiences.

It was also essential to train and communicate and manage the change for the people!

The last missing ingredient was to find out what's going on in the retail network. These staff are not directly Toyota employees and do not have direct access to the retail network from headquarters. To understand their needs more effectively, Toyota launched a retailer-wide Learning Landscape Audit with Towards Maturity to collect information on how each job function finds information they need to do their job, what devices they have access to, who and what motivates them to learn. The study looked at questions relevant to content, technology and people and gathered information from all markets, job titles and across 25 languages to understand the impact of online learning in different languages. Some of the key findings included:

- Toyota has a strong learning culture: 84% would recommend online learning to others as a result of their experience
- 77% are willing to use technology to share and to help others learn – rising to 85% for those in sales roles
- 97% of diagnostic technicians are provided with a bespoke tablet or PC for technical training and information
- 63% own a smartphone or tablet
- 20% currently use their own mobile devices to access resources to help them do their job better – rising to 40% of those in sales management roles

This detailed insight is helping Toyota to shape their ongoing L&D strategy and devise content and communication plans to support the network moving forward.

*Customer Service Training, Toyota Motor Europe*

5.2   E-enabling skills and learning

With the emphasis for the OEMs in this study on sales and customer-facing staff in the dealer networks, the top 5 skills most likely to be offered are:

1. Technician training - general (100%)
= Product training – technical (100%)
3. Company specific skills (97%)
4. Product training – sales (96%)
5. Customer handling/service (86%)

These skills are mostly unique to this sector and linked to the specialist knowledge required by those in technician and customer-facing sales roles. However, there are potential savings to be made, as despite the volume of training taking place in these skills areas, these are not always supported with e-learning courses or other learning technologies.

Figure 10 Specialist programmes that are currently the most likely to be supported with learning technologies
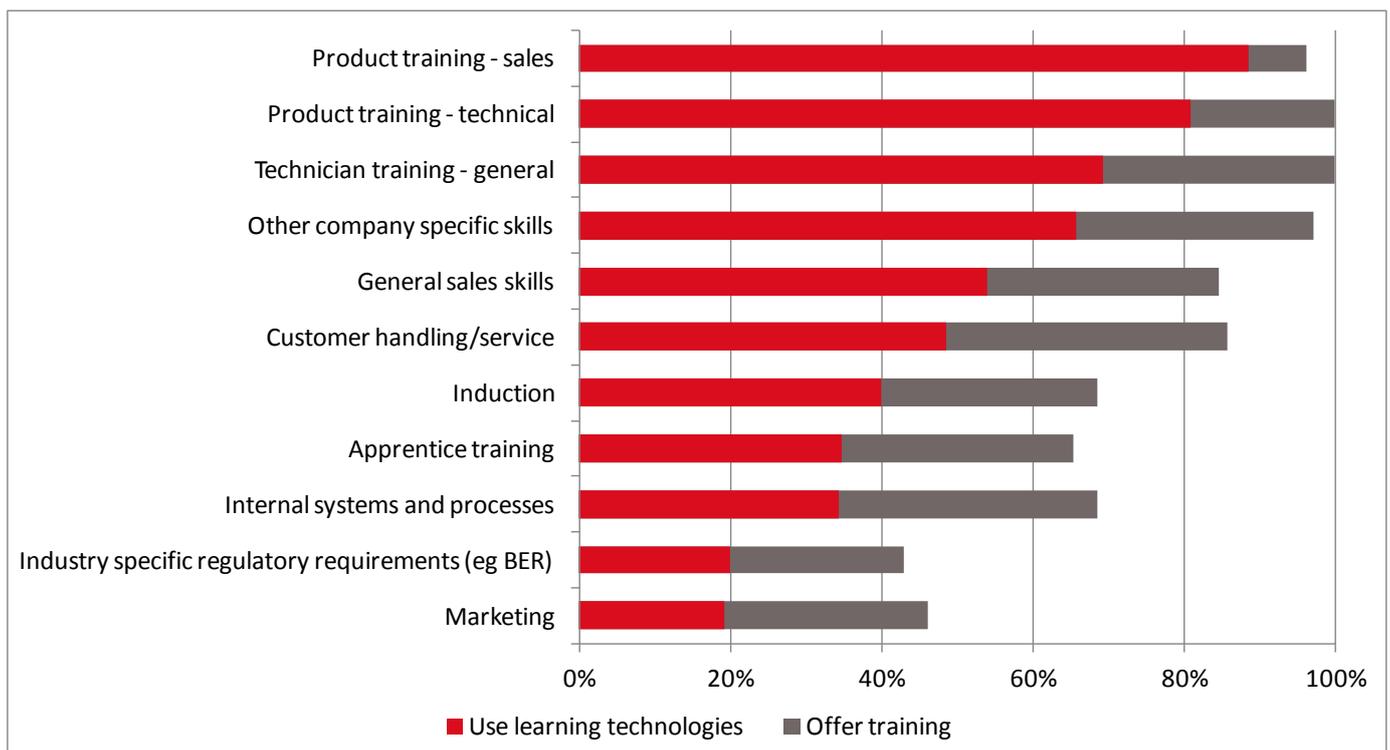
n=26

In terms of the company specific training for product and technical training, a number of organisations offer certification schemes:

- 35% leads to nationally recognised qualifications (down from 58% in 2011 report)
- 58% offer manufacturer-specific formal qualifications (68% in 2011)

    "We use e-learning, (Video, WBT, VCT's) more for introducing topics and getting the information to the market quickly before the launch of a new program or product."

Several adopt an Academy model:

"In Volvo, we did a study two years ago on what a corporate university would look like but the business case didn't support it, so we established a virtual academy instead. We have a small team of learning architects/specialists who develop competency activities and quality activities. We provide these across disciplines – purchasing/manufacturing/R&D/finance/quality etc."

"We implemented the new Nissan Academy Europe in April 2013 (formerly Network Training). We train sales advisors, service advisors and technicians – sales training, professional training, service training and technical training (fix/repairs)."


Technical training with Toyota

Toyota Repair Support asked Technical Training to get involved when the number of calls increased from local support teams. This increased the requirements and work load for trainers.

They have overcome the problem by using quality e-learning content for theory and more selective classroom training where high level skills are required, focussing on case studies for theory application and difficult diagnostics.

Customer Service Training, Toyota Motor Europe

For general training, the most likely skills to be e-enabled are, in common with companies across all industry sectors, general IT/web user skills and health and safety, with 53% of all training in these areas e-enabled.

**Figure 11 General training programmes undertaken by staff in the dealer network**
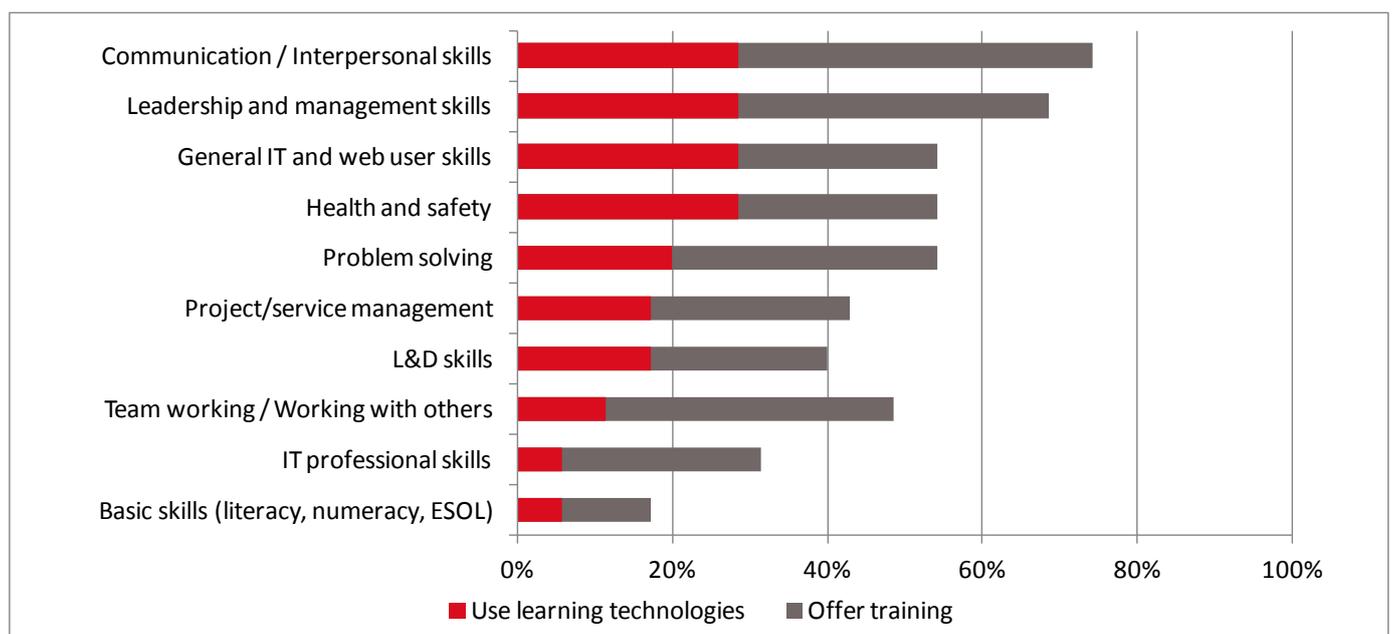
n=35

5.3   Delivery models

Learning technologies have increased the possibility for learning content and services to be developed centrally and distributed to country or regional centres, in the confidence that programmes will be consistent and meet the accuracy and quality required. 25 respondents provided details of the delivery model they are using as shown in Figure 12 below.

