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## Interview with Josh Bersin August 9, 2006

Transcription of Audio Segment

**Interviewer:  
Elliott Masie**






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**Elliott Masie:** Welcome! Today is August 9<sup>th</sup> and I'd like to welcome a colleague here to The MASIE Center. This is Josh Bersin and my name's Elliott Masie, and we're going to do something we've never done before. Elliott and Josh are going to talk about learning in an unplanned, unrehearsed opportunity for us both to learn from each other and to share with you some thoughts about how the world of learning is evolving. So, welcome to Saratoga, Josh.

**Josh Bersin:** Thank you very much, Elliott; it's great to be here.

**Elliott Masie:** Let me start off. What are the one or two things that you see in your work at Bersin & Associates with lots of different both implementers and suppliers as some of the breaking issues and challenging issues in the world of learning?

**Josh Bersin:** Well, there are a lot. I think one of the things that we see for medium-sized companies to smaller organizations is there's still a lot of early adoption of e-learning and all the technology associated with that, but not so much what to buy, but how to implement it and how to use it and how to organize the training function to take advantage of all this technology.

It's clear now that e-learning technology is important, but how do you integrate it into your ongoing business processes and really get leverage out of it? On the higher end, for larger organizations, what we are seeing is a lot of movement towards, as I talked to you a little bit earlier about, talent management and trying to figure out how the learning and development function can better integrate with talent management issues in the corporation that might be critical workforce shortages, merger and acquisitions that they need to move a lot of people from job to job, skills gaps, the aging/retiring workforce, the Millennium Generation entering; it's an exciting time for learning and development professionals because there are some really new problems to solve.

**Elliott Masie:** I would echo those trends. In fact, one of the interesting things I've seen is when a business unit in a large enterprise actually is a bit like that mid-size, small-size company. So, there are some organizations where, on an enterprise level, they've been doing a lot with e-learning, but it's the first time their sales group or their safety group has done that.

Just to maybe answer my own question, (we're going to do some back and forth interviewing here) I actually

see sort of three Cs that I talk about. One is Compliance: it seems to continue to be both an incentive and a nightmare around learning. It's a great way to get learning funded if you're doing compliance but at times it's squeezing out the ability to do performance-based training. The second piece is Competencies; everyone talks about them, but the reality is when you go around and see people who are actually doing competencies at a systemic level and in a way that's moving the business needle. I think the third is Content Management. I've almost seen the shift change from, "let's make sure we track each employee's learning," which is important, to "let's also make sure we've got our arms wrapped around all that content, both the formal and the informal.

**Josh Bersin:** Big problems, big challenges. In the comments (ph) area, it's been very interesting to me. In the last year, we've done a lot of research on performance management because that's been hitting the Learning and Development Organization heavily, and I was very skeptical about early research on whether competency management was really possible at a global level and really in a powerful way.

What I have seen is an emerging interest and very important demand for Competency-Based Learning because there is really, to me, there are two forms of training. There is performance-based training where you have a business problem like "we need to train people to improve the business," and then there is more of the talent-based training problem where we have global organizational issues and we need to move people from place to place and the Learning and Development Organization facilitates that.

In that latter area where a lot of the emphasis is going right now, you need a competency-based approach because, thanks to e-learning, we now have thousands of courses online, and people don't know which one to take, and managers don't necessarily know which one to assign, and so forth. So, I think the area of Competency-Based Learning is really big. It's becoming bigger and I think it's going to be an area of growth and opportunity.

**Elliott Masie:** And I think there is a little bit of a dynamic challenge where, on one level what e-learning has moved us towards, and we're looking at it in many business processes, is a shift towards self-service where we're saying, "Let the learner choose the things that she needs to do in order to stay in compliance, in order to perform." And on the other hand, we want to say, "We really want to be in control..."

**Josh Bersin:** Right.

**Elliott Masie:** ...of how our employees are spending their time,” and we want to align it. So, to me they are not a contradiction, but when the rubber hits the road, there is often this stress between self-service and democratization of content and a real hard-nosed focus on learning that aligns with competencies.

**Josh Bersin:** Right. Well, I would agree and what I think is happening in that area is, it's forcing learning and development professionals to think about the difference between e-learning and performance support. Because originally, back four or five years ago, if you could build a catalogue, the course is online, you were happy. The people were taking it and they could get content online.

Now that there's so much online, there are times when really it should only be a performance support tool and times when it really should be a training tool. So, there is a whole bunch of rethinking of the type of content and help people are developing, and I think that gets to your third “C”, which is the Content Management.

