REDEFINING PROFESSIONAL LEARNING & DEVELOPMENT:
Technologies and Skills for the Digital Workplace

“CORPORATE LEARNING IS MORE IMPORTANT THAN EVER”
An Interview with Josh Bersin

Josh Bersin
Principal, Deloitte Consulting LLP,
and Founder and editor-in-chief of Bersin
IN THIS ISSUE, WE FOCUS ON PROFESSIONAL Learning and Development (L&D), bringing you relevant stories from diverse industry leaders that can inform your organization’s L&D strategy.

New world, new skills, new learning. As organizations need to train and reskill workers faster than ever, the landscape of professional learning & development is quickly changing. Offering a modern learning experience requires not only investments in new technology, but also a culture that encourages people to learn.

With this in mind, we begin this issue with an informative piece on the skills that will be in demand for the jobs of the future. Problem solving, teamwork, and communication are some of the skills that will be sought-after over the next decade, and organizations will need to collaborate with educational institutions to develop tomorrow’s workforce. How prepared is your organization?

Perhaps incorporating a corporate university might be the first step in the right direction. Today’s corporate universities are at the cutting edge of learning and development, and are a great avenue to increase employee engagement and retention, and to develop the leaders of tomorrow that will be able to effectively take your business in the right direction as priorities shift.

We had the privilege of sitting down with Josh Bersin, principal at Deloitte Consulting LLP, and founder and editor-in-chief of Bersin, the leading provider of research and advisory services focused on corporate learning. According to Bersin, “Corporate learning is more important than ever,” and companies should invest in the tools and resources that deliver the type of learning people want and aspire for in today’s “always-on workplace.” Companies like Training The Street, a leader in financial education in the United States, is using online learning as part of its global expansion strategy, offering online courses to engage learners when taking time away from the desk is increasingly more difficult. Similarly, Manchester-CF, a leader in financial crime prevention training based in Toronto, Canada, is now training thousands of subscribers globally after successfully migrating to online learning. Finally, explore how NASTAD (National Alliance of State and Territorial AIDS Directors) has been strengthening domestic and global governmental public health through capacity building, relying on a virtual learning environment to deliver its L&D programs.

Many thanks to all who contributed to this special edition, and hope that you take away key insights that will enhance your own L&D strategy. As always, we invite you to share your own success stories that will enhance the community globally, and wish you much success in your learning and development endeavors.

Sincerely,

The E-Learn Team
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Professional Development:

New world, new skills, new learning. As organizations need to train and reskill workers faster than ever, the landscape of professional learning & development is quickly changing. Offering a modern learning experience requires not only investments in new technology, but also a culture that encourages people to learn.
We are now at the beginning of the Fourth Industrial Revolution. Technological advances, along with socio-economic and demographic developments, will continue to impact society in the next decade—causing changes in business models, teaching strategies and workplace arrangements. Are professionals, employers and educational institutions ready for the challenge of developing the new skills this future will demand?

**New Jobs Will Demand New Skills**

In many industries and countries, the most in-demand occupations or specialties did not exist 10 or even five years ago, according to the World Economic Forum. The organization also estimates that 65% of children entering primary school today will end up working in completely new job types that don’t yet exist.

The report “Jobs Lost, Jobs Gained: Workforce Transitions in a Time of Automation,” published in December 2017 by McKinsey Global Institute, has reached similar conclusions. A total of 60 million to 375 million individuals around the world may need to transition to new occupational categories by 2030. McKinsey predicts, based on an analysis that covers 46 countries and reaches almost 90% of the global gross domestic product.

McKinsey estimates that activities within all occupations will shift. New work will evolve, requiring “more application of expertise, interaction and management,” as well as “social and emotional skills and advanced cognitive capabilities, such as high-level logical reasoning.” As only a limited number of jobs require these capabilities today, developing such skills should be a challenge for education, which currently does not always emphasize those ‘soft skills.’

The shift seems to be already happening. Data from LinkedIn shows that professionals are increasingly marketing themselves around softer skills, which are less automatable.

**Lifelong Learning Will Be the Norm**

“To be successful in the next decade, individuals will need to demonstrate foresight in navigating a rapidly shifting landscape of organizational forms and skill requirements,” says the report “Future Skills,” published by the Institute for the Future (IFTF).

