STATE OF THE INDUSTRY STUDY
A Pulse on Social Learning
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Executive Summary

Today, the world is grounded in a vast and dynamic world of information and technology. Organizations have access to content like never before, compounded by the Web 2.0 movement. This ability to communicate swiftly evolved into collaboration that has become an intense driver of the “knowledge economy.”

During the last two years we have seen how knowledge management and leadership development via learning are being incorporated more frequently as strategies to increase organizational agility. Additionally, learning organizations that act as strategic enablers for the business are more focused on connecting people to people and content through knowledge management and social technology.

Saba Software partnered with Human Capital Media (HCM) Advisory Group to better understand how business is taking advantage of social learning. In the 2013 survey, HCM examined how organizations are approaching social learning, which methods have proven to be successful and where challenges are experienced.

Research Method

• Surveyed learning leaders at director level and above regarding the use of social learning technologies.
• 505 responses were received.
• Respondents included a wide spread of industries and company sizes as well as local and global companies.

Key Findings

• Learning is a driver: 65.7 percent of organizations are using social technologies for learning to some extent.

• Social learning supports the learning culture: 63.9 percent of organizations are motivated to use social learning to support a culture of learning.

• Discussion and communication reign supreme: 59.5 percent of organizations are using discussion forums, 57.9 percent are using internal blogs, and 54.9 percent are using secure instant messaging to help employees communicate about products, answer questions and address learning at point of need.

• Focus on communities of practice: Currently 53.3 percent of organizations are using social learning to support communities of practice, with 35.7 percent of organizations planning to develop communities of practice via social learning during the next two years.

• Adoption is a struggle for many organizations: Half of the organizations responding cite challenges with adoption and uptake by employees.

What Is Social Learning?

Strategic enablers, who are more likely to use learning technology to increase organizational agility, already see social networks as an avenue to identify and share business and social contacts.\(^1\) Strategic enablers are aware of the value of social media. The progression from social media to social learning is where real forward-thinking learning officers are beginning to tap into the strategic advantage of social learning.

Social learning and the use of social learning technologies should not be confused with e-learning or the adaptation of online tools to streamline the learning process. We know learning is a complicated process that can happen across a variety of modalities and engage a number of learning styles and intelligences. In 1978, Leo Vgotsky defined social learning as the process by which learners engage in interaction with their environment, those in the environment and their peers.\(^3\) At this point in time, social learning required face-to-face dialogue where users came together to learn through shared experiences and participatory discourse. With the advent of online tools, this community of learning culture has evolved to become an online community, even though it is often separated by continents.\(^4\) Social learning is being radically redefined thanks to the use and availability of online social media technologies.\(^5\)

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\(^3\) Ferguson, R. (2009). The construction of shared knowledge through asynchronous dialogue. The open university repository of research publications .

Technology has provided social media users with access to a vast variety of diverse platforms that interconnect, allowing for real-time communication of knowledge through a system of global networks that can communicate at scale. This large network, capable of streaming enormous quantities of information, has enabled social media sites, like Facebook, Twitter and YouTube, to flourish, and has allowed for the creation of hundreds of thousands of Web- and mobile-based applications to take advantage of interaction and information sharing. Social technologies and social media are quickly becoming a go-to source for individuals in an organization who want to increase their knowledge and enhance their performance, becoming a valuable tool for organizations that are attracted by the potential profit gains from collaborative innovation.

Consequently learning leaders in companies of all sizes have looked to replicate this success with the creation of specific online communities of knowledge where users share experience, information and generate creative platforms for social collaboration and innovation. This vast sharing is happening in a virtual platform which allows end users to perform data capture and information analysis in a way that was previously unimaginable. As it is now described, social learning is a synthesis of the social media environment, transforming the potential of collaborative knowledge spaces into environments of interactive learning and sharing, solidly grounded in sociocultural interaction, that allow for the generation of new ideas and customizations that can benefit organizations taking advantage of the practice.

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Adopting Social Learning Technologies

Many organizations are working to maximize on the benefits provided by social learning. Regardless of the challenges, we see a significant trend in adoption of social media and social learning technologies. With 18.4 percent of our respondents stating that they have adopted social learning technologies (Figure 3), and another 47.3 percent reporting adopting social learning technologies to some extent, close to two-thirds of organizations are utilizing these technologies.

Not surprisingly, globally distributed organizations are much more likely to have adopted social learning technologies, with 27 percent who report they have already adopted social learning technologies and 52.4 percent indicating that they are using social learning technologies to some extent. The motivation behind this is equally clear: globally dispersed organizations are motivated to build an online learning culture that has a dynamic learning and sharing environment, supportive of collaboration and innovation.

