eLearning, mLearning & sLearning: Deloitte FAS’s Leading Edge Virtual Training

Pankaj Singh¹, Leslie Kirshaw²
¹ Deloitte Services LLP/Deloitte FAS Learning, New York, NY, USA
² Deloitte Services LLP/Deloitte FAS Learning, Redding, CT, USA

Abstract — In this paper we describe the challenges faced during the introduction of a new Business Outcome-based Learning methodology at Deloitte Financial Advisory Services LLP (Deloitte FAS) and how an emerging strategy that includes mobile learning and social learning components was used to support this organizational initiative. The blended learning approach provides mobile access to training content, reduces costs and time associated with training in the long-term, and ensures just-in-time access to information. Replication of the traditional instructor-student and peer-to-peer knowledge sharing element is accomplished by means of a WIKI. We discuss how ubiquitous access to a wireless network is changing learning dynamics, the rationale for implementing mLearning, mobile learning & sLearning (social learning) technologies, and how social learning supports eLearning and mLearning.

Index Terms—eLearning, Mobile Learning (mLearning), social learning (sLearning), Collaborative Learning Environment (CLE).

I. INTRODUCTION

Every so often technology dramatically changes the way we do things. In the current environment, there is an urgency to equip learners with creative delivery methods to provide relevant, just-in-time information when and where it is needed. The combination of eLearning, mLearning and the newest training lexicon sLearning (social learning) provides a comprehensive Collaborative Learning Environment (CLE). With the addition of mobile CLEs, educators and learners have the ability to collaborate anytime, anywhere via mobile devices. As the acceptance of mobile learning increases, educators are adding Mobile CLEs to their overall blended learning strategy. [1] This paper describes how Deloitte FAS created a comprehensive course that blended all three learning elements. We discuss how these three elements are applied and how they impact the challenges of the mobile learner. It concludes that the application of a mobile CLE and social learning provides a comprehensive model to which educators are just now starting to adapt.

A. Deloitte FAS’s Business Outcome methodology

Learning is the key to improving business performances. As a result, we strive to understand the objectives of the business and to ensure complete congruence between the desired business outcomes and the planned learning experiences. We work closely with our subject-matter experts to deliver customized, leading-edge, and integrated learning that focuses on business imperatives.

We view learning as a process rather than a one-time event. Prior to the training, we determine the background and participants’ knowledge level of the relevant topics. This allows us to design and deliver a customized learning experience that meets individual learning needs.

By clearly identifying the learning objectives aligned to the business needs that the program is designed to address, we ensure that our participants see the relevance of the learning experience. Furthermore, the instructors, the majority of whom are senior executives, are able to share their understanding of core business issues and how the content of particular training or program is relevant for participants. Subsequently, participants learn how to apply the skills and knowledge they have acquired through the learning experience in the workplace.

In order to facilitate the learning transfer (closing the gap between the learning and doing), most of our courses include a wide-range of action learning such as business simulations and case studies. Such activities aim to maximize retention of learners and to facilitate the transfer of learning from the classroom to the workplace. At the end of the structured learning experience, training and programs focus on helping participants define their learning transfer objectives, which are the core business objectives.

After the structured learning experience, we work with managers and counselors to monitor the follow-through process and to measure results. We have used programs like the Friday5, web-based follow through tool to extend the learning beyond the training session. It helps to ensure and track how learners are applying their newly acquired knowledge and skills in their workplace, get feedback and learn in a collaborative environment. By documenting and analyzing the results of the learning transfer, we gain a better understanding of how to maximize learning to meet business needs through improvements in our trainings and programs.

B. Deloitte FAS’s Learning Methodology

If we were to address the increasing scarcity of talent and impending skills drain as the baby boomers retire; if
we were to address the need to build new capabilities to respond to our clients’ evolving challenges; if we were to harness the strategic power of development as a tool for organizational growth—then we will need to address how development fits within our culture, we will need to enhance our delivery infrastructure, we will need to establish a set of outcome-driven metrics, we will need to put clearer governance in place, we will need to review our curricula and course content, and we will need to bring our investment into line with industry benchmarks [2]. Most importantly, we need clarity about what development means at Deloitte FAS.

In the 2008, we set out to redefine our learning and talent development by holding a series of strategy summits with the high performing senior managers and executive leadership. Discussions, surveys, and exercises resulted in a series of themes on how we could improve talent development at Deloitte FAS. The result was a new strategic direction, endorsed by senior leaders, and a set of initiatives to operationalize the new talent strategy.