We've also seen that Content Management is a big issue and it's an unsolved one for most companies. One of the reasons that I think it's becoming such an issue is, ideally, corporations want to have some content for performance support, some content for compliance, some content for general competency-based training, some content for performance-based training, and how do you find it all? How do you manage all that? How do you develop it all? Lots of interesting challenges there.

**Elliott Masie:** One of the things that we're going to be about at Learning 2006 is a phrase I've been using called “Fingertip Knowledge”, which is that more and more people are bringing to work the behavior they have at home: they want to Google their way, or they want to Yahoo, or Microsoft Search their way, and what we found is that one of the structural challenges, which curiously you're seeing in the LMS space, is that lots of corporate Intranets don't penetrate at a search level, a master of the LCMS, so...

**Josh Bersin:** Right.

**Elliott Masie:** If I go to “Search” in my corporate search engine, for instance, [and type in] “Procurement”, there might be this awesome e-learning piece or even this awesome performance

support piece that doesn't come up in the search. Instead, I get a three-year old document there.

**Josh Bersin:** Right. Well, that's a very interesting topic and I think most companies are just starting to grapple with it. The LMS, over the last five years, has become a very well-known corporate system now, but it's really kind of an island for the training department. As companies are bringing more and more content into it, now the demand is for exactly what you mentioned. And I think from the LMS supplier standpoint, they are now being asked to deal with that problem.

Most LMS companies are not that big; they don't necessarily have the technology and the tools to scan everything in the enterprise. We were talking last night about Google and what role they could play. I think that's one of the unsolved problems, to be honest, in this industry and I think it will be solved over time, but there's no clear solution yet.

**Elliott Masie:** It's federated search or an API. When folks like us get together, we often, over a drink we do either gossip or the like about the industry, and while we obviously don't want to get to the pure gossip level, let's talk a little bit about the marketplace, because we both, in different ways, track that.

What do you see out there in the learning marketplace? Obviously, there are mergers and acquisitions and shifts and the like, but if we weren't on video, what might we be talking about the marketplace together?

**Josh Bersin:** Well, the current learning marketplace: it's a very healthy market, but it's sometimes hard to tell what's going on. Certainly I see it in sort of three elements: the technology part of the learning market, which is LMS, LCMS, Tools market is growing very significantly, but because as it grows, smaller companies tend to get left behind. There are mergers and acquisitions and there is a significant emphasis, I think, going on in the Learning Management Systems market to move into more of a talent management role. That's going to change that market.

In the area of Content in the learning industry, there are many, many fantastic content providers. To me, it's a naturally fragmented market because of the nature of the problem and all the different types of training that companies need to do. And so, I think for buyers, for implementers, you'll always have many, many content providers to talk to and to look at and

it's never going to be one and it's never going to be two. And the big e-learning providers have struggled with that because they've tried to dominate larger and larger segments and they can't because there are so many different applications.

The third area in the market, which has also been changing a lot is the services and the outsourcing part. I think I personally never felt that learning outsourcing was going to be as big as other people have said. It has grown but I think the challenges of training are still so company-specific, so culture-specific, so content-specific that most companies rely on consulting firms to help them solve very particular problems to them. And although there are many cases that you read about of companies outsourcing large percentages to other training departments, I see that particular part of the market as being relatively small. It tends to be focused on organizations that have some sort of financial pressure that's driving that, and so consulting business is still very, very healthy but I don't see it moving to massive outsourcing.

**Elliott Masie:** Here is my take on the market. I think it is healthy; I think there is some fear and loathing allowed in the marketplace because I think it's very difficult for some of the suppliers to envision five years out. Obviously, one route is acquisition and the like and so I know that a lot of folks are looking and taking second looks at their suppliers, not from a functionality point of view but also from a business model point of view and as survivability. The other piece that we're hearing a lot about is the desire of organizations, as the quantity of content goes up astronomically, to be able to buy more in a sense that when they were just doing 25 or 90 courses in the IT space where they could pay a lot per course.

**Josh Bersin:** Right.

**Elliott Masie:** Now when we want to have collections, it might have 2000 or 4000 courses. People want to create and to build, buy or lease content at a lower price and also have what we're calling "easy-to-personalize" or "easy-to-localize" content or they can do the last part.

The other piece that I am very intrigued with and we are starting to track is the rise of non-US-based learning and systems firms. Lots of action is coming from Australia, South Africa, Singapore, Hong Kong, the Middle-east, and so I am intrigued to see some of the evolutions.