The ability to expand the organization’s culture of learning at scale also explains why global organizations have adopted social learning technologies more quickly, whereas organizations that are primarily located in one country (Figure 4) or city are less likely to be using social learning (50.6 percent). In an organization that is less geographically diverse, there may be a less pressing need for the maintenance of a sociocultural learning environment, as employees can maintain that environment through daily contact.
Looking at adoption based on the size of the organization (Figure 5), in larger organizations approximately three-quarters (74.1 percent) have adopted social learning technologies to some extent. In a larger organization, being able to foster a culture of learning has extreme value. Midsized and smaller organizations are following suit, showing a very clear interest in using social learning technologies regardless of the size of the organization. Overall, we can see that organizations understand the importance of social learning technologies and are exploring options to find workable solutions for application in the organizational environment.
Motivations for Using Social Learning Technologies

Organizations are highly motivated to utilize social technologies to improve learning, with respondents reporting that the top motivating factor for using social learning technologies was to support a culture of learning (63.9 percent) (Figure 6).

Regardless of geographic distribution, organizations agreed that support of learning culture was the primary use of social learning technologies.

This was followed closely by the use of social learning technologies to encourage collaboration (54.1 percent). We noted that local companies were more likely to be motivated by learning culture, where global organizations were equally motivated by learning culture and encouraging collaboration and innovation. In a global organization, collaboration could require crossing time zones and continents, so early adoption of social learning technologies means a significant business edge.

Figure 6: Top Motivations for Using Social Learning Technologies

- Support a culture of learning 63.9%
- Encourage collaboration and innovation 54.1%
- Connect employees to organization experts 41.8%
- Rapid info exchange to solve point of need problems 33.3%
- Increase learner engagement 31.0%
- Increase transfer of learning to the job 31.0%
- Enhance a classroom or virtual classroom learning solution 28.2%
- Create communities of practice 27.9%
- Reach a broader audience in the organization 25.5%
- Cut costs related to other learning delivery methods 23.5%
- Connecting employees to learning peers/mentors 20.1%
Technologies in Use

To take advantage of the improved organizational capability offered by social learning technologies, organizations are trying a variety of programs and applications. Currently, discussion forums top the list, with 59.5 percent of organizations using this technology (Figure 7). This is not surprising, as discussion forums are almost as old as the Internet itself. Discussion forums are among the most user-friendly of the social learning technologies because of their age. As such they prove to have the most stable functionality with limited errors.

Forums are closely followed by blogs, with 57.9 percent of organizations using some type of blog, either internal or external for learning. This is evidence of another social media technology with origins in the late 1990s gaining popularity as an organizational learning tool. Like forums, blogs have an established reputation, have been road tested to reduce errors and are familiar enough to be extremely user-friendly and accessible to most employees regardless of age and without a high need for technological expertise.

Secure instant messaging completed the top three, with 54.9 percent of organizations reporting adoption of a messaging tool. Secure messaging is one of the best examples of pull in social learning, where a user can immediately request any kind of information, such as support or advice, from a colleague or expert in the company, who can answer in real-time. Where previously getting a real-time answer might require asking a colleague in the office, now a user can ask for and get needed information from a colleague or expert anywhere in the world. Indeed, organizations report the ability to connect employees to experts and rapid exchange of information at point of need as important motivating factors for the use of social learning technologies (Figure 7). When examined closely, we can see significant adoption of technologies that have been user tested and will be familiar to a majority of end users.

**Figure 7:**
**Social Learning Technologies in Use**

<table>
<thead>
<tr>
<th>Technology</th>
<th>Adoption Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion forums</td>
<td>59.5%</td>
</tr>
<tr>
<td>Internal blogs</td>
<td>57.9%</td>
</tr>
<tr>
<td>Secure instant messaging</td>
<td>54.9%</td>
</tr>
<tr>
<td>Communities of practice</td>
<td>53.3%</td>
</tr>
<tr>
<td>Video/video channels</td>
<td>48.0%</td>
</tr>
<tr>
<td>Wikis and other collaboration tools</td>
<td>45.7%</td>
</tr>
<tr>
<td>Facebook style employee profiles</td>
<td>35.5%</td>
</tr>
<tr>
<td>Workspaces</td>
<td>28.0%</td>
</tr>
<tr>
<td>Twitter</td>
<td>16.8%</td>
</tr>
<tr>
<td>Idea engine</td>
<td>11.5%</td>
</tr>
</tbody>
</table>
Among the top uses of social learning technologies is the use of communities of practice. Currently 53.3 percent of respondents indicate they use communities of practice in their organization. The community of practice is a collaborative group that is often generated internally by a group of experts and learners who wish to have an organic space for sharing knowledge, collaborating, and creating new innovations. These communities tend to begin organically and, in theory, are not monitored or controlled by management, but rather are motivated by internal interest in development and collaboration (Figure 8). Inside of a community of practice, learning is interactive when members collaborate and engage in desired avenues of thinking.\(^9\) The community of practice, before the use of social learning technologies, might meet during lunch or have regular meetings to share information. Thanks to the use of social learning technologies, it is possible to start these communities with experts and learners sharing and collaborating on a global scale. These communities are useful to an organization because the shared discussion of problems among experts and explaining solutions to employees learning in the organization can create extraordinary innovations and advances in practice that can benefit the organization and lead to new areas for product development and support.