Figure 12 Delivery models for learning services
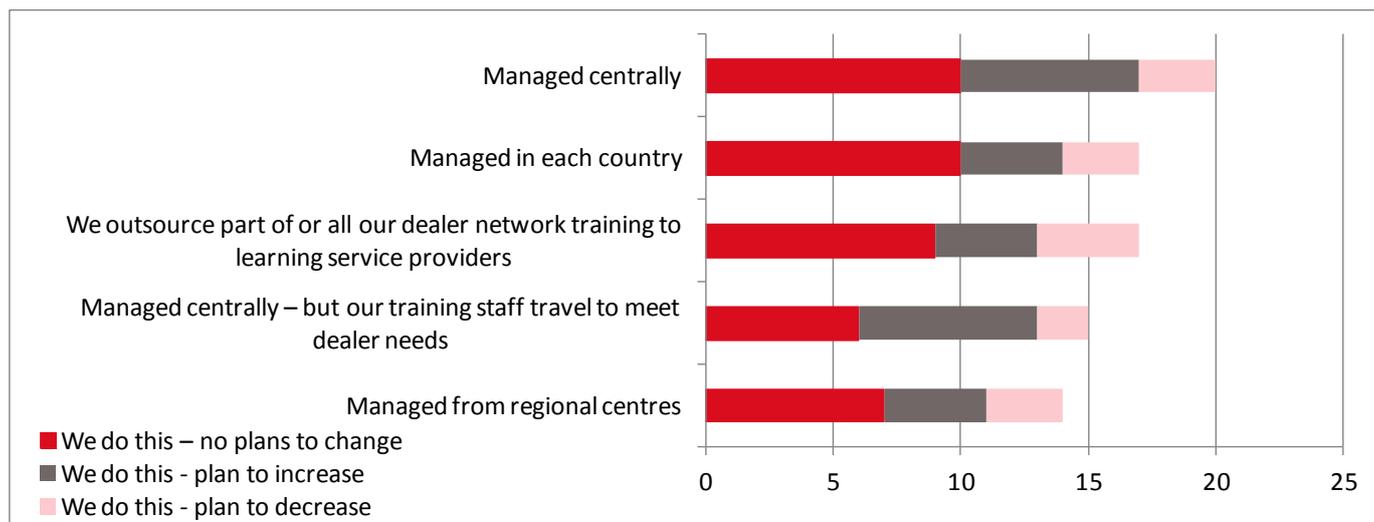
Question: How do you manage the learning services for your dealer network and how will this change? n=25

"We provide 20,000 participant days per year via an outsourced model, using Raytheon Professional Services for development, deployment and management."
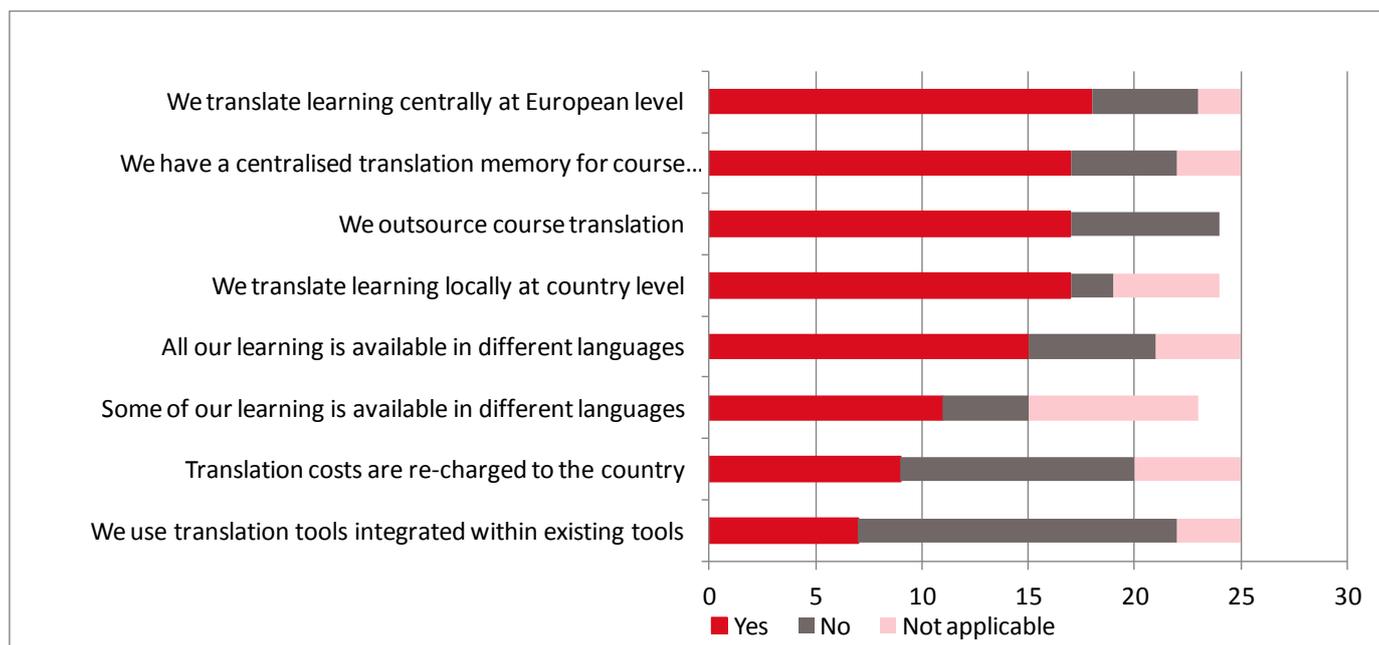
5.4   Course translation

For OEMs operating in a global market, it is important that e-learning content is available in the language of choice for their learners. Most manufacturers offer all or some of their courses in different languages, but use a variety of methods for translation from managing the whole process centrally, to outsourcing all course translation.

Volvo developing new manufacturing facilities

As part of an expansion, a new line of vehicles is being developed in China and the Volvo Academy must include the China operations and developing L&D functions there. Volvo Cars use English as the corporate language which minimises the requirement for translation.

Academy Manager, Volvo Cars

Figure 13 Models for translation of learning resources

Chart categories (top to bottom):
- We translate learning centrally at European level
- We have a centralised translation memory for course…
- We outsource course translation
- We translate learning locally at country level
- All our learning is available in different languages
- Some of our learning is available in different languages
- Translation costs are re-charged to the country
- We use translation tools integrated within existing tools

Legend: ■ Yes ■ No ■ Not applicable

Question: We are interested in the availability of learning content in foreign languages n=25

Centralised Course Development with Renault

Renault develops e-learning modules centrally and makes them available to their country training managers to use with their staff and dealer networks. Head Office controls the training agenda and provides the tools and content to each country. In-house, training teams make frequent use of Skype-type communications to make rapid contact and get quick answers, For more formal training, the central Academy uses virtual classrooms to 'train the trainer' and ensure different nations are united with the same training offer.

Nationally, training managers have little scope to adapt modules for their local audience other than to sort out translation errors. With a different range of products on offer, this can present the training manager with real challenges.
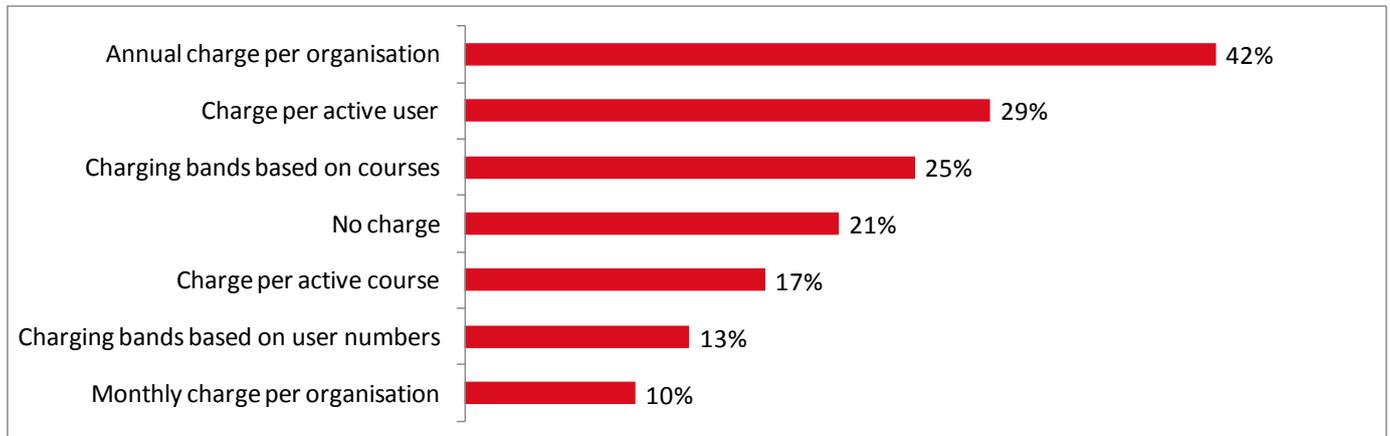
Renault Switzerland

5.5   Business models

Organisations operate a range of business models for their dealer network, with 79% having some sort of charging structure – based either on an annual/monthly licence, number of courses or number of users. 21% make no charge to their dealers.