C. Impact on the learning organization

In order to accomplish the business outcome using the methodology laid out in the new talent strategy, we clearly had to make our learning leading edge. Meeting the demand for talent makes is mandatory to understand that Gen Y places a premium on use of technology for learning and development.

Growing up with digital media, Gen Y reacts to speed, interactivity, and multiple stimuli. They also have extensive experience reading visual images and monitoring multiple media outlets [3]. Not surprisingly, they are visual, kinaesthetic learners, who prefer to work in peer groups, and learn through experience in a leaderless environment [4]. This deviates significantly from the traditional, classroom style learning that the Baby Boomers (and, to a large extent, Gen X) are accustomed to [5]. Perhaps as a sign of the times, such formal, structured learning programs are losing favor with employers.

II. WIRELESS NETWORKS CHANGE LEARNING DYNAMICS

A. The shift to innovative pedagogy

The ubiquitous access to wireless networks is changing the learning dynamics at Deloitte FAS. In developing the mobile components of our class, we first considered potential mobile devices and features. For knowledge transfer purposes, the video iPod and iPhone offered many of the features of a laptop with the added convenience of their smaller size. The rationale for implementing the mobile components and social components was based on the course content and target audience. The content is procedural and static in nature and the target audience is a broad-base of new employees who are likely to own these mobile devices. Wireless networks not only provide learners with the ability to remotely access instructional materials, but also they provide the added dimension of an interactive and dynamic discussion platform. [6].

B. eLearning components

The foundation of the hybrid course elements were assembled from existing classroom-based materials that were re-purposed for virtual classroom delivery. The eLearning piece of the overall hybrid strategy featured the straightforward approach of using the existing Corporate virtual training architecture. An eLearning delivery storyboard was developed including pre- and post-testing assessments, interactive learning components, and a realistic case study that provides an emotionally engaging environment for the learner as well as a format to validate the material in a meaningful context.

C. mLearning Course Delivery

The virtual class provided the raw content to begin repackaging for mobile delivery via Video iPod and MP3 formats. A mobile delivery storyboard was developed to leverage the virtual class components and identify and remove all synchronous virtual delivery elements. The content was “chunked” into five to ten minute segments that also function as the iPod playlist titles. Here, file naming conventions are critical because they become the section names in the iTunes playlist. At this point, we could have used a recorded version of the Synchronous class, but opted for a clean recording specifically designed for mobile delivery. The Subject Matter Expert (SME) recorded the class using screen and audio capturing technology. Because the mobile learner will most likely be listening to the class via a headset, the audio piece plays a significant role in the training. With the headset, there was an opportunity to “speak” directly to the learner. The recordings were edited for the mobile environment using digital design elements for the small screen.

D. The mobile manual

With the overall commitment to provide a complete mobile solution, the training manual became an inherent problem. With the course itself now available on a mobile device, the course materials had to be viewable in the same platform. For the mobile workforce, printed paper documents are a disadvantage in the "digital age." Widening access to new electronic book technology played an important role in providing an innovative and cost-effective approach for development of a mobile manual. Due to the current lack of standards in the digital publishing world, it was important to create the manual in a format for the most widely accepted mobile device, the iPod. There were several formats to choose from, each with its own distinct qualities and advantages. Some can be printed, some can be read on handheld devices, and some offer a more book-like reading experience. Our goal was to convert an MS Word source document into a format that would be readable on the Apple iPhone or iPod Touch. The steps in this process involved finding one or more applications that could: 1) read electronic books on an iPod Touch or iPhone, 2) convert the Word source document into a format that would be compatible with the reader app on the Apple device, and 3) transfer an ebook from a PC to the iPhone/iPod. We wanted the
formatting of the iPod/iPhone version to look as much like the original document as possible, and we wanted to retain the original document’s heading levels to enable document navigation with the iPod reader’s table of contents.

E. Hybrid strategy

The requirement to develop a new corporate learning methodology provided the impetus to incorporate mobile learning. The mobile learning components of video iPod/and mp3 delivery are used as post-Synchronous mobile learning tools. Over time, based on course content and prevailing corporate culture, the mobile component could eventually become the principal delivery platform for conveying static procedural information.