Communities of practice, while in the top five applications of social technologies, are not embraced equally by all organizations. Larger organizations are more likely to use communities of practice (66.2 percent), as well as instant messaging (64 percent) and blogs (65.4 percent), than smaller organizations, which are more likely to use forums (63.3 percent) and videos (53.3 percent). Further, geographically distributed global organizations are 20 percent more likely to use communities of practice (62 percent) than localized companies (41 percent). However, regardless of size, all organizations are almost equally likely to use discussion forums.

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Common Uses of Social Learning Technologies

Social learning technologies are a natural enhancement for the virtual classroom learning environment, allowing for the type of informal learning that would be seen in a traditional on-site class. Creating environments for sharing, as we have already seen, is a top motivator for organizations to adopt social learning technologies. Fostering an environment of communication is a key strategy in how these technologies are being used (Figure 9).

More than half of the respondents indicate that user interaction via wikis, blogs, discussion forums or other applications is the primary use of social learning technology. This is closely followed by the use of social learning technologies for on-demand access to information at point of need (58.1 percent) and fostering on-the-job learning through communities of practice (56 percent) rounding out the top three. Learning through the use of social interaction is obviously important to organizations, as those who view learning as a strategic enabler place more value in the use of social learning technologies for their ability to address point of need access to information, with 65.1 percent describing access to on-demand, real-time expertise as the primary use for social learning.

Figure 9: Common Use Cases for Social Learning Technologies

- Users interact with wikis, blogs, discussion forums, etc.: 59.6%
- On-demand access to real-time discussion/training/support/expertise: 58.1%
- Foster on-the-job learning via communities of practice: 56.0%
- Coaches, mentors and instructors interact in the learning environment: 44.0%
- Grant real-time access to thought leaders, instructors and subject matter experts: 33.6%
- Crowd-source real-time “how to” information with YouTube videos, images and URLs: 27.1%
- Conduct focus groups and solicit feedback on products, services and courseware: 26.4%
- Share/hyper-distribute new products/services via Twitter, Google and Facebook: 12.3%
- Recommendations based on learning profiles: 11.2%
Organizations favor communication through tested measures like wikis, blogs and forums; these strategies are designed to foster communication and cultivate communities of practice that support the establishment of a culture of learning across the enterprise. Globally distributed organizations are more likely to favor wikis, blogs and discussion forums, whereas local organizations favor coaching and mentoring for the use of social learning technologies. Regardless of distribution, the use of wikis and blogs, and real time access to expert-level information, are among the top uses for social learning.

There is some variation in the use of social learning technologies related to the size of an organization. Small and midsized organizations (Figure 10) are more likely to use social learning technologies for on-demand access, where large organizations are more likely to use these technologies to allow users to interact (62.9 percent) and develop communities of practice (62.1 percent).
Plan to Use in the Next Two Years

Projecting into the future, we continue to see a trend toward increasing adoption of social technologies as a learning and communication tool (Figure 11). During the next two years, one-third of the organizations surveyed report the desire to implement social learning technologies to support communities of practice. This is followed by plans to foster the use of video and video channels (35.3 percent) and continued use and construction of discussion forums, wikis and internal blogs. By creating information internally, including videos, we can see organizations working to put a better tap on Internet content available to end users. When examined closely, it is clear that what organizations want from social learning technology is the space for communicating, sharing and building combined with in-house knowledge and expertise.