According to the study, future workers will need to be adaptable lifelong learners, as “they will increasingly be called upon to continually reassess the skills they need, and quickly put together the right resources to develop and update these.”

For their turn, the report emphasizes that “businesses must also be alert to the changing environment and adapt their workforce planning...
Students Will Learn More on Their Own

Institutions are not always providing enough of the skills that students and workplaces need. As a result, "some students are taking it into their own hands to make up for deficiencies within the education system," according to a study from The Economist Intelligence Unit, sponsored by Google.4

That seems to be a trend for next decade. Taking "greater personal responsibility for acquiring and continuously updating skills and attributes that will be at a premium in future" is a recommendation in the report "The Future of Work: Jobs and Skills in 2030," published by The United Kingdom Commission for Employment and Skills (UKCES).5

The document explores four possible scenarios for the UK jobs and skills landscape 12 years from now, and suggests key areas for consideration by individuals, employers, policy makers and training providers.

Professionals are encouraged to "change [their] mind-set regarding the nature of work as it becomes less location-specific, more network-oriented, project-based and increasingly technology-intensive." It also says it’s important to "be open to and take advantage of new and different approaches to learning, such as self-directed, bite-sized learning, peer-to-peer learning and technology-enabled training opportunities."

UKCES also suggests that individuals include skills and training opportunities as part of contract

### 13 Skills for the Future

<table>
<thead>
<tr>
<th>Skill</th>
<th>Description</th>
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<tr>
<td><strong>Problem Solving</strong></td>
<td>Addressing problems and developing solutions is a universally needed skill, and it should grow in importance as professionals gain more autonomy.6</td>
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<td><strong>Team Work</strong></td>
<td>In our increasingly connected life, with workplaces becoming more and more team-oriented—being able to interact constructively with people offering different skills and viewpoints, and appreciate alternative perspectives is vital.7</td>
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<td><strong>Communication</strong></td>
<td>This one is a classic. Effective communication, both oral and written, will remain vital in the future workplace. And that includes foreign language skills.4</td>
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<td><strong>Virtual Collaboration</strong></td>
<td>The nature of work is changing, with more fluid employment arrangements, flexible work schedules and the growth of remote work. These new dispositions tend to save commuting time, costs and resources, but they also require new competencies such as the ability to collaborate virtually.3</td>
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<td><strong>Leadership</strong></td>
<td>In the future, leadership should remain a critical skill, but new forms of leadership will be in demand. For example, the ability to manage a more diverse workforce, operate from different locations on a project-by-project basis and to offer motivation and guidance.6</td>
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<td><strong>Resilience</strong></td>
<td>The ability to adapt to change, overcome challenges and recover from setbacks will be more and more needed as the workplaces undergo increasingly rapid transformations.4</td>
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<td><strong>Cross-cultural Competence</strong></td>
<td>Cultural agility, or the ability to operate effectively across a broad range of environments, will become even more important, including language skills and the adaptability to quickly switch between contexts in a globally connected and diverse world.5</td>
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<td><strong>Social Intelligence</strong></td>
<td>The emergence of social media in the last decade has raised many questions about how we create and sustain relationships. Social intelligence will be a critical skill for both managing relationships and adapting to new kinds of workplace scenarios.5</td>
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<td><strong>Sense-Making</strong></td>
<td>As artificial intelligence and smart machines are being used more and more to automate activities, there will be increasing demand for the kinds of skills that machines cannot perform well. Those higher-level cognitive skills are the ones that help us create unique insights that are critical to decision-making.5</td>
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<td><strong>Digital Literacy</strong></td>
<td>New types of media, technologies and tools demand professionals to become fluent in these new contexts in order to understand how to receive information and subsequently interpret the world. This includes the ability to learn from online courses and digital tools.</td>
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<td><strong>Cognitive Load Management</strong></td>
<td>The unprecedented amount of data we need to process from multiple sources everyday makes it a challenge to skillfully manage one’s cognitive capacity. The ability to focus, to deal with the &quot;culture of interruption&quot; and to stay productive in our cognitively overwhelming environment is already crucial.3</td>
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<td><strong>Transdisciplinary Thinking</strong></td>
<td>Some of the most interesting developments in recent years have come from interdisciplinary practice. That means integrating fields and perspectives or, as writer and theorist Howard Rheingold explains, &quot;speaking the languages of multiple disciplines.&quot;5</td>
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<tr>
<td><strong>Self-management</strong></td>
<td>As work models become more fluid and flexible, employees are expected to have more responsibility for skill development. Self-management and the ability to promote one's personal brand will become increasingly vital.5</td>
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negotiations with employers and keep in touch with relevant labor market developments.