"Each country must make technical training content available to independents at a fair and equitable price."

"We charge a yearly fee for work-based training: all other courses, we charge a participant day fee."

Figure 14 Charging structures for dealer network training

Annual charge per organisation	42%
Charge per active user	29%
Charging bands based on courses	25%
No charge	21%
Charge per active course	17%
Charging bands based on user numbers	13%
Monthly charge per organisation	10%

Question: How do you charge your dealer network for use of your learning platforms? (Please tick all that apply.) n=24

62% do not allow external users from outside their dealer network to access their learning. Of the ten respondents who do allow external users:

* Three organisations make an annual charge
* Three charge based on the number of courses
* Two charge on the number of active users
* Two do not charge at all

5.6   Setting Key Performance Indicators

Performance Indicators relating to training efficiency are still more likely to be recorded than those related to the business or strategic goals of the organisation. Indeed, 70% strongly agree that senior managers *expect* reports on course completions. However, only **2 out of 5** consider that they have clear KPIs for measuring the success of their e-learning activities.

Only **2 out of 25** organisations have amended their criteria/Key Performance Indicators for measuring the success of their e-learning activities as a result of introducing new technologies such as mobile or social media.

KPIs listed by respondents include:

* Pre and Post e-learning
* Increase in personnel motivation; line manager satisfaction; and their application of learning in the workflow
* Delegate completions; Delegate satisfaction; Course errors and issues
* CSI; FRFT; Sales
* Completion in the curriculum courses and the certification levels. Completion in the mandatory courses. Compliance with the related retail standards (training standards)
* Measurements in performance and results produced + job satisfaction rating
* Embedded in the WBT and VCT; learners need to complete a test and answer product specific questions.
* Incentive; Score; Motivation
* Only Certification level numbers
* Learner numbers; Course completion; Self assessment score
* Feedback forms; Group feedback

5.7   Depth of evaluation

27 organisations provided information about the level of programme evaluation they record in learning and development.

Level 0 – Training metrics

In 2011 we reported that **all** the OEMs were recording learner numbers, course registrations and course completions and this is still the case in 2013.

Level 1: Reaction

- 64% record learner satisfaction (up from 50% in 2011)

Level 2: Evidence of learning

- 72% record course assessment
- 48% record qualification outcomes centrally (down from 100% in 2011)
- 47% routinely collect information on the extent to which learning points have been understood (compared with 25% in the overall 2102/13 benchmark)

Level 3: Behaviour or skills transfer

- 52% record the overall reach/market penetration of their target learner population
- 27% collect information from learners on the extent to which they have applied what they have learned at work, (37% in the overall 2013/14 benchmark)
- 20% collect this information from line managers or supervisors (also 20% in 2011)

However, the *application* of learning in the workflow is a critical success factor for any training programme, and just 12% set KPIs for this.

Level 4: Impact or results

- 20% record line manager satisfaction (up from 13% in 2011)
- 17% measure specific business metrics when evaluating the effectiveness of learning technologies

Whilst this information may not be readily available due to the distributed nature of training locations, technology can assist in gathering and analysing such feedback to inform future training programmes.

> *"We can't control what happens after the course, or if the learner is becoming more competent so it is hard to measure impact."*

Our research has consistently shown that those in L&D who link learning to business objectives are delivering the most added value to the organisation. All of the areas investigated showed significant improvement in the last two years as illustrated in Figure 15 below. Indeed, 1 in 2 organisations now link training KPIs to customer satisfaction (up from 29% in 2011). However, there is still a way to go, not least as over one-third of organisations could only respond that measuring business KPIs was '*not relevant*' to L&D!

> *"Costs are kept under constant scrutiny and due to competitiveness, have to be kept down to maximise margins. ROI is required at every possible level."* Nissan Europe

Return on Investment for Kia

Traditionally training has always been done at a product level rather than as part of Dealer development. The sales consultant recognition programme is based upon three levels – New, Middle and Masterclass. After Masterclass they become sales managers.
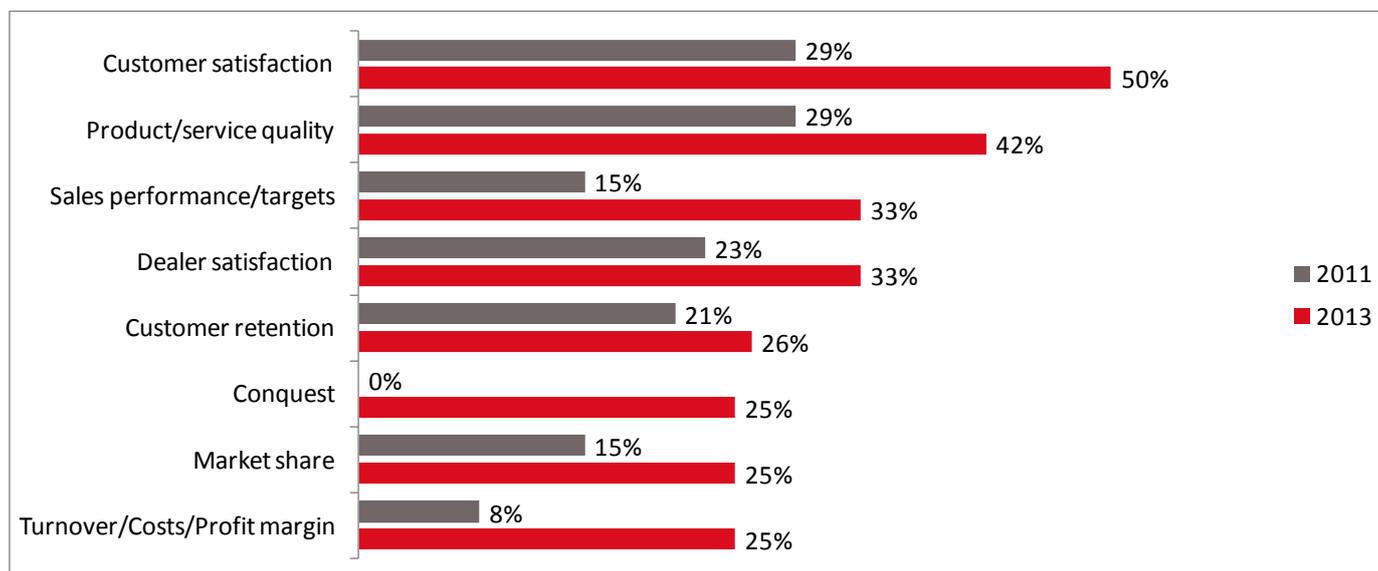
There is a need to train the field sales force and provide salesman competency skills modules. The proposed plans are to use online learning as well as management training courses to "train a master trainer".

There is a correlation between sales and customer satisfaction and an assumption/perception culturally that better product knowledge leads to more sales. With such a strong belief in the correlation between product knowledge and sales/customer satisfaction, it's difficult to use different metrics for ROI. Mystery shopping can help to test knowledge and sales funnel performance activity and compare with actual sales as performance indicators.

They are looking at all qualitiative elements to ensure high levels to deal with consumers. From an efficiency/cost perspective, this will be co-ordinated centrally and then locally translated and dispersed to the audience. However, as yet there is no central system to evaluate and collate data across the distributor markets.

Kia Europe

Figure 15 Linking KPIs to business

	2011	2013
Customer satisfaction	29%	50%
Product/service quality	29%	42%
Sales performance/targets	15%	33%
Dealer satisfaction	23%	33%
Customer retention	21%	26%
Conquest	0%	25%
Market share	15%	25%
Turnover/Costs/Profit margin	8%	25%

Respondents answering Yes to question: "Do you have clear criteria/Key Performance Indicators for measuring the success of your e-learning activities?" and "Are those KPIs correlated with any of the following business KPIs?" n=24

"L&D is not measuring impact – the business is! Our LMS system measures practical competency levels. Alignment with L&D involved comes from learning journeys – progression, competency, learning needs. The learning journeys are fixed and minimum but they are not measuring learning back into the business workplace."