**Josh Bersin:** Absolutely.

**Elliott Masie:** These will be funny kinds of days there.

**Josh Bersin:** Yes.

**Elliott Masie:** Josh, let me ask you two more questions as we look at this. One is, you do a lot of a research around what you call "what works" and is there one practice out there, one approach right now, that passionately you see as...if you were to give one piece of advice or...

**Josh Bersin:** I tell you, this is something that probably most companies will not see as a breakthrough, but we did a lot of research over the last two years on what are the dimensions or the issues that you can adopt? What are the practices you can adopt that improve effectiveness and efficiency? Should you buy an LMS; should you centralize? Should you outsource? All these possible things you can do.

The one thing that clearly comes up again and again is performance consulting. And the organizations that have a performance consulting role (sometimes it's called "Needs Analysis", sometimes it's called "Business Analysis") that works with the lines of business to identify problems, and not necessarily assume that the solution is always training, and then work on the implementation and the rollout and the measurement and the management of the programs have significantly better returns on investment, impact and efficiency than those that don't.

I was just reading the book written on performance consulting back in 1998. I was reading it right before I came out here and was thinking, "Gee, this is not in your topic," but it actually is. There are still a lot of companies that don't have that role defined. If there was one thing I can say it's "Figure out how to do performance consulting in your training organization."

**Elliott Masie:** What we are seeing as one of the practices that is growing enormously, and it's funny because it almost starts to get the interesting blend between is it training or is it corporate communications and the like, is the rise of really short media objects that are knowledge-filled.

In some sense, that's what we are doing here. We could have done an instructional design for this piece, but we wanted to do it quickly and inexpensively and

get it to you rapidly. Well, you are in that same situation that, in addition to all the skill building, eLearning and the fundamental courses on business process and technology, there seems to be a real thirst and a desire and a receptivity to experiment with using, whether it's podcasting, interviews, or other ways in which you get "the wisdom of the crowds."

I know at Learning 2006 we are going to look at what learning in a flatter world looks like and what I have been seeing more and more is the learner doesn't make the distinction. The learner doesn't say, "Oh! I took an eLearning module. Oh, I took a really good podcast," or "That was a really valuable PDF." They don't care; if it helps them do their job, if it helps them get a good performance review, if it keeps them out of trouble, then it's valuable. I think we have got to get flexible in our field to realize that our LMSs are going to have to handle things that don't look like traditional SCORM wrapped around structured content and the like.

**Josh Bersin:** And the big debate about whether this has sound instructional design or not is probably over. You just need to get it out there and there are some times when you need to do a lot of important and sound instructional design and there are some times like what we are just doing now. We just basically sat down here five minutes ago and had this video, and getting the information out in time is the essence.

**Elliott Masie:** One more question would be, it would be interesting for both of us to look at some myths or mythologies that are out there about learning. Maybe we can go back and forth. I'll let you do some rapid catch up here, but what are some of the myths that are out there? I'll give you one of the myths that I see.

It's got to be really slickly and Hollywood produced for it to be effective. We actually are seeing a shift to where people want it to be efficient; they want it to be accurate, they want it to be trustable, they want it to be current, and they want it to come to them in the format they want, which means that Josh and I could have probably done a six-hour video, but none of you would listen to that. But a 30-second video would have left us really frustrated in that process. So, how do we look at things without just saying, "The more money we spend on it, the better the content"? In reality, if you need information, you want it in a way that it comes to you easily, efficiently and effectively.

**Josh Bersin:** That's a good one. Here, I just thought of one; "You need an LMS to do eLearning." I hear

that over and over again; companies come to us and they say, "Well, we are starting an eLearning strategy. We are not doing enough eLearning; therefore, we are going to go through the process of buying an LMS."

The two are not necessarily related. You can do eLearning without an LMS; you can use your LMS very powerfully for an eLearning solution. I think we are at the point now in the LMS evolution where most medium to large organizations should have some form of an LMS, but really think about it as an administration system, a reporting system, a management system, and not as an eLearning tool, because I think people confuse that a lot early on.

**Elliott Masie:** I will give one, and this maybe very provocative, but learning is a career, or training is a career. It's an interesting one; there certainly are people and many of you that are watching this that have made learning, training, development, performance, your career. I applaud you and that's wonderful. The reality is, almost 50-60% of the people that we talk to in our field, it's part of their career. It's part of a business career; it's part of an operations career. It's a stop on a larger career. And I actually get real excited about that.

I have been in conversations with an MBA program to see if they could build an MBA that has learning and performance as a component of that. And I think sometimes we get too locked down into thinking, "it's got to be a career."