**Corporate Learning Will Grow Stronger**

When it comes to employers, UKCES recommends leading the way and taking responsibility for developing the skills needed for business success. Collaboration is recommended and will play a key role in this success. This includes collaboration with the education and training sector to access critical skills, industry-wide collaboration by business to address key skills challenges and collaboration with government to develop sustainable career and learning pathways for young people.

Companies already seem to be moving toward that direction. According to Deloitte Consulting, the corporate L&D industry is now more than $140 billion in size and continues to grow.

Thanks to online learning and digital tools, L&D programs have been reinvented in recent years, and “careers and learning” have become the second most important topic among CEOs and human resources leaders — only topped by “organization of the future.”

That data indicates the necessary alignment between education and business is possible — and it has already begun. In a world where previously valued skills are becoming obsolete, companies are realizing that learning—and in particular online learning—is critical to future business success. Although online learning began more than 20 years ago, more companies are finally starting to realize the benefits of online and blended programs, and how they can help their remote and diverse workforce continue to grow and develop.

According to Chief Human Resources Officers (CHROs) and other senior talent and strategy executives from 371 leading global employers surveyed by the World Economic Forum, the need for new roles and skills in today’s organizations, online and blended learning options can provide opportunities to better engage teams and future leaders in this challenging scenario.

**IS YOUR ORGANIZATION PREPARED FOR THE FUTURE?**

As corporate L&D initiatives develop and grow to accommodate the need for new roles and skills in today’s organizations, online and blended learning options can provide opportunities to better engage teams and future leaders in this challenging scenario. Professionals, employers and educational institutions must be ready to promptly adapt to this new reality. Are you prepared?
“Corporate Learning Is More Important Than Ever”

AN INTERVIEW WITH JOSH BERSIN

In today’s “always-on” workplace, companies should not be afraid to invest in new tools and platforms that deliver the learning people want and aspire for, says Josh Bersin, principal, Deloitte Consulting LLP, and founder and editor-in-chief of Bersin. “Artificial intelligence, chatbots, video, and virtual and augmented reality will significantly change learning in the years ahead.”

BY: PRISCILA ZIGUNOVAS AND JOSH BERSIN
OAKLAND, CALIF., UNITED STATES
In this interview, Josh Bersin talks about the transformations that are taking place in the learning & development segment and analyzes the trends and challenges that will shape the future of corporate learning.

E-LEARN: What changes have you observed in L&D in the past 10 years?

JB: Ten years ago we were building page-turning e-learning programs and they barely ran on mobile devices. The content was really a “repurposing” of instructor-led training and much of the content development was based on the ADDIE model. We developed the concept of “blended learning” (which is now called “flipped learning”) so people could study online and then attend a class in person. And we had very traditional learning management systems, which arranged content into courses, programs, and curricula.

As social media entered our lives, of course all employees and leaders are very focused on reskilling and upskilling their people (at all levels) and the appetite for modern, easy to consume learning is enormous.

E-LEARN: How do you foster and build a learning culture within the company? What are the main issues for a company to become a high impact learning organization?

JB: In all the research we’ve done (and we’ve done a lot), we always conclude that no matter how good or weak your learning technology is, it’s culture that matters. When a company has a “culture of learning” – people take time to reflect, they have time to learn, they talk about mistakes in a positive way – people can learn. While technology-enabled learning is important, it’s not as important as giving people mentors, sponsors, and experts to learn from – and giving them the time, rewards, and environment to learn at work.

E-LEARN: What is the key to creating a successful L&D program that really impacts the company results?

JB: I’ve written two books on corporate training and it’s not a simple process. The first step is to really diagnose the problem you’re trying to solve. Is your “sales training” program designed to help people sell? Upsell? Increase new sales? Or increase close rates? The clearer and more prescriptive you are in problem definition the easier it is to really identify the learning objectives and the learning gaps.