6 Barriers to adoption

Two years ago, the barriers to progress were considerable.. Over 50% reported barriers due to ICT infrastructure, lack of learner access to computers, lack of support by line managers and lack of knowledge of the potential use and implementation of learning technologies. This year, we find the number reporting such barriers has fallen.

Top barriers to implementation reported this year are:

1. **77%** cost of set-up development and maintenance (32% in 2011)
2. **60%** not seen as a management priority (53%)
3. **47%** e-learning too generic and not tailored to our needs (9%)
4. **43%** lack of attractive, high-quality e-learning that supports our business goals (23%)
5. **40%** lack of skills amongst employees to manage own learning (41%)

> *"High cost for a delivery method that only addresses a part of the target population and can only work as a complement to formal methods."*

> *"Budget is the main constraint. Dealers embrace e-learning because it saves them costs (travel, out of work, training fees etc.)"*

The technical issues and learner access to computers are now less problematic than provision of cost-effective, quality content tailored to need. However, it is still proving difficult to provide central solutions across a wide area network where the dealers operate such different technology platforms locally – particularly when mobile or social technologies are part of the mix or rich interactive content or live online learning demands high bandwidth.

> *"The penetration of technology is not homogeneous in regions and countries."*

> *"Willingness of the dealer network to embrace new technologies and invest - iPads for instance. Bandwidth for rich content e-learning."*

> *"Different technologies are used in Sales and Service in the retailers - what path to follow?"*

LESS important barriers*

-   Suppliers overemphasise presentation and style (20%)
-   Lack of credibility of learning materials (23%)
-   Lack of instructional design skills amongst L&D staff (23%)
-   Learner ICT skills (27%)
-   Reluctance by senior managers to use online materials (27%)
-   Lack of knowledge about potential use and implementation (27%)

reported by fewer than 30%

Only one respondent particularly drew attention to learner reluctance as a barrier to implementation:

> *"The learning population is not prepared to deal with new technology."*

More e-mature organisations actually are more aware of the problems and report more barriers than the less mature ones as shown in Figure 16.

Figure 16 Barriers to implementation of learning technologies
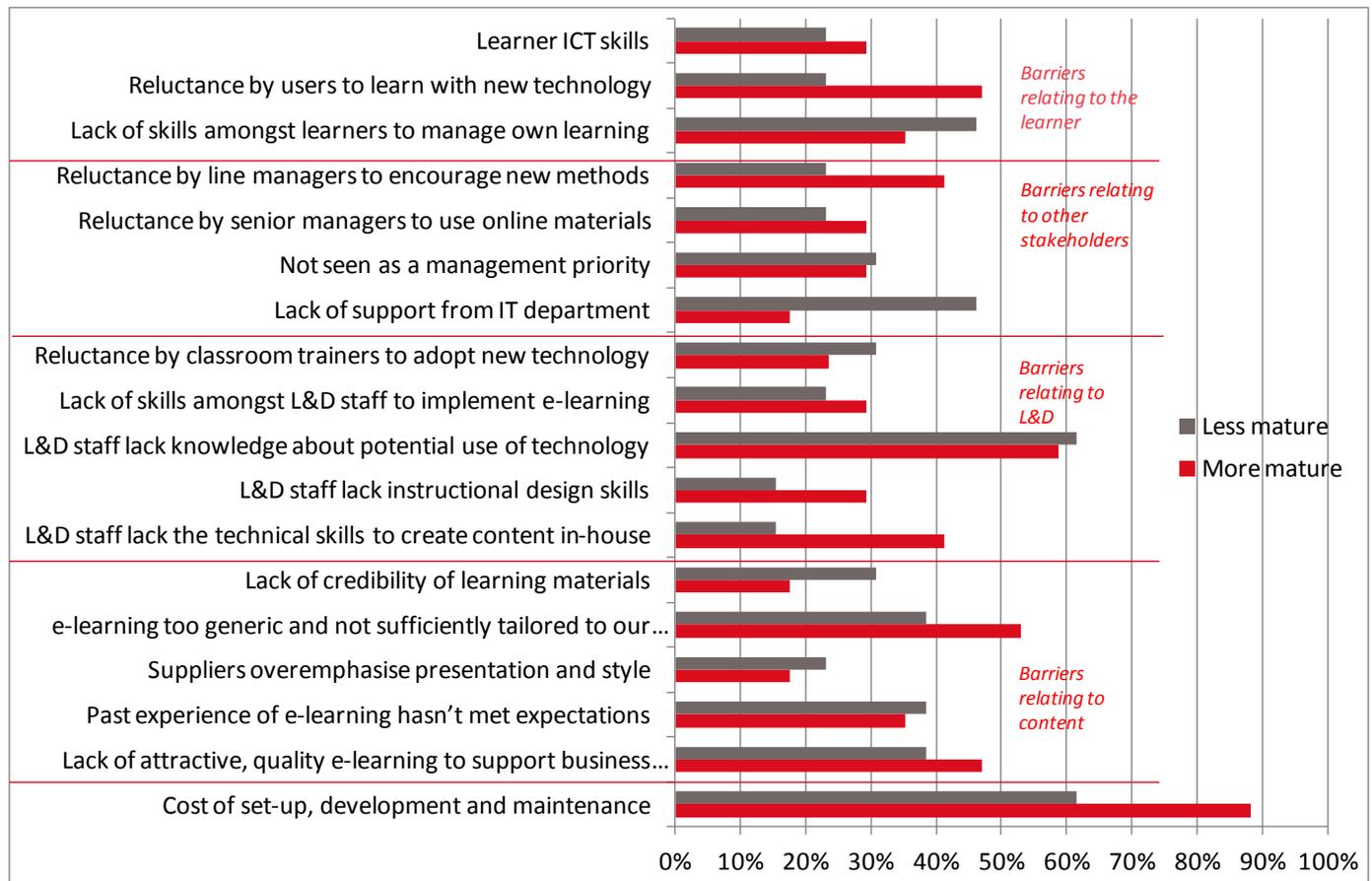
Question: Barriers relating to content, your organisation culture and staff engagement. Please consider the following list and select all the items that apply. n=30

Other barriers relating to content cited by respondents include

"Lack of design skills - both classroom, e-content and blended solutions tick box mentality to compliance/process training lack of structured support from leaders pre and post training poor assessment methodology."

"We are only permitted to use factory designed courses."

"Limited time and availability of subject matter experts in house to guide and direct external content developers."

*"Lack of first hand internal facts and substantiation underpinning learning course contents."*

7   Technology in the blend

The trend to decrease the amount of face-to-face training in favour of a more blended learning programme continues. 40% of all learning is still entirely face-to-face, down from 45% two years ago. 87% of respondents expect this figure to stay the same or reduce further in the next two years.

The proportion of entirely online learning has decreased from 2011 from 14% down to 10%, with 63% expecting this to stay the same or increase in the next two years.

- **40%** Face-to-face
- **29%** Blended
- **10%** Online only
- **60%** Say they plan to increase the amount of online only in the next two years
- **7%** Say they plan to increase the amount of face-to-face in the next two years

Figure 17 Expectations of change in future delivery methods within the next two years
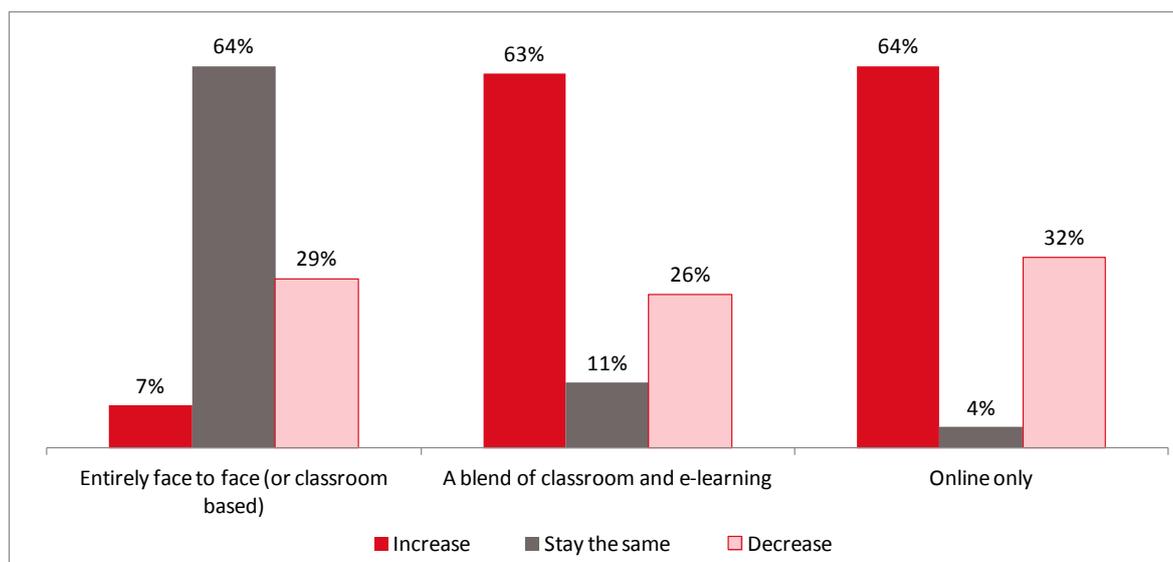
n=30

7.1   Technologies to support content delivery

The top types of e-content in use in the automotive sector have changed little over the last two years. E-learning courses remain the most popular, in use in 94% of organisations – the same level of use as reported in 2011. However, in this study we investigated this in further detail to distinguish whether courses are developed internally or bought-in from external suppliers.