I will tell you some of the most provocative changes that I have seen in organizations are when a learning leader comes in who has no background in learning. Somebody came into one of the General Electric companies who came out of Operations and he has some totally rock 'n roll questions his first day on the job because he had none of our mythology.

So, I am not telling you that your career is over, but don't think that your career has to be constrained by the world of learning. And I think we are now starting to see some CEOs who have had a longer wait time in learning performance, development. It's such a fundamental business skill. Got another myth that you want to say?

**Josh Bersin:** Okay, here's one: you have to measure level 3 or level 4 in order to have a really sound learning organization. I am finishing a big report on this. There seems to be, as much as I love the

Kirkpatrick model, there seems to be this belief that if you are not moving up the chain from satisfaction to learning to business impact, that you are not doing a good job. And what we have seen over and over again is that you don't have to try to measure business impact of all of your training programs.

The most valuable insights and measurements you are going to get are the anecdotal feedback that you'll get from your executives and my managers without going through huge measurement projects. I've just finished some research last month. Only about 4% or 5% of the companies we talked to even measure any ROI at all. I am not saying they should or shouldn't, but I don't think you should feel guilty or bad or inadequate if you are not measuring level 3 or level 4.

**Elliott Masie:** And let me build on it because this is one of my rants. I also don't think we should think that ROI comes out to this simple number, because the reality is, in many organizations, learning is an input to a process. I heard somebody say, "Well, we want to prove what our retention level is, totally in a numeric way from each dollar of training." And I said, "Well go ahead, but it's going to be a phony number, because retention is a function of not only what you do in learning, but what you do in compensation, promotion, management."

The reason a lot of people leave is not because they had bad training, but they have inadequate to really lousy first-level and second-level supervision skills. So, I am with you.

I also think we need to think about sampling more. Very often, people think that when they do these measurement things they have got to measure everybody and then they spend 10 cents a person. I mean, I'd rather go take a sample of 5% of the learners and really spend some time to find out if it worked, what happened, and what else they needed.

**Josh Bersin:** And talk to them?

**Elliott Masie:** Talk to them in that process. Let's do one last quick one and then we'll wrap up. One of the mythologies that I would also put out there is that I believe that a lot of the very best eLearning can be done in ways that don't have to feel like eLearning.

What we are starting to see is a pushback from the classical sort of Skinner box model where you give me a page of content and then you test me on my short-term recall and then I get another one and then

if I get it right, you go, "Good job, Elliott." If I get it wrong, you go, "Boo-Hoo" immediately. And I am not saying there isn't a role for good branching, but our learners get really tired of that sometimes.

Imagine if I taught a class and I said, "Every two minutes I am going to stop and test to see if you remember what I said." Two minutes or -- well, you might stay awake, but I am not sure you would come back. And I think we have got to really stretch in this age of Google and this age where somebody has a mouse and they can drive the things. We obviously have to look at, are we getting to the content in the right way? But it doesn't always have to be this teach and check, teach and check, teach and branch model.

**Josh Bersin:** I agree. I think many, many of the eLearning programs that I have seen are essentially instructor-led design applied to a browser. And again, early on that was great; everybody was excited about it. I think we all know now because of Google, and in fact most of us have broadband, that's not really what we want to do when we are on the internet, particularly in the business setting.

It's different in an academic setting where the learning objective is to really get a deep level of knowledge. A lot of times we have to remember that our job is not necessarily to sometimes not to certify someone, but to give them enough knowledge that they can improve their work performance and then go back. I think that changes instructional design and I agree with you: learning checks and constantly asking people questions is a bit much when you are in an on-the-job situation.

Again, I think this is a fascinating topic we can talk about at Learning 2006, that the instructional design approaches really have to be different now, and I think it's an area of growth for the industry.

**Elliott Masie:** Well, we have just touched the surface here; obviously, there is much more that Josh and I could chat with each other about and engage you in through conversation. And as Josh mentioned, he is going to be one of our major thought leaders at our Learning 2006 Conference. We are really looking at ways we can work together and get synergy in the research that he does and the CONSORTIUM and other outreaches that we do, so we look forward to seeing many of you in Orlando in November and I will give you some links to Josh's site and our site. We look forward to working together. Any last thoughts, Josh?

**Josh Bersin:** Any of you who have not been to Elliott's lab have got to come up here and see it: this is the greatest place. I am just really amazed at what you can do here; and any of you that can come really should. I want to thank you very much for hosting me.

**Elliott Masie:** Great. We have had fun both looking at some of the technologies of the future and also talking about things that are part of our legacy and really important pieces around design. So, for Elliott and Josh, thank you very much and we'll see many of you in Orlando. Have a good day!

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