



Adding Value at the inaugural ASAP conference

Cegos Group's presentation of Global Learning Trends and Implications for Asia

By: Jeremy Blain, Managing Director, Cegos Asia Pacific Region



Brief Summary

Cegos has been collaborating with STADA over the past year, and has a strong link to ASTD, having presented at the last three International Conference and Exhibitions in US. It was a natural fit to fully support the inaugural ASAP conference, and commit to be a main partner moving forward.

In order to add value at Conference, our approach was to gather insightful data that could be used as indicators locally, and could inform thinking as the Learning Professionals attending move into preparing their 2012 plans.

Cegos spends over \$3MUSD per year on research – all focused on Learners, Learning Professionals, Professional HR and Management Practices. You can find more of our work at www.cegos.com/press - The research informs our own learning solutions development, as much as offering our clients, and industry professionals a comprehensive view of the Learning and Development landscape. Interestingly there are very few examples of this happening outside of the US, so our Europe-wide approach, compared to trends across the Americas, and now filtering in data from Asia, makes it a more Global approach....in line with current movement and trends.

This survey presented at ASAP summarises the key findings from Cegos' annual learning and development research study among 2,500 European employees released at the *American Society for Training & Development's* Annual Conference in May 2011. In addition, it provides details of the key findings from a comparative survey carried out among a group of 130 learning professionals at ASTD's conference. This added another dimension to a robust report, enabling us to compare directly the perceptions of Learning Professionals, when compared to the survey outputs from the Learning population itself.

As well as putting today's training practices both sides of the Atlantic under the microscope, the report looks at how the attitudes and perceptions of the learning professionals surveyed compare and contrast with the opinions and preferences of today's learning community.

Both surveys reveal a number of common themes as well as challenges that the learning and development function must embrace in order to maximise the effectiveness of and presented during our ASAP session include:

The rise of emerging learning tools... but not at the expense of the human touch

Emerging learning tools are continuing to grow in popularity globally, but as a means of enhancing traditional classroom-based tools rather than replacing them, as the human touch remains more important in training than ever before. The increased focus on collaborative and informal learning tools mirrors the changing demographics and structure of the workplace which is categorised today by



a younger, more tech savvy, generation who collaborate in both their work and learning on an increasingly mobile and global level.

Blended learning and its role in creating the perfect mix

While classroom training prevails as the most used training technique in Europe and internationally today, there is a significant trend towards blended learning, which has seen a resurgence in popularity during the past 12 months. Today's learners are looking for the perfect mix in their training – a balance of face-to-face and emerging learning tools tailored to their individual needs. Reassuringly, learning professionals appear to be meeting these desires and needs with the last few years of tighter budgets appearing to have sparked an increasingly innovative and effective approach to learning.

The role of learning professionals and line managers in learning and development

Today's learners are taking increasing control over their learning with managers typically being the first port of call for information on training. A negative connotation of this is that some learners are bypassing the HR/training function. Learning professionals of US/international companies appear to be a greater source of information on learning for employees than their European counterparts.

In order to maximise the effectiveness of learning there needs to be a three way partnership between the learners, their managers and the HR/training function. Significant steps need to be made in this area as in both Europe and across the Atlantic, managers are the last people that employees turn to for their on the job training. Managers should be more involved in personal development and learning and development has a key role to play in ensuring that managers have the skills they need so that they are better equipped to coach and develop their staff.

Europe is lagging behind in providing leadership training and a lack of investment in management skills is also a concern

In both Europe and across the Atlantic, there still seems to be a lack of priority given to management training. At a time when management skills are more important than ever – especially as companies look to rebuild after the recession – this is a cause for concern. Investment in leadership skills appears to be a lower priority in Europe than in America and other key international markets. This could significantly impact competitive advantage and long-term business success.

A growing gap in attitudes and commitment towards training

Our survey of European learners shows that those who have experienced training are not surprisingly more committed to training than those who haven't received any training. A significantly much higher proportion of trained staff in Europe would be willing to take part in training in their own time and part fund it compared to untrained employees. In comparison, training professionals surveyed among US/international companies felt that only the minority of learners would be prepared to make a personal investment in training. Are trained learners in Europe more committed to training than employees across the Atlantic? Or are the learning professionals surveyed confident that their learners (predominantly from US/international companies) are already receiving the training they need in the workplace?

Clearly, learning and development has come a long way in recent years with HR and the training function adapting to the many challenges it has faced. Learning must continue to evolve to reflect the changing dynamics and pressures of the workplace and the changing needs of the learning community.