"We have the ability to create our own e-learning content but not sure if in-house or outsourced is the answer right now. We want to deliver more online learning, including the use of video."

Back to basics in Nissan

Nissan used to develop very large (files) training courses but the technical infrastructure prevented easy access and deployment. This was a typical example of e-learning done but not done well and so not delivering great results. Now they are making simpler courses and testing them in the physical environment in which they will be adopted and utilised. Back to basics!

The models have changed/adapted to deliver more through VCT (Virtual Classroom Training) to give access to learning more easily. It also enables pre- and post-training for support and is a quick tool to facilitate communication.

Nissan Europe

Tracking use of these technologies over the years, we find that planned increases are always over-estimated, but learning portals, blogs, wikis and podcasts are far less widely used in this sector than in the private sector as a whole and may present opportunities for new approaches if new content media are being considered.

The top 5 types of e-learning content are:

- **68%** e-learning objects – custom made externally (61% in 2013/14 benchmark study)
- **63%** e-learning objects – 'off-the-shelf' (69%)
- **61%** Video content – best practice within our organisation (48%)
- **58%** e-learning objects– custom-made in house (74%)
- **53%** Job aids (infographics, checklists etc) (66%)

Figure 18 Technologies for e-learning content
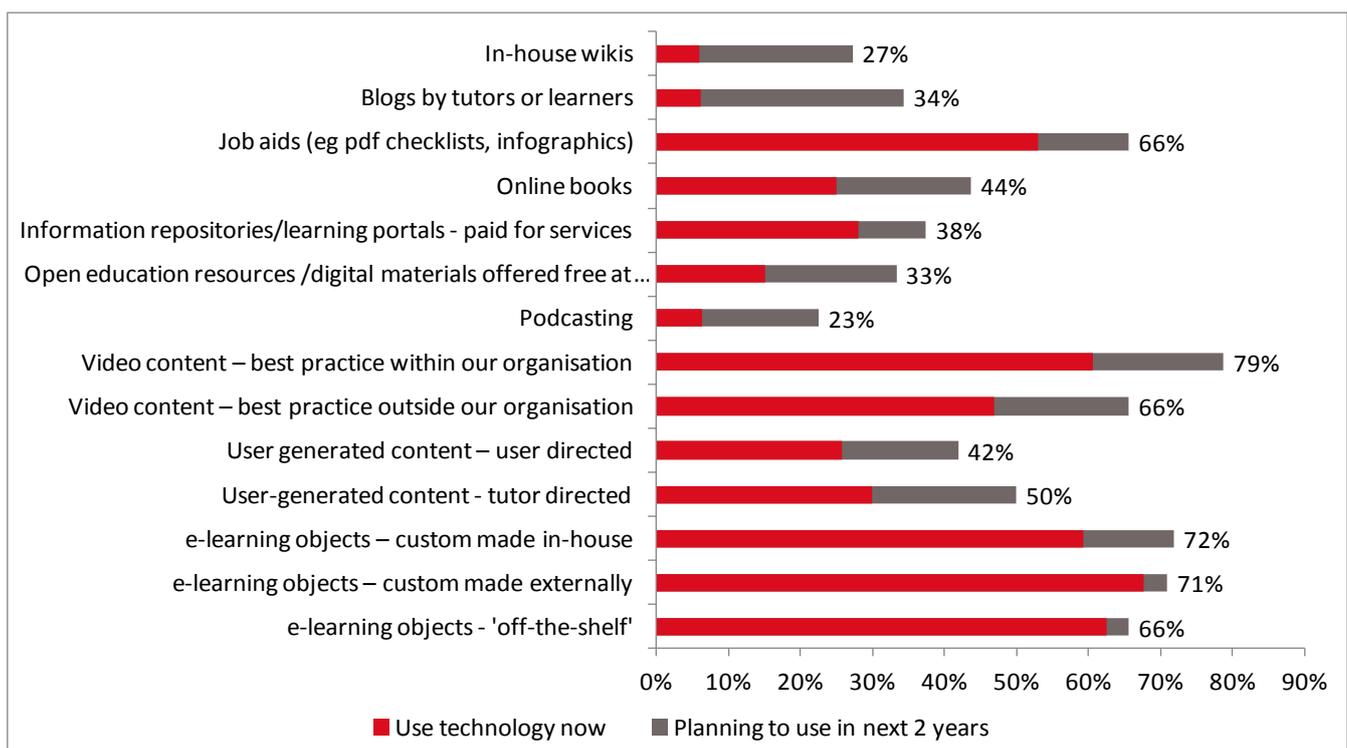
Question: Which of the following learning technologies or services are you using or planning to use to support content delivery? n=35

Blended Learning at Renault

Learners begin with the e-learning module and are then brought together face-to-face for discussion and to ensure that they get the right explanations and can tailor the training to focus on any local requirements. Technical training uses lot of audio, with animation behind the scene to show the practical techniques. Audio is very expensive - images and text are much cheaper.

Challenges set during and after the training help ensure that the content is more interesting for the learner. Assessment is still based on practical test and theoretical paper-based Q&A, although Renault is planning to roll out iPads for some aspects of assessment.

Learners understand better and faster as a result of using the e-learning modules, and training courses that used to take 3 to 4 days have been reduced in length to 2 days.

Renault Switzerland

7.2   Supporting collaborative learning

The automotive sector is just getting off the ground with implementation of social and collaborative tools. Voice over IP conferencing, virtual meetings and webinars have provided an easily accessible way to connect learners in different locations with trainers or with their peers. Virtual classrooms have really taken off, and are in use in 55% of organisations – up from 37% two years ago – with a further 29% planning to introduce them in the next two years.

Use of external or in-house social networking sites is still limited to fewer than 1 in 3 organisations, but over half are using or planning to use communities of practice or learning communities.

> *"Nissan are currently looking to conduct a project with a view to rolling out social media in April 2014 – We already know employees have informal networks going on and want to exploit and capture that for additional business benefits." Nissan Europe*


Paperless training

We have seen great change over the past six years. There has been increased investment in e-learning, VCT and web-based training. Certification training is still done face to face by an e-learning trainer.

We are planning to move towards paperless deployment – using iPads/tablets to replace handouts and changing their Learning Management System so that it looks more like an Apple interface.

The communications strategy is continually evolving to invite people to participate and use the learning materials, for example, building a "Trip Advisor" type forum as a means of assessing and selling L&D offerings.

Technology enables multi-channel development which will add more value at all levels – Retail, Wholesale and end Customer.