Globally distributed organizations, which already favor communities of practice, are planning increased use of video (43.1 percent), while locally based organizations are planning to adopt discussion forums (38.8 percent). We also found that smaller organizations are invested in developing discussion forums during the next two years (34.1 percent) while large organizations are more likely to adopt the use of video (43.3 percent). In midsized organizations there are plans for the use of discussion forums and communities of practice (33.3 percent). As organizations continue to invest in social learning technologies during the next two years, the focus remains on collaborative learning and innovation with support of organizational expert knowledge.
Learning Content Best Suited for Social Learning

Considering two-thirds of the organizations reported the use of social learning technologies, and the focus on social learning technologies to support learning culture, we wanted to know more about what content was best suited for this style of learning (Figure 12). What we discovered was that overall, organizations found social learning was best suited for improved product knowledge (53.9 percent). Social learning is also reported as a suitable tool for onboarding (50.7 percent) and career development (36.3 percent). As some of the most-used technologies are forums and internal blogs, it stands to reason that communicating information about the product and improving understanding of the product knowledge could be simplified with social learning technologies. Communities of practice, where new employees can contribute their experiences, skills, innovations and questions with other experts, would form a space for discoveries through collaboration. Combined, the power of social learning technologies offers excellent support to developing improved knowledge and introducing new concepts, especially to new hires.

There are some notable differences in content based on organization size. Smaller organizations are 14 percent more likely to report product knowledge as the best fit with social learning technologies. Large organizations find social learning fits best with onboarding. Generally though, regardless of the size of an organization, one-third of the respondents felt that social learning was a good fit for content related to building leadership and executive development. This points to the use of social learning as a tool to cultivate leaders in organizations and grow and sustain the social network of organizational leadership.

Besides product knowledge, most of the top answers are areas where it is valuable to have networking as part of the curriculum. New employees are working to meet others within the organization to get connected; those working to move up in the organization need to identify mentors and experts, and leaders need to stay connected to each other to trade information on successes and challenges, where new ideas and innovations might be rooted.
Successes and Challenges

While it is a valuable tool for improving learning and inspiring creativity and innovation, the relative newness of social learning comes with a variety of unique challenges for organizations adopting social learning practices. At the same time there are some areas of great success where social learning technologies are being applied.

One area that organizations struggle with the most is adoption (Figure 13). Respondents reported adoption by employees (uptake) as the top challenge at 50.9 percent, a 10 percent lead over the second top challenge of measuring impact; this was true regardless of geographic location. The problem of adoption may explain why some of the most popular social technologies are those like discussion boards, blogs and instant messaging — tools that have been around long enough to be more widely familiar to the user population.

Respondents cited a variety of reasons for why adoption is such a challenge. One respondent reported, “Some folks just don’t see the value. Social media has a perception of [being] self-promotional and narcissistic.” Another respondent said, “We are struggling to get uptake. For example, we will post [a] question on leadership to our leader teams and will get very few comments back.”

In addition to cultural resistance, concerns were raised about security, lack of support from leadership and a lack of expertise in applying social technologies in a learning context. Utilizing social learning technologies also puts a strain on IT, creating challenges with integration into existing infrastructure, development of new infrastructure and the need to provide additional support and training for new or unfamiliar services.
Following the second key area of challenge is measurement of social learning technologies (40.6 percent) and the time necessary to manage social technology areas like communities of practice and discussion forums. Many organizations are challenged by determining the learning impact of technologies that are intended to foster discussion and creativity without specific requirements. This is especially true of communities of practice that can actually fall apart when over-managed, but will flourish well with minor cultivation. A number of organizations are pushing forward with measurement practices which will be discussed in detail in the next section.

Other key challenges with social learning technologies relate to the time it takes to manage (34.8 percent). Blogs, forums and wikis all require some amount of moderation or management to be sure that posts are timely, relevant and useful. Discussion forums can be especially challenging, as a dead or stalled discussion forum will stifle without use. As one respondent put it, “real-time discussion boards/forums … asphyxiate for lack of resources [if] they’re seen as an option versus a vital source of learning.” Another challenge with discussion forums is the rise of “zombie questions” — questions that continue to get asked long after being thoroughly answered. Essentially, social learning technologies require “content curators” to ensure quality.

Even with these challenges, there are number of areas where organizations are reporting success with social learning technologies. This is especially true when it comes to increasing learning culture and innovation. Learning leaders report success with social technologies that include improved collaboration among class participants, more openness to sharing information across the organization, increased learner engagement and satisfaction, and improved job support. Organizations report increased innovation because of tools like desktop sharing, while others say that social learning technologies have allowed “individuals [to] share knowledge, best practices and respond to immediate technical/functional requests.”

Fears about employees wasting time through social learning was the least of all worries reported by learning leaders (19.5 percent). Social learning technologies offer a valuable communicative space that can enhance e-learning and instructor led training, benefit the organization by supporting new collaboration and creative endeavors, and address learning at point of need. Even with the challenges, many organizations are seeing and feeling success with social learning technologies.