KEY RESEARCH FINDINGS

- Emerging learning and collaborative tools are increasing in popularity globally and are enhancing traditional methods rather than replacing them.
- Traditional training is not being driven into extinction – the human touch is more important to the learning population than ever.
- Learners want a complete mix of learning tools which complements their training preferences and how they work. HR and the training function are delivering with blended learning on the rise on both sides of the Atlantic.
- Today's Manager is playing an increasingly visible role in providing information about training but is not involved enough in the on the job training of employees.
- Management training is not receiving sufficient priority globally, with the lack of investment in leadership training being a greater concern in Europe.
- There is a growing gap in the attitudes towards training between the trained and the untrained.

Implications for Asia

So what can we say about Asia, and the latest learning trends? The first thing may be a greater proportion of Asian Multinationals – expanded into the West and – even more important perhaps – attracting talent from the West. China will likely spearhead this, and with a new global confidence, may be developing management skills, styles and growth in a different way to the ‘traditional methods’ we may appreciate now. These current modes, often being led by the US or West in general, are very much aligned to how the West currently does business whether home or abroad. Interestingly many of the trends discussed during ASAP 2011 play out when we observe rising trends from Asia, albeit at a slightly slower pace. The noticeable trend currently is the demand and rise of Blended learning, and an increase in investigation of eLearning solutions to drive greater productivity savings, leverage a wider audience, and avoid high costs of face to face training. This something noticeable in Korea, Singapore and some Chinese business here in Asia.

A focus on China

Perhaps early evidence for a shift in Asian learning trends is how Chinese business is adapting to a more multicultural environment in their organisations and within the local and global marketplaces. As recently as one year ago, many corporations carried out a wide range of L&D activities themselves, often rejecting third party training companies, consulting firms etc. A shift over the past 18 months, however, has seen a dramatic increase in the appointment of external consultancy and training firms – with experience globally and a footprint internationally. Rapid growth of the Cegos China business within our own network has evidenced this strongly for us over 2011. It is all about competing more effectively, and this is where Chinese Enterprise is now accelerating.

The point here is that China will accelerate these Learning approaches for the whole of Asia, and make more common the initiatives carried out in more Learner-Developed countries like Singapore, Korea, Japan and Australia.

Much of this activity in China is focused on the development of people, leaders and managers. A study by 21st Century Talent in China, across 53 corporations from 10 industries found that 49 out of 53 corporations have provided relevant training in different areas and to different levels within their



organisation over the past two years. That's 92.5% out of the survey set, significantly higher than the only survey previously done, in 1996, by Alexandria Surveys.

During April 2011, there was a major L&D summit held in Shanghai as a forum for Training and Development in China. Over 1000 visitors participated from corporate enterprise. A few key conclusions shared during the event reinforce my assertion that China is adapting, accelerating, developing its people and becoming even more globally competitive.

Key elements as shared by HRoot (www.hroot.com) were that:

Training has become the essential part of corporation development strategy:

Instead of this being Human Resources Management (HRM) driven, it is now more focused and aligned to Workplace Learning and Performance (WLP) – which effectively means that the approach to training in China is about deriving value above and beyond the talent management and talent development aspects.

A variety of e-Learning delivery / engagement methodologies and tools are being integrated into this increase in corporate training and development:

Culturally this has always been a tricky sell in China. The lack of human interface / interaction flies against the core values of working, sharing and contributing together. However, with new generations leading the way in the usage of social media and tools in China, the value of e-Learning is beginning to be understood - primarily as a driver of knowledge and gateway to skill building, involving and engaging more of the workforce and management than ever before.

There is a recognised need that training institutions also need to raise their game.

More and more corporations will outsource their training, thus promoting the development of the training market further. However, organisations within that marketplace, are either specialised in certain areas, or do not have the scope to expand quickly and scale up to meet the needs of Chinese Enterprise.

External trainers and consultants must demonstrate their value better

Price sensitivity is driving a Catch 22: Many corporations want the training as cheap as possible, as they see it still as they always have – a transactional activity. However, they still want to see the best results. In order to get the best results there is a need for better people, and better people generally come at a higher price.

Instructional design and well-oiled course development methods are key to the successful deployment of the training

There is a wide range of quality in the design / development space. The providers able to do this well will certainly develop competitive advantage quicker, and if it is backed up by excellence in delivery, then the 'end to end' approach in itself becomes far more client focused and consultative.

Protection of Intellectual Property

Finally, the perennial issue of Intellectual Property is moving to the top of the agenda, and it is only a matter of time before this is tightened up in China, giving confidence to external providers that their IP will be respected. As it stands now there are no guarantees, so reluctance from the providers to invest in product and solutions drives a further reluctance to engage in the elements we have already mentioned above. However, this is recognised, and for the first time clear and strong signals are being sent across Industry and within the Training and Development community in China that things need to move forward.