Figure 19 Social and collaborative learning technologies
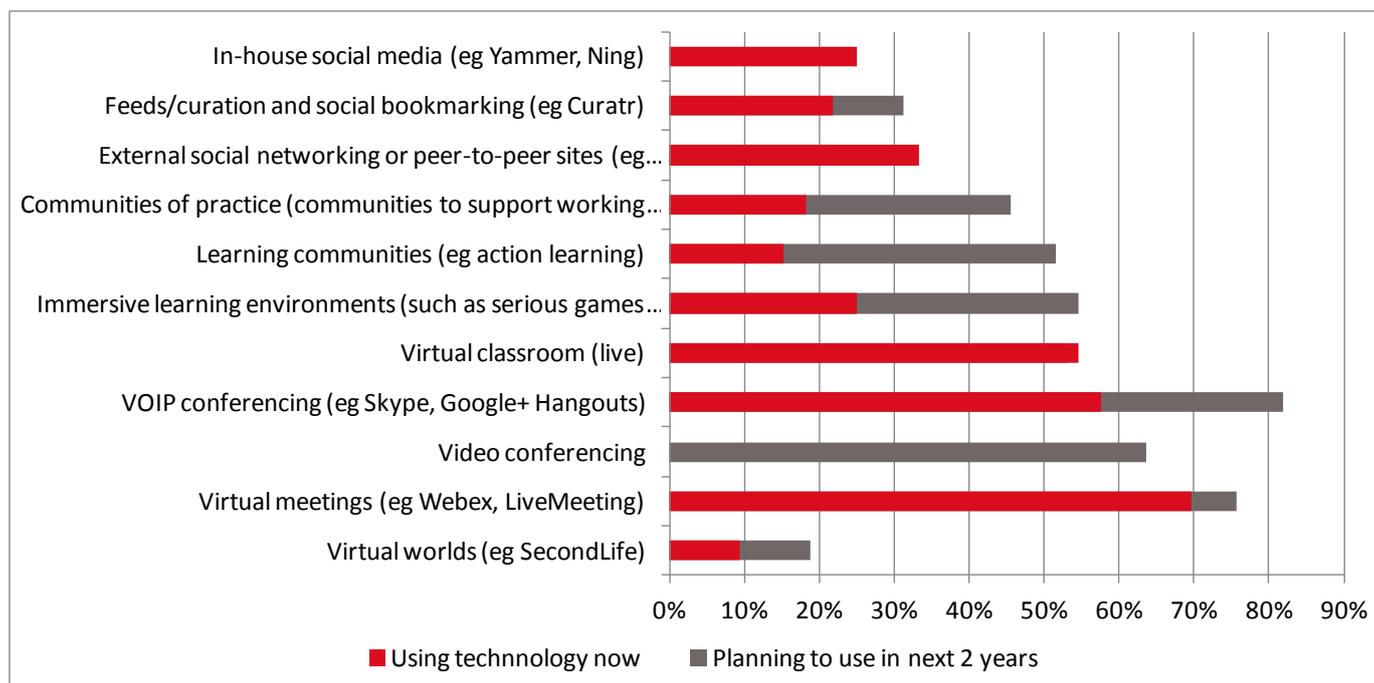
Question: Which of the following learning technologies are you using or planning to use to support collaboration? n=33

Volvo - going from 'push' to 'pull'

We are experimenting with in-house social learning and enterprise-wide information services and solutions.
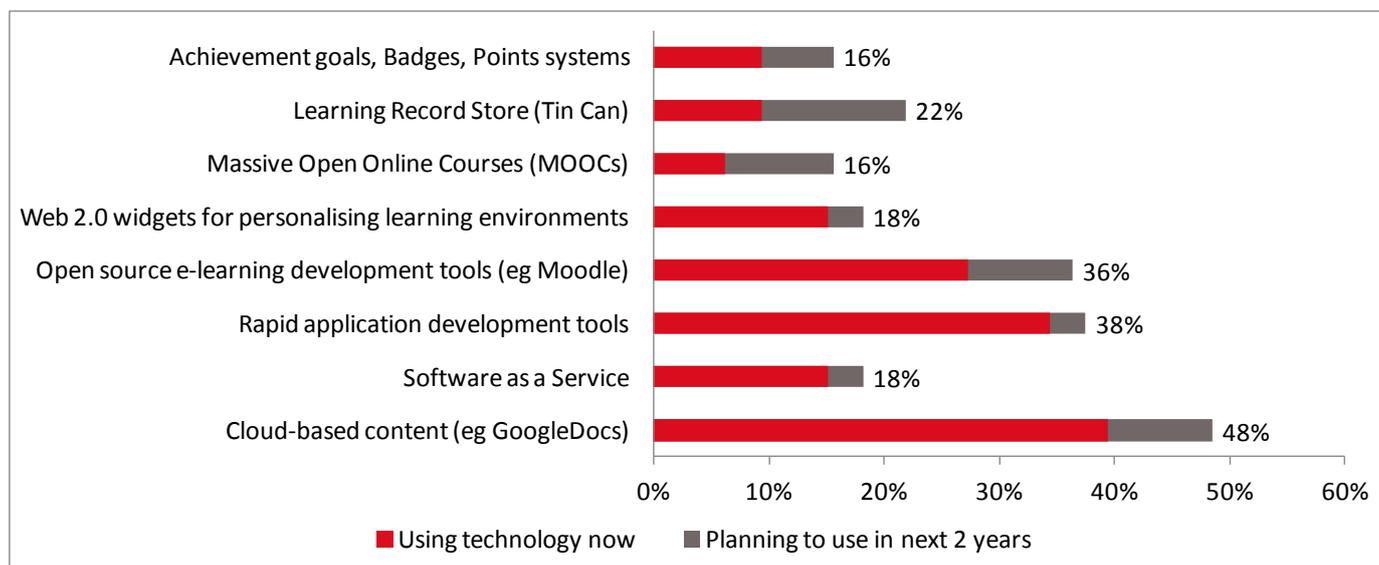
We are rolling out e-learning on iPads in Marketing and Manufacturing as an experiment. We still need to test this out and build the case to present to management and get general directions to upgrade all IT and smart devices. BYOD is another option we are exploring, utilising the existing technologies in use by our employees.

Agility is a key focus – 'simple, nimble, fast and smart'.

7.3   Technology environments and development tools

Whilst Sharepoint or similar enterprise-wide information services are in widespread use, there is much unexplored potential for some of the more recent development tools and environments. Use of rapid application development tools (such as Captivate and Lectora) appears to have fallen from 53% in 2011 to just 34% currently, although 59% are developing e-learning content in-house – perhaps associated with the rise in video usage. Software as a Service, Massive Open Online Courses, achievement goals, points systems (such as Mozilla OpenBadges) and Tin Can/Experience API are options that are starting to be explored by some.

Figure 20 Technology environments and development tools

Achievement goals, Badges, Points systems — 16%
Learning Record Store (Tin Can) — 22%
Massive Open Online Courses (MOOCs) — 16%
Web 2.0 widgets for personalising learning environments — 18%
Open source e-learning development tools (eg Moodle) — 36%
Rapid application development tools — 38%
Software as a Service — 18%
Cloud-based content (eg GoogleDocs) — 48%

■ Using technology now ■ Planning to use in next 2 years

Question: Which of the following technology environments or development tools are you using or planning to use? n=33

7.4 Learning Management Systems

Learning Management Systems have moved on from being stand-alone systems to store and deliver learning content. Of those 94% with an LMS, these systems offer great potential for different use:

- **94%** to store and deliver content
- **58%** to support a virtual classroom environment
- **42%** to deliver a more personalised learning experience
- **26%** to integrate with external video libraries
- **13%** use learning analytics/big data

1 in 3 links to competency/talent systems
1 in 6 is cloud-based
1 in 10 support social learning/collaboration
1 in 8 is integrated with HR systems

"From the demand has come the need to provide solutions in bite size nuggets, (e-learning, PDFs, video and podcasts) and use internet-based LMS for just-in-time deployment."

Although the LMS is currently at the heart of learning administration, the biggest leap in technology use will be in the use of e-portfolios, evaluation systems, diagnostic tools and competency management systems, jumping from usage in 1 in 4 organisations now to over 3 out of 4 in just two years' time.

Table 3 Learning administration

	Using now	Will be using in 2 years
e-portfolios	25%	81%
Online evaluation of business impact	25%	81%
Diagnostic tools	25%	75%
Competency management systems	25%	66%
Online assessment tools	25%	38%
Surveys and questionnaires	32%	55%

"Certification of technicians is highly valued in Toyota. By providing more modular e-learning content and introducing competency based assessments, we are able to continue to run both content and certification tracking in our LMS system, and reduce the learning time for our technicians." Toyota Motor Europe

7.5   Mobile learning

In 2011 we reported that just 11% were using mobile learning, but 50% were planning to introduce it by 2013. This year, the proportion has actually increased to 75%.

- **14%** AGREE they provide learners with mobile devices for learning
- **27%** encourage individuals to use their own mobile devices
- **40%** have a clear policy around Bring Your Own Device

"Developing mobile learning content is seen as expensive and using learners' own devices fraught with too many technology problems. Nationally, training budgets don't stretch this far and such innovation would be led by Head Office who would supply the hardware and the content.

In next 12 months we are:

- Developing a system to use in product training, using iPads for some test questions
- Planning to provide iPads for learners"

Renault Switzerland

Some are still concerned about security or how to offer the same level of quality and service when learning needs to be enabled on multiple learner devices. The top 5 barriers to mobile or social learning are:

1. **48%** IT security issues
2. **40%** wide variation in learners' personal technologies
3. **38%** unreliable ICT infrastructure/restricted bandwidth
4. **33%** perception that it is complex to support
5. **30%** general fear of losing control of the corporate infrastructure

Other barriers reported include:

"IT security issues; loss of control on company information in the cloud. Inadequacy for any kind of compliance training. Risk of "bad practices" spreading around through the social media."

"Compatibility with current LMS and reporting. Ability to offer a solution that has the same 'mandatory' requirements via mobile devices."

"We have a strong e learning strategy for WBT; VCT, recorded VCT and Video courses, but we lack a social, mobile strategy due to budget and staff."

"Ability to integrate into existing LMS and other available infrastructures."