The mobile strategy also was a tactical response to the requirements for scalability and overall cost savings. The mobile course delivery components are a sub-set of the virtual training delivery, while the eManual provided both scalability and tangible cost saving in production and distribution. This hybrid approach delivers on the need to increase employee knowledge by providing mobile access to training content and reduces the costs and time commitments associated with training in the long-term. eManuals have the added benefit of providing an eco-friendly alternative to traditional manuals by saving trees and the other resources that are used in the production of printed manuals.

III. Social Learning

sLearning refers to what is known as social learning. It is a new term we coined that will soon find its way into the training lexicon.

A. Wiki

Wikiwiki means quick in Hawaiian. A wiki site is a Web site in which users can easily edit any page. The site grows organically by linking existing pages together or by creating links to new pages. If a user finds a link to an uncreated page, he or she can follow the link and create the page.

In business environments, a wiki site provides a low-maintenance way to record knowledge. Information that is usually traded in e-mail messages, gleaned from hallway conversations, or written on paper can instead be recorded in a wiki site, in context with similar knowledge.

Other example uses of wiki sites include brainstorming ideas, collaborating on designs, creating an instruction guide, gathering data from the field, tracking call center knowledge, and building an encyclopedia of knowledge.

B. Social learning strategy

Learning would be exceedingly laborious, not to mention hazardous, if people had to rely solely on the effects of their own actions to inform them what to do. Fortunately, most human behavior is learned observationally through modeling: from observing others one forms an idea of how new behaviors are performed, and on later occasions this coded information serves as a guide for action [8]. We take it a step further by allowing the participants to learn and apply the knowledge in a safe environment of a simulation. By using a simulation, our training program allows participants to interact with clients like they would in a real life project. This not only helps ensure smooth learning transfer but provides timely feedback about the consequences of their actions and an opportunity to learn about and take appropriate corrective measures.

For the learners to learn there should be an intrinsic reinforcement, like sense of accomplishment in addition to a learning transfer in a safe, interactive environment of a simulation. Social cognitive theory emphasizes the connection between internal thoughts and cognition. We think flexible knowledge creation and sharing with peers and experts through wikis, blogs, and communities of practices can enhance the social learning.

C. Social Learning Element

In this example, we have used wiki as a social learning component for learner to continue to learn long after the classroom or virtual session is complete. Learners share knowledge with their peer learners, facilitators, and experts. While a learner is on a real client engagement and has a question, he/she can get on the wiki and search the knowledge repository or ask a question. An expert or peer learner can quickly point or provide a customized response. This not only helps the learner on the assignment but also builds a strong community of learners supporting each other and learning together.

IV. Conclusions

Deloitte FAS’s Business Outcome-based methodology had a direct influence on the development of a mobile collaborative learning environment for our course. By clearly identifying the learning objectives aligned to the business needs, it was essential to develop a multi-faceted approach to support the learner during the training event and on the job. Several creative delivery methods were incorporated to provide relevant just-in-time information when and where the learner needs it. The combination of eLearning, mobile learning, and social learning elements provided a comprehensive Collaborative Learning Environment (CLE). A key part of this strategy was to incorporate mobile CLEs with the ability for educators and learners to collaborate 24/7 via mobile devices. This hybrid approach aligns with our business requirements to incorporate GenY expectations of relevant content, expeditious digital mobile access, and the all-important social aspect. These leading-edge components will prove to be beneficial in attracting top talent to our organization.

In our fast-paced business environment, the Wiki site provides a low-maintenance way to record knowledge and provides centralized place for interactive brainstorming and building a collaborative encyclopedia of knowledge.

How effective is this approach compared to the old traditional classroom solitary learning event? The
Deloitte FAS class illustrates a strategy designed to enhance the effectiveness of both teaching and learning. The objective to increase employee skills and productivity will be measured over time. Measureable success with this class will help facilitate change throughout the organization. How substantial that change proves to be and the extent of its scope are still unclear. The ubiquitous access to wireless networks and the need to quickly respond to business issues and opportunities is changing learning dynamics at Deloitte FAS. The key to a successful mobile CLE training initiative and social learning is to stay focused on the learner’s requirements to be successful, while not getting distracted by technology.

REFERENCES


AUTHORS

Pankaj Singh is a Learning Manager with Deloitte Services LLP, New York, NY 10019. (e-mail: pansingh@deloitte.com).

Leslie Kirshaw is a Consultant with Deloitte Services LLP and co-founder of WebAdvantage, Redding, CT 06896 USA (e-mail: lkirshaw@webadvantageinc.com)

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