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Measurement

While many industry leaders are driving forward with adoption and incorporation of social learning tools, challenges persist with how to effectively measure the impact of learning. Measurement is a challenge for a variety of learning functions, so it comes as no surprise that it is a concern for those utilizing social technologies. Knowing that there is a need to effectively measure the impact of learning, organizations are embracing some tried-and-tested tools to assess the value of social learning technologies for the organization.

The most popular tool used to measure social learning as reported by respondents is transactional data (Figure 14). Transactional data is easy to collect and analyze, making it an easy access tool that can quickly show organizations how social learning technologies are being used. Following transactional data, 2 out of 5 organizations are measuring learner satisfaction (39.7 percent).

Organizations are looking at how learners are engaged, as 38.5 percent report measuring increased learner engagement. As was discussed earlier, the top motivation for using social learning technologies at an organization is to support a culture of learning, so it is no surprise that almost one-third of the organizations report measuring how these technologies enhance the learning culture.

For organizations with global distribution, transactional data was most frequently used as a measurement of social learning technologies. It follows that most globally distributed companies are already using transactional data to track learning across the enterprise. Local organizations, on the other hand, are more likely to use retention of knowledge acquired or look for a decrease in error rate as a measurement of the impact of social learning. Transactional data was the most common impact measure for midsized and large organizations, where small organizations were more likely to rank learner satisfaction as the top measure. Increased learner engagement and learner satisfaction made the top three for organizations regardless of size.
Conclusion

The digital revolution is far from over, and as it continues to develop, a variety of new uses for social learning will surely arise. For many organizations, learning is a driver that creates a marketplace advantage, and with new technologies organizations will find ever-evolving ways to cultivate the learning culture with social technology. While mature technologies like discussion forums, blogs and wikis currently dominate, it will be interesting to see how micro-blogging and more personalized Web platforms take root in organizations as they become increasing familiar and more stable. As employees and learning officers become more comfortable with social learning and the value it can add to an organization, the challenges with adoption may ease, allowing for even more creative use. Social learning is already proving its value as an enhancement of learning, and the possibilities are as varied and endless as the creativity and innovation that social collaboration can inspire.
Appendix 1: Demographics

Number of respondents: ................................................................. 504

By company size

Less than 1,000 employees: ................................................................. 27.4 percent
Between 1,000-7,499 employees: ............................................... 29.5 percent
7,500 or more employees: ................................................................. 43.1 percent

By Geographic Distribution

Mostly located in one country in one location: ................................. 18.6 percent
Mostly located in one country with multiple locations: .................... 36.1 percent
Mostly located in one country with some global distribution: ............. 15.6 percent
Highly distributed with multiple locations across the globe: ............... 29.7 percent
About

Saba

Saba enables global organizations to build a transformative workplace that leverages the advent of social networking in business and the ubiquity of mobile to empower an organization’s most mission-critical assets — its people. The company provides a set of people-centric enterprise solutions to various businesses and industries worldwide. Saba delivers cloud-based learning, performance, planning and collaboration solutions to transform the way people work.

Saba’s premier customer base includes major global organizations and industry leaders in financial services, life sciences, health care, high-tech, automotive, manufacturing, retail, energy and utilities, packaged goods and public sector organizations. Headquartered in Redwood Shores, Calif., Saba has offices on five continents. For more information, please visit www.saba.com or call 877-SABA-101 or 650-779-2791. SABA, the Saba logo, and the marks relating to Saba products and services referenced herein are either trademarks or registered trademarks of Saba Software Inc. or its affiliates. All other trademarks are the property of their respective owners.

Chief Learning Officer magazine

Chief Learning Officer is the foremost resource in the rapidly growing industry of workforce learning and development. The flagship magazine and related network of publications, electronic media and international events have made Chief Learning Officer the pre-eminent source of thought leadership for senior-level executives. The magazine provides them with constant access to reliable, relevant information, as well as forums for connecting with other global learning leaders.

HCM Advisory Group

Human Capital Media (HCM) Advisory Group is the research division of Human Capital Media Group, which publishes Chief Learning Officer, Talent Management, Diversity Executive and Workforce magazines.

Our mission is to focus on human capital issues that are relevant and important to senior leaders. We specialize in partnered research solutions, creating completely customizable and proprietary deliverables.

Our capabilities include thought leadership research and custom content creation (white papers, research reports, webinars, presentations), as well as market research on customer segments in the human resources industry. Our reports include thorough processing of data with charts, visuals and bullet points that focus attention on the most relevant findings showing industry trends and consumer movement useful for creating research-driven business case presentations.

If you have any questions, contact us at skimmel@humancapitalmedia.com.