"Limitations of the mobile portal with regard to content localisation and translation. LCMS functionalities deficit"

"We have a complete outsourcing solution which works. Due to budgetary reasons we are unable to develop our mobile learning strategy with social media and apps. Since the demand for these innovations is currently not in place, the out sourced team has limited experience with this innovative approach."
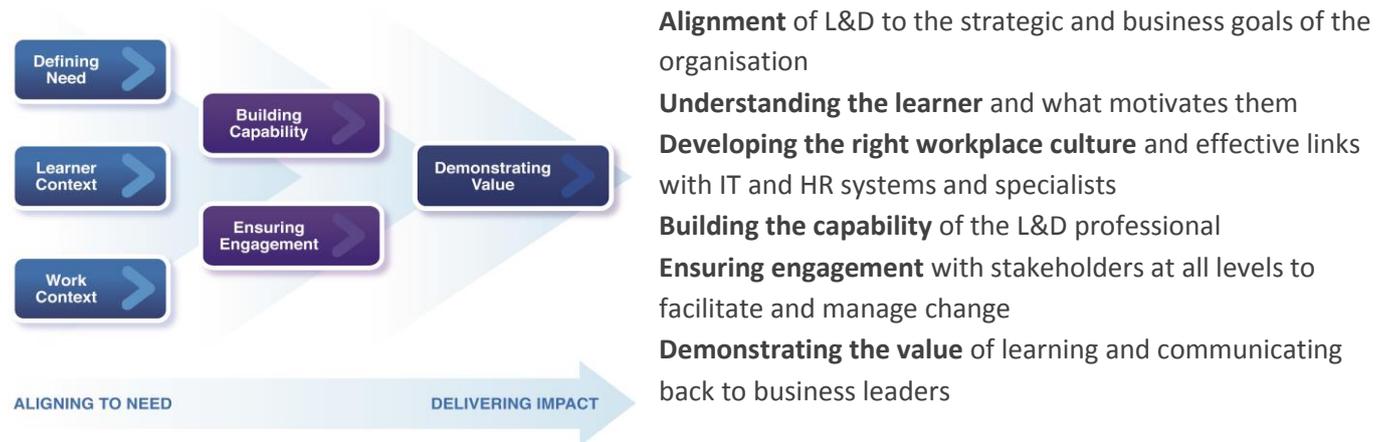
Differences emerge between the less mature and the more mature organisations as shown in the table below.

Table 4 Technologies used by mature organisations

| More mature organisations are at least 50% more likely to be using:	Less mature organisations are at least 50% more likely to be using:
Immersive learning environments (such as serious games and simulations)	Blogs by tutors or learners
Web 2.0 widgets for personalising learning environments	Achievement goals, Badges, Points systems (eg Mozilla OpenBadges)
Tools to organise and download mobile apps	Feeds/curation and social bookmarking (eg Curatr)
Mobile app development tools (eg GoMo, LineStream)	Massive Open Online Courses (MOOCs)
Skills diagnostic tools (including simulations)	Online books

8 Effective implementation

Towards Maturity has distilled advice on good practice from experienced practitioners and advisers into a 6-strand model that can provide pointers for improvement for everyone in L&D to accelerate performance. The Towards Maturity Model (see Appendix for details) includes the following strands:

Alignment of L&D to the strategic and business goals of the organisation

Understanding the learner and what motivates them

Developing the right workplace culture and effective links with IT and HR systems and specialists

Building the capability of the L&D professional

Ensuring engagement with stakeholders at all levels to facilitate and manage change

Demonstrating the value of learning and communicating back to business leaders

Each of these strands is broken down into a number of action areas that can help to highlight strengths and weaknesses. Compared with others in our Benchmark study, the automotive sector is above average in terms of Learner Context, Building Capability and Demonstrating Value.

Figure 21 Benchmarking the Automotive sector
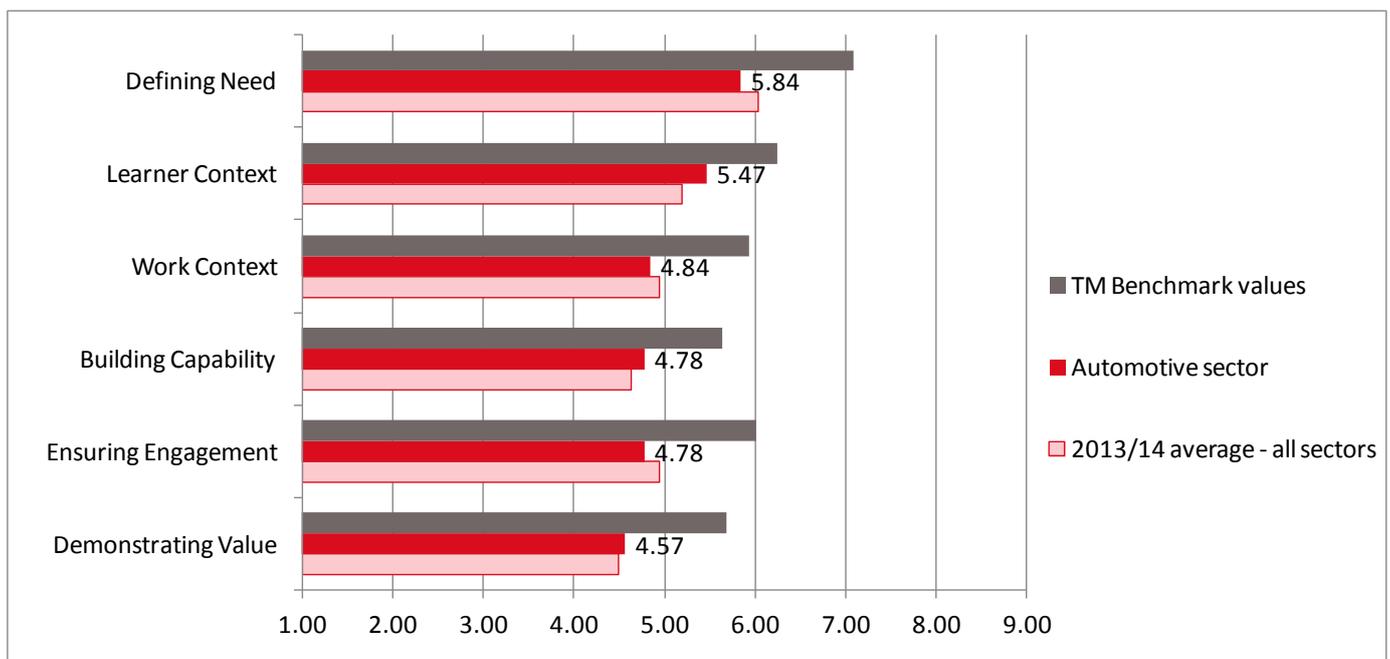
n (automotive sector) = 32

Particular areas of strength where the sector scores highly[4] and is greater than average by one-fifth or more include:

- **77%** use online assessment to help prove compliance (vs. 55% all)
- **50%** support learners in gaining business related qualifications (31%)
- **54%** individuals use learning technologies as a means of proving competency for their job (33%)
- **70%** provide learning with an identity/brand (56%)
- **77%** use online assessment to help prove compliance (55%)
- **71%** use animation, images and video appropriately as well as text (55%)

However, there is still considerable room for improvement where the sector score 20% or lower and fall more than one-fifth below average. Only:

- **17%** learners have the confidence to manage their own development (23%)
- **17%** provide continuing professional development (CPD) opportunities for L&D staff (45%)
- **16%** allow access to a broad range of non-job-related learning (25%)
- **18%** staff have access to job aids on mobile devices or online (26%)
- **10%** are aware of how our learners are using social media (outside of L&D) to share ideas (19%)
- **17%** involve users in course design (27%)
- **17%** top managers are involved in promoting e-learning (35%)

Automotive manufacturers use a variety of methods to encourage dealer principals and line managers to allow and support online learning:

> *"We send regular reports, advert flyers and bulletins to launch modules or remind dealers that they're available. Regionally this can encourage Regional Managers to speak to individual dealers about their uptake."*

> *"Methods vary widely country to country, but including in financial incentives usually helps."*

Good communication is just one element that makes for effective implementation. The mature organisations also know how to align their training to business goals. They know how to engage all stakeholders and they know how to deliver the right content for the right people.

Renault Train-the-trainer Programme

The Renault Academy creates virtual classrooms to unite different nations on the same training. Offer 'Train the trainer' content to help the national training teams. For one or two hours, with videos, explain what is changing on the retail front or new technical information etc. Questions can be prepared beforehand. Have you had this problem? What are the answers?

In-house, the team use "Communicator" (like Skype) – to make rapid contact with Renault France and get quick answers.

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[4] 50% or over strongly agree with the statement

Renault Switzerland

Mature organisations are more likely to think about business problem before recommending a solution, and ensure business process and outcomes are closely aligned.

