



The Learning Technology Landscape

By Kathryn Rebilas

In life sciences, learning technology has become an indispensable tool that helps organizations create a more engaging and accessible learning culture. Organizations continue to invest in innovative technology platforms and approaches intended to impact a widespread audience, using a blend of multiple departments as a source of funding. (Figure 1: Source of Funding) On average, headcount/resources to support learning technology initiatives are on the rise. (Figure 2: Impact to Resources).

TGaS Advisors conducted a landscape study in Summer 2015 in order to better understand why organizations are investing in learning technology, what technology is enabling learners' successes, who is using learning technology and how its success is ultimately measured.

Ten pharmaceutical companies are represented in this survey, eight large-tier and two mid-tier. Respondents varied from learning technology leads to department heads, all well-equipped to provide insight into their departments' learning technology initiatives. Based on our experience, these results are generally representative.

Why Are Organizations Investing in Learning Technology?

The primary driver behind responding organizations' investment in learning technology is the reduction in time out of territory for learners. (Figure 3: Investment in Learning Technology) For some companies, this may support the work/life balance of their sales force, while for others it may be an attempt

FIGURE 1 SOURCE OF FUNDING

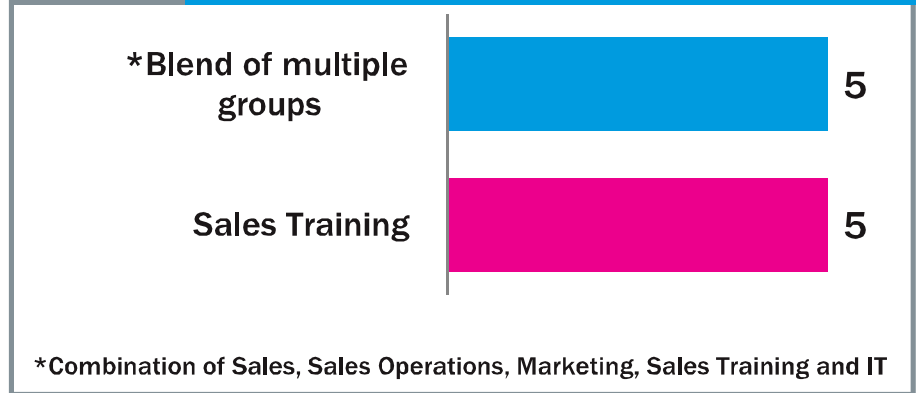


FIGURE 2 IMPACT TO RESOURCES

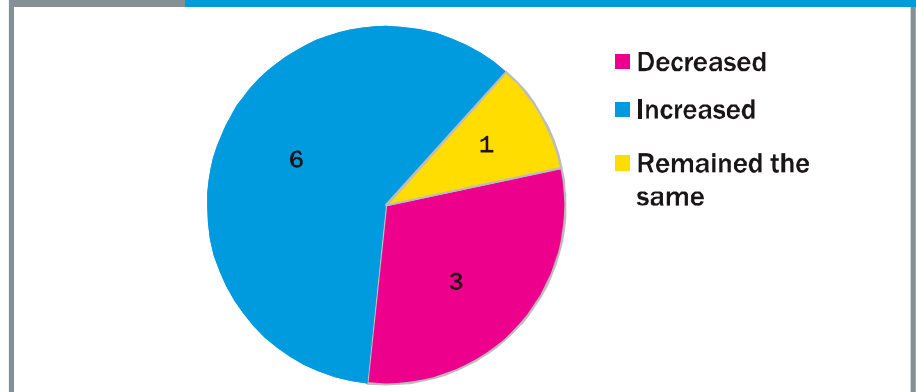
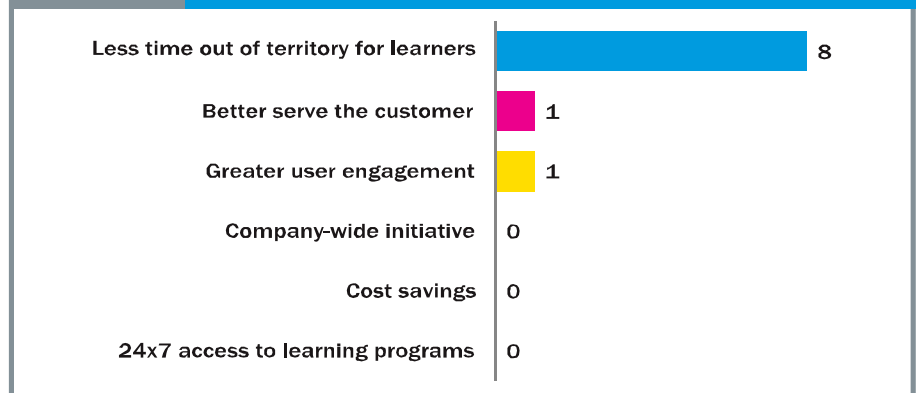


FIGURE 3 INVESTMENT IN LEARNING TECHNOLOGY



to reduce cost of travel and associated live training expenses.

Others may view learning technology as a means to build into their curricula additional learning opportunities that previously did not exist, such as interactive pre-work and pull-through opportunities. Still others see it as a means to support a continuous learning infrastructure.

Efficiently designed learning technology that becomes integrated into learners' daily routines, such as smartphone apps, gives learners a one-stop shop for access to on-demand learning throughout the day.

What Technology is Enabling Learners' Successes?

While companies are using a wide variety of technologies to support their business, what is perhaps more interesting is the kinds of tools and approaches best support their learners' ability to succeed on a day-to-day basis. Tools that can be easily and repeatedly accessed and offer scheduling flexibility are rated most valuable.