Second the designer must use what is now called “design thinking” (we used to call it performance consulting) to understand the learners’ work environment, existing skills, educational background, and managerial environment. A training program alone won’t solve a problem if it doesn’t reinforce and support the entire work environment. This also means understanding what type of learning experience will really “grab” the employees and get them to pay attention. And this also involves interviewing people in the role, to see what gaps exist.

Third, the designer must build a set of small, easy to absorb, highly interactive learning experiences, content, and interactivities that drive a learning outcome. This is the instructional design stage, and the designer should be up to date on the latest technologies and approaches. Right now micro-learning, virtual and augmented reality, chatbots and video are really exciting approaches. But often a face to face exercise, simulation, or project is needed.

If you do all this work, and test and iterate on your design, your program will really drive value. I always encourage L&D leaders to evaluate learning by asking employees “would you recommend this?” and “have you used this?” This kind of practical analysis helps you stay grounded in reality, and not spend too much time creating academic content that may not really drive the business result.

E-LEARN: Recently you characterized Blackboard as a “Program Experience (Delivery) Platform.” Can you speak more about what that means and how Program Experience (Delivery) Platforms impact business and learning at organizations today?

JB: Yes. Throughout the L&D market companies need platforms to help them design, build, implement and measure their training programs. The original LMS vision was to be this platform, but it really became a learning “management system” and not a true “learning system.”

Today, given the enormous growth in micro and macro forms of online learning, there is a need for a new set of platforms. These include systems that can manage content, administer traditional training, and programs that can bring together instructor facilitated programs (ie. leader-led or instructor-led courses) in high-fidelity programs like onboarding, sales training, customer service training, ethics, and other high consequence programs. Blackboard falls into this category. Where most education has a teacher, Blackboard’s platform provides a solution for training programs that involve an instructor, a subject-matter expert, or a mentor or coach. Many companies need this type of solution, and Blackboard’s specific design can be useful for many training applications.

E-LEARN: What are micro and macro-learning and how can companies help employees identify what type of learning they need?

JB: Every learning solution has macro and micro-topics. Fundamentals, background, and theory are always macro or longer-form topics. For example, if you want to learn how to become a Java programmer, you need fundamental education in data structures, syntax, language, and use of...
the various Java tools. Once you become a programmer and learn how to code, however, you may need lots of “add-on” education which teaches you special techniques, solutions to common problems, and small answers to typical questions in a micro format.

This blend is common in every type of learning. Macro learning is fundamental. Micro-learning is applications, answers to questions, and new applications.

**E-LEARN:** How can companies select and apply technology in a way that truly engage workers in their learning programs?

**JB:** As I mentioned above, the hot new topic is “learning experience design.” What will it really feel like to take this course or program? Will it fit into the flow of work? Will the learner enjoy it and feel compelled to complete it? Will the learner meet others and feel inspired to create a community from this course? Will it help them move their career goals forward? Will it provide the types of learning (auditory, lecture, example, simulation, virtual reality, video, project, etc.) that the learner enjoys and remembers? Will there be enough “paced learning” to let the material sink in and really stick? All these questions are independent of the topic, and they represent the excitement and design opportunities for learning leaders to build something truly amazing for their companies.

An oil and gas company I know recently built a 3D virtual world to teach employees about the formation of fossil fuels. The experience is more fascinating than a movie, and extremely memorable. This type of program would be boring in a classroom and probably boring in traditional e-learning, but using virtual reality and 3D animation they made it compelling and very memorable.

**E-LEARN:** You have mentioned in a lecture that companies tend to increasingly reward workers for skills and abilities, not position. At the same time, recent research indicates that people are looking for non-traditional, short-term degrees and certifications. They want to learn specific skills that help them grow and evolve at work. How can corporate learning contribute to that?

**JB:** Every organization rewards people for their formal education, certificates, and certified skills. But beyond that, real performance is based on an individual’s true abilities, experiences, their natural gifts, and their desire and passion to solve problems.

These “non-certifiable” areas of capabilities are what we try to assess in behavioral interviews, reference checks, and on-the-job assessments and exercises. Knowing that someone is “certified” in Sales or Engineering may mean nothing about their actual experience and capabilities in different domains of these fields.