Perhaps this is the strongest indication yet that Asian business is competing at Talent level.

Cegos can announce that for next year, we will include survey data from Asia for the first time in our overall learning market research. This will allow us a truly global and local perspective, enabling even closer study of shifts in World L&D, and perhaps an indication of what to expect for the coming years in the economic powerhouse of Asia.

You can read or download the 2011 survey reports through Jeremy's Slideshare portal:

<http://www.slideshare.net/JeremyBlain>



JEREMY BLAIN
Managing Director
Cegos Asia Pacific Pte Ltd

Jeremy Blain is Managing Director of Cegos Asia Pacific Pte Ltd, the newly-established regional HQ of Cegos, which is Europe's largest training organisation that was founded in 1926. He is also a Partner in Cegos Group, which has activities that span 50 countries and had a turnover of 175 million Euros in 2010.

Jeremy's primary role will be to lead all of Cegos operations and activities across Asia Pacific, from the new regional head office in Singapore. Cegos has been operating in Shanghai, Beijing and Hong Kong for more than 12 years and these offices will now report in to Singapore. Cegos also has a significant number of MNCs as their training partner in this region.

In his new role, Jeremy will continue to build Cegos' existing business in China and in the major markets in Asia Pacific, focusing on MNCs and SMEs in terms of professional development and growth of their Managers and teams locally and internationally. He is also responsible for supporting clients through a network of Most Valued Partners (MVPs) in the region, driving a pan-Asian coverage and localised customer interactions.

Jeremy has a passion for working in the Asia Pacific region, having had many years of experience driving commercial and operational activities in countries including India, Singapore, Thailand, China, Japan, South Korea and Australia. In previous roles at Procter and Gamble, PepsiCo and as CEO of his own business, Jeremy's roles have included marketing, sales, and general management.

An L&D entrepreneur, Jeremy has been most recently responsible for expanding Cegos' global footprint, and prior to that as General Manager for the Cegos UK business. His extensive experience in leading and managing global cross border activity has been driven by assignments and operations in all parts of the world. This experience has given Jeremy a unique sensitivity to the needs of the increasingly globalised workplace, cross cultural implications, and the importance of Social Media & Networks to enable remote interactions, greater collaboration, and new learning and development opportunities.



Jeremy has written several white papers on the latest trends in the L&D industry, is a frequent media commentator and a regular speaker at many international L&D events spanning the globe.

Jeremy was educated in the UK at Repton School and graduated from Sheffield University.

Follow Jeremy through his active networks: <http://uk.linkedin.com/in/jeremyblain>
| <http://www.slideshare.net/JeremyBlain> | Twitter: @learntheplanet | www.cegos.com

About Cegos:

Cegos is Europe's largest training organisation and one of the world's leading L&D companies

- Activities in over 50 countries, with a turnover of 175M€ and a staff 1200
- Specialised in the development and growth of Managers and their teams
- Strong foundation trading more than 80 years, financially stable and privately owned
- Operations with significant number of Global MNCs as worldwide training Partner, and strong local presence with public sector organisations and SMEs.

Cegos Researches, Invests and Develops

- Cegos observatory have a 2M€ per year on industry research allowing us to share our findings with our customers and help define future learning strategies and tactics more efficiently.
- In parallel, it allows Cegos to invest in the most appropriate learning solutions
- Cegos has invested nearly 15M€ over the last 3 years in developing a suite of flexible, international blended and off the shelf elearning courses, in up to 13 languages.
- The new development of the blended and elearning suites, has been followed up year on year by a rigorous upgrading process to align to evolving Learning trends, client feedback and new tools, techniques and technologies.

Commitment to Asia Pacific region

- An investment into a new Headquarters for APAC in Singapore linking to the strong growth potential in the region.
- Existing Cegos customers with Regional HQ in Singapore, HK and Shanghai now mirrored by Cegos presence and expert contacts.
- A 12-year established and successful business in China and an operation in Hong Kong.
- Think Global, Learn Local – we know the importance of a localised approach,
- Ready to go language offer > English and Mandarin and some courses in Bahasa, Thai and Korean....so far.
- A Singapore hub now gives us region-wide capability, presence and proximity to our key customers.
- Network of expert trainers and consultants experienced within the industries of our clients, and practical experience and track record within their spheres of expertise.
- We can be the Global Partner for Asian MNCs operating in the rest of the world