Customized e-learning, which tops the list, continues to be the primary modality for providing the crucial product and disease state knowledge necessary for sales personnel. Virtual classrooms, which offer scheduling flexibility and greater learner engagement than the average teleconference, as well as learning content accessed via mobile technologies such as iPads and smartphones, are shown to be most valuable because of the easy access to learning they provide. (Figure 4: Tools and Approaches that Support Role)

Scenario-based gaming, including performance simulations and short learning-based games provided by suppliers, fell lower on the list of approaches that made a difference. A reason for this may be that although many organizations have begun using

FIGURE 4 TOOLS & APPROACHES THAT SUPPORT ROLE

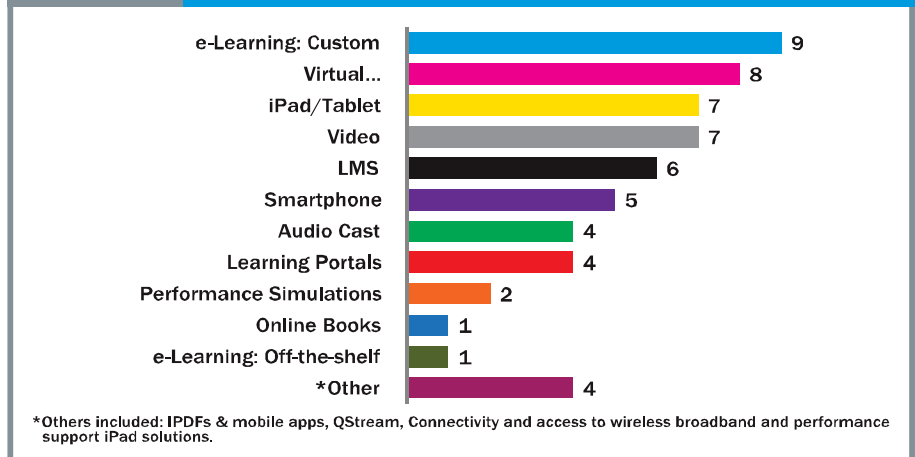
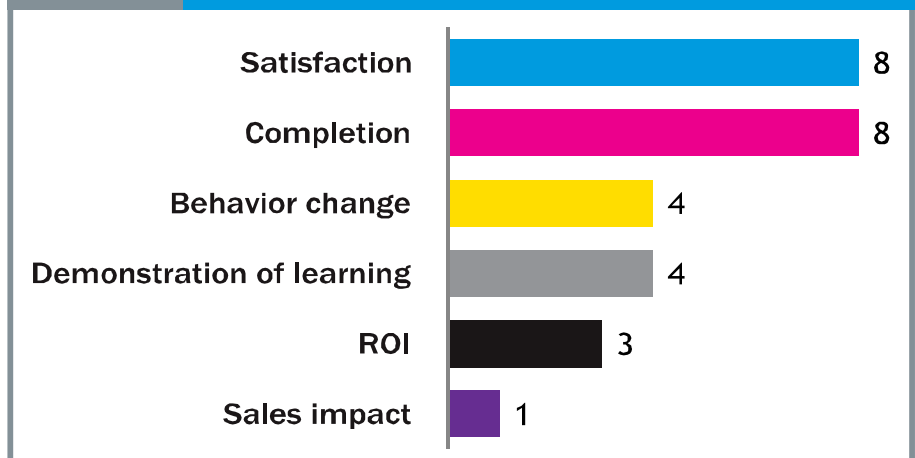


FIGURE 5 TOP 3 AUDIENCES FOR LEARNING TECHNOLOGY

Non-Technology Aspects	Rated 1	Rated 2	Rated 3	Sum
Representatives	7	2	-	9
First Line Managers	1	5	2	8
Account Executives	-	2	2	4
Second Line Managers	-	-	4	4
Home Office Members	-	-	1	1
Senior Sales Leadership	1	-	-	1

FIGURE 6 METRICS TO DEMONSTRATE LEARNING TECHNOLOGY UTILIZATION



gamification elements and platforms within their curricula, they don't yet measure the impact on overall learning.

Who Are the Highest Priority Audiences for Learning Technology?

Given the localized nature of their jobs, sales representatives and first line sales managers continue to be the priority when it comes to implementing and using learning technology. (Figure 5: Top 3 Audiences for Learning Technology) Surprisingly, perhaps, few companies prioritize senior sales leadership when it comes to learning technology. However, companies that report more senior leadership use of learning technology also report greater company buy-in, utilization and investment overall.

In order to increase senior

leadership engagement, some companies provide sales leadership with customized training that enables them to use the technology more regularly in their daily tasks. For instance, virtual classroom technology can be utilized for area-wide meetings to increase engagement and exposure to the tool.

How Do Organizations Determine the Value of Learning Technologies?

The majority of organizations look for metrics to reflect learner satisfaction and training completion in order to justify investment in learning technology. While some also require measurement of behavior change, cost savings or sales impact as a result of learning technology initiatives, many companies find such measurements too expensive and laborious. (Figure 6: Metrics to

Demonstrate Learning Technology Utilization)

Opportunities exist to explore other areas of measurement, including learner engagement and user experience, which breaks down how learners progress through the learning event. Learning more about these areas can provide greater insight into how learners interact with technology platforms and approaches, in turn influencing future design to become more efficient and interactive. ■

About this Study:

Working in partnership with LTEN, TGaS Advisors, a benchmarking and advisory services firm, conducts studies of training and development in life sciences companies. For more information on the 2015 Learning Technology Landscape Study, contact Kathryn Rebilas, kathryn.rebilas@tgas.com.

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