We in L&D have to help recruiters vet this out, and our true learning challenge is to identify these “non-certified” capabilities and skills and teach people to focus on improving in these areas, giving people experiences to learn.

**E-LEARN:** Research indicates that individuals now are working harder and they are more distracted and less productive than ever. In a scenario where employees are overwhelmed by information, how can companies make continuous learning easier?

**JB:** This just gets back to the topic of experience design and micro-learning. Can you give me “just enough” learning to solve my problem without forcing me to complete a course when I don’t need it? That’s the magic of a modern learning experience today.

**E-LEARN:** What trends will define the future of corporate learning?

**JB:** In summary, I would say that corporate learning is more important than ever. Today, we have a vast amount of new technology, terminology, and concepts to teach people. But at the same time we want to teach people “how to perform better” – as technical professionals, managers, leaders, or workers. These “performance learning” programs are always custom-designed and need to reflect “what works in your company.” So our job in L&D is to apply all the new technologies and design approaches to making our particular company perform better.

Finally, I would say that artificial intelligence, chatbots, video, and virtual and augmented reality will significantly change learning in the years ahead. We now have algorithms that can observe what works best, communicate with us in human language, and show us how to do something that might be expensive or dangerous in the real world. I strongly urge L&D professionals to experiment with these new tools, many will become the most powerful technologies and solutions in the future. And of course don’t be afraid to invest in new platforms. Now is the time to look for new platforms that deliver the learning people want and aspire for in today’s “always-on” workplace.
The corporate learning and development (L&D) industry is more than 140 billion U.S. dollars in size.1 With the development of digital content and tools, educational programs and training courses are being reinvented for instant online access—enabling businesses and employees to learn like never before. Corporate universities are one of the resources companies are adopting to promote learning among employees.

Although not a new concept—General Electric was considered to have created the first corporate university in the 1950’s—corporate universities seem to be making a comeback. It’s certainly worth the investment, as organizational culture is usually addressed through individualized learning opportunities. A survey by the Boston Consulting Group (BCG) shows that the number of formal corporate universities in the United States doubled and grew to approximately 2,000 between 1997 and 2007. Today, you’ll find them at more than 4,000 companies all over the world.3

Defining the role of the corporate university is more than just placing a logo on company training courses and materials. They usually have two distinguishing features: 1) A dedicated facility (whether brick and mortar or online), and 2) a curriculum tailored to the company’s overarching strategy.2

Creating an L&D program can offer both your company and your employees many benefits. Here are just a few:

1 CONTINUED EDUCATION/CAREER ADVANCEMENT
A corporate university can inspire employees to learn and develop new abilities and skill sets. It can promote ongoing learning by producing a framework that includes certification programs and career advancement opportunities through continued education.

2 EMPLOYEE RETENTION
A significant number of employees will choose to remain at a company that allows them to develop and grow, along with career advancement opportunities. Employee retention is an important cost-benefit for companies as the average cost of hiring a new employee is around US $4,129.4

3 ENHANCED COMPANY BRAND
Corporate universities offer multiple marketing opportunities to promote an organization’s brand and image. Such branding can go beyond employees and include partnerships with other companies and educational institutions.

4 GREAT ROI POTENTIAL
Although creating a corporate university requires an investment, the return can be quite significant. This can be achieved through employee development and retention, knowledge management and improved team results.

How to Set Up a High-Impact Corporate Learning Program

Starting With a Corporate University

In today’s increasingly competitive world, companies are continually looking for ways to evolve and transform their organizations. Executives are now counting on their leaders to develop businesses that can rapidly respond to change and address specific business challenges through employee learning and development.
Here are some key points to consider in order to keep your initiative running smoothly and efficiently:

**First Steps to Setting Up a Corporate University**

1. Determine with the senior executive team how learning supports the organization’s strategy and vision.
2. Identify how to align training activities with organizational initiatives.
3. Develop a vision, mission and value statement.
4. Identify the best program experience platform to help achieve the corporate university’s goals.
5. Create a rollout plan and ensure that it touches every part of the organization.
6. Work with your marketing team to create an internal marketing and communications plan for the corporate university.
7. Evaluate learning initiatives—determine how to define and measure success, considering the company’s business goals and strategies, what the company strives to achieve in terms of human resources (retention, development, etc.), and how it impacts customers and stakeholders.
8. Build communities of practice—a “community of practice” is a group of people who come together to capitalize on their collective knowledge on a given job role or function within a company. They can be formal or informal and often use some type of technology to enable collaboration.