Table 5 Main differences emerging between the more and less e-mature organisations

	Less mature	More mature
Our organisation assigns board level accountability for organisational learning	15%	40%
Our people understand how their work is linked to the organisation's performance	31%	53%
We support career aspirations (or personal job goals) with technology enabled learning	8%	32%
Managers encourage and make time for their staff to study on the job	11%	23%
Our organisation has a clear policy around Bring Your Own Device	25%	50%
We use available support systems to promote self-reliance, not a culture of dependency	9%	21%
We train classroom trainers to use technology to extend learning beyond the classroom	18%	42%
We help people locate in-house experts when they need them	9%	39%
We measure specific business metrics when evaluating the effectiveness of learning technologies	9%	22%

Differences of more than 60%

9 Future plans

With most organisations seeking both to add and demonstrate greater value to the business, and planning to increase the proportion of technology-enabled learning there are pressures to achieve more with less. This means working smarter, targeting training where it can deliver most value, and ensuring no-one is being held back for lack of access to the appropriate resources.

Managing Growth

One manufacturer is delivering training on a just-in-time basis in 12 languages across 40 countries.

The growth in the market is driving L&D activity and L&D has been able to expand and deliver the solutions required, when needed, using mobile technology. Using the internet, questions and answers are instant and just-in-time. With 18,000 viewings per month, these are cheap to create and can be available in 24 hours. The LMS content is all internet-based and login can be anywhere.

A decision was taken to focus on new technologies to meet demand – everything is run and managed through their own secure enterprise LMC system (with embedded agents) and delivered on mobile devices (ipads) and no paper. Augmented reality and gaming are used for just-in-time training –at the point of need.

Breaking learning down into nugget for mobile delivery has increased accesses ten-fold compared to full e-learning courses. Video or PDF are used to address specific issues.

Going forward there will be more input from core key markets but the UK will not remain at #1. Other major markets – China, US, Russia, Brazil, India will input into design, creation and learning. In smaller markets – learning will be created and adapted from these larger markets. As a result there will be more managers, more people and learning specialists in specific areas and these will move in-house.

We anticipate...

"...a slow move towards implementing more technology to create time and cost efficiencies. We will no doubt be slowed by a very cautious approach with security in mind as well as initial cost."

"...a big priority to increase, integrate and roll out organisation wide."

...exploring the possibilities of mobile learning and our Marketing specialists are looking at how to use social media for marketing and communications. At present nothing formal is being done." (Kia Motors)

Recommendations for driving innovation in dealership training

Keep the focus on the following:	Do more of this:
Provide learners with choice –in terms of the time, pace and location where they can learn – so that learning can be fitted into and around their work schedule.	Facilitate collaboration between groups of learners and between learners and tutors – encourage learners to share their experiences and knowledge online, perhaps building action learning sets or other learning communities.
As well as reporting course completions to line managers or supervisors, communicate individual successes to senior managers too.	Consider broadening the range of learning content you can offer to include non-job-related courses. Investigate the use of achievement goals that can help promote and encourage a learning culture in the organisation.
Giving learning initiatives a specific identity or brand can help in the communications with stakeholders at all levels.	Cost of quality content development is still a major barrier to progress. Are there MOOCs or other open education resources available that you can promote for some of the general skills training?
Integrate learning technologies within face-to-face training programmes. Consider the 'flipped classroom' model as a way of using face-to-face opportunities to build on knowledge gained through e-learning courses.	Help senior leaders to demonstrate their commitment to learning by getting them involved at the design stage and in new promotions – and in using learning technologies in their own development.
Learning Management Systems can offer so much more than course and learner administration. Investigate how they can integrate with other HR systems, or link to competency and talent management systems.	Skills diagnostic tools, including simulations, can help to tailor learning to individual need, allowing learners to focus on the areas where they need most help.
Video content can arise from many sources – not just best practice within the organisation. How are your learners sharing the external video sources they find?	Build learner confidence so that they can begin to manage their own development. Involve them at all stages – from initial design through to giving peer-to-peer feedback about the impact of learning

## Appendix: The Towards Maturity Model

In past studies we analysed the implementation activity of "e-mature" organisations and grouped 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)** that allows each participant in our research to objectively benchmark the maturity of their own e-enabled learning strategy.

Top learning companies – those in the top quartile of implementation behaviour – report improved take up, better efficiencies, more business agility and fewer barriers.

Figure 22 Benchmarking the Automotive sector using the Towards Maturity Model
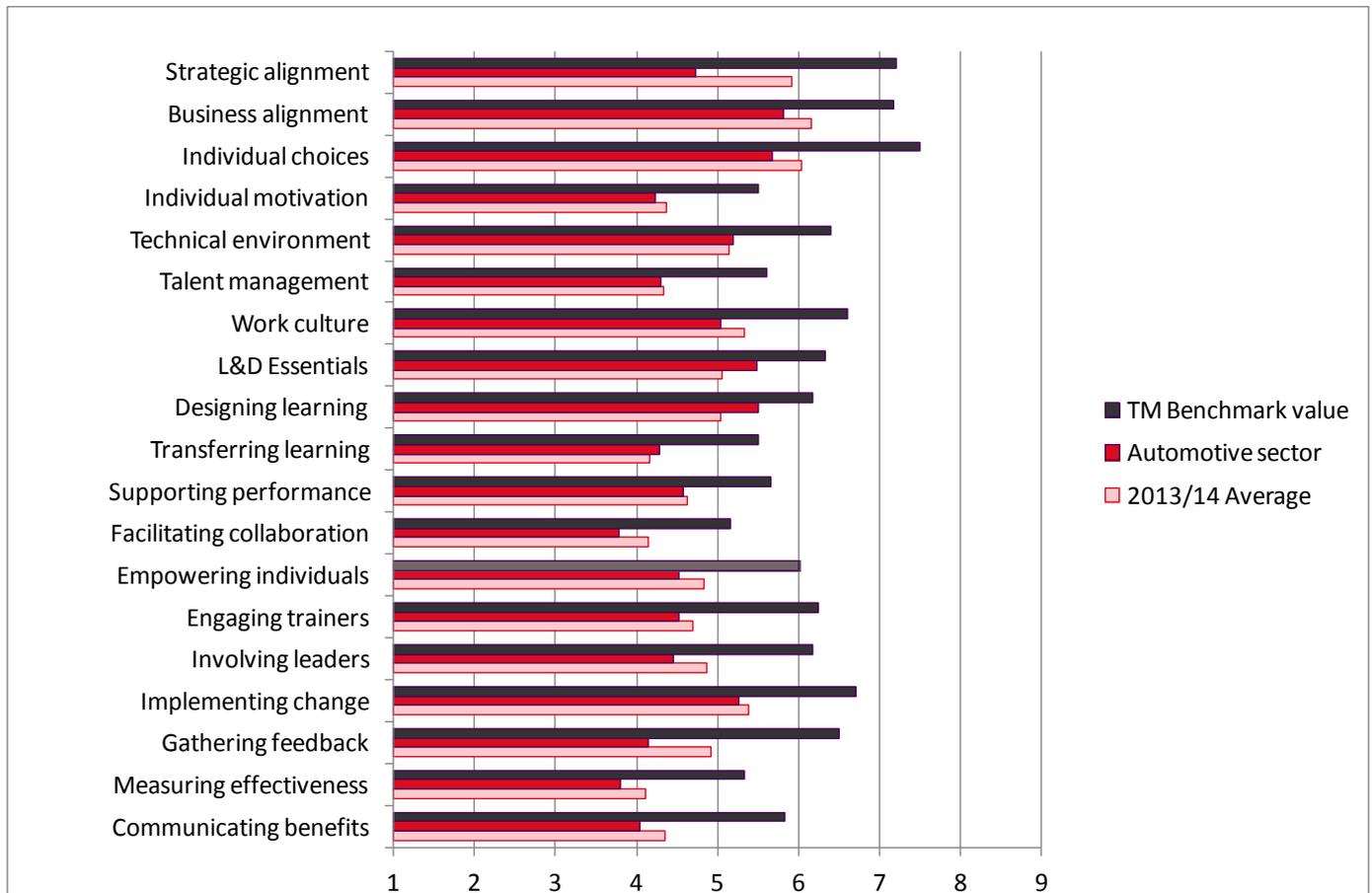
n for automotive sector = 32

About Raytheon Professional Services

*Piet-Jan van Gerwen, Business Development Director EMEA for Raytheon Professional Services: "For more than 90 years - in more than 100 countries and almost 25 languages, **Raytheon Professional Services (RPS)** has helped organisations transform the way they provide learning across their enterprise. A proven leader in the design, development, administration and delivery of performance-driven training solutions, we help automotive dealers increase sales, customer retention and profitability."*

From product launches to sales to technical services, our comprehensive, industry-leading automotive training expertise helps accelerate product knowledge to drive dealer performance and service excellence - as well as OEM retail network success.

Contact Raytheon Professional Services to learn more at www.rps.com.

Follow on Twitter: @RaytheonRPS

Blog: http://rpsblog.raytr.com/

Web: www.raytheon.co.uk/learning

About Towards Maturity

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

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

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.

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