**Tips on Managing a Corporate University**

- Make marketing a core component—work closely with your marketing group to brand your corporate university.
- Operate like a business.
- Embrace technology—by using the right technology, learning can become continuous, immediate, and dynamic.
- Use the power of recognition—remember that individuals like to be recognized, so maximize this power to drive the success of your initiative.
- Create detailed plans and assign clear owners to each task.
- Use recognition—remember that individuals like to be recognized, so maximize this power to drive the success of your initiative.
- Think of learning as an ongoing process—learning should be a process and not just an event or one-time training program.
- Consider offering certification or degree programs—offer long-term development plans for employees, with the opportunity to obtain a professional certification or corporate university degree.

Today’s corporate universities hardly resemble the dull training programs of yesterday. By shifting the focus away from the organizational benefit and placing it on the individual benefit, corporate universities help learners realize the advantages of continuing education. Developing a curriculum that truly focuses on the individual is the best way to extract both the raw talent and the potential from each and every employee.

**Sources**

1. The Disruptive of Digital Learning – 10 Things We Have Learned [PDF]. (n.d). Deloitte Development
Learning and Development Programs

Individuals are more engaged when receiving development opportunities. Learning and Development (L&D) programs aim to improve employee performance by sharing knowledge and enhancing skills, and play an important role in an organization’s talent management. With the implementation of an L&D program, individual performance can be aligned with organizational goals so that structures and processes can be enhanced—and best practices disseminated.

Through Capacity Building Assistance (CBA) and technical assistance, the National Alliance of State and Territorial AIDS Directors (NASTAD) is strengthening both domestic and global governmental public health. For over 20 years, this leading non-profit organization has helped often-marginalized populations around the world by improving the performance of public health officials throughout the Americas, Africa and Asia. Technical assistance and L&D programs offered through online learning modalities currently play an important role in helping achieve this, while also promoting the effective use of public health systems.

Vrushabh Shah
Senior Associate, Prevention at National Alliance of State and Territorial AIDS Directors (NASTAD)
L&D programs at NASTAD are focused on promoting HIV and hepatitis prevention. The organization develops the programs and disseminates best practices among health departments, enabling them to meet the needs of target populations, as well as to share knowledge with their peers.

NASTAD works with local partners to help health departments and ministries of health around the world find more cost-effective methods to improve outcomes—an approach that optimizes efficacy and provides online technical assistance platforms aimed for capacity building. To support those partners, NASTAD leverages the experience of peer public health experts, so that methods, tools and resources are adapted to the local context, and progress can be rapidly achieved.

NASTAD relies on virtual learning tools to deliver its L&D programs. Not only are they effective and help with waste reduction, but the platform truly helps to strengthen public health—as members learn, share expertise and work together to solve common problems. NASTAD leverages online learning methods and tools to enhance technical assistance, and capacity building to achieve a highly cost-effective training.

Vrushabh Shah, NASTAD’s Prevention Team senior associate within the CBA program, notes that a digital learning environment makes L&D programs more intuitive and effective, with tools that engage learners and provide multiple ways to present content and interaction among peers.

“What previously had been done in a meeting, can now be done via a video conferencing solution, such as Blackboard Collaborate. Professionals at health departments can log into Blackboard, and find what they need with a couple of clicks,” Shah explains. “In addition, we also have webinars and different learning communities on our Blackboard Learn, which allow us to share resources, have discussions and enable learners to join multiple programs where they can get technical assistance in different areas, get resources and have discussions with other peers—all through a digital learning environment.”

He also mentions that some of the resources are permanently kept in their digital learning environment, so that users can quickly find what they need. “In terms of tools, for example, we keep a map on Blackboard created for health departments who want to learn how to implement practices in Data to Care, a public health strategy that aims to use HIV surveillance data to identify HIV-diagnosed individuals that are not currently in care, and link them to it,” says Shah.

**Acting Globally**

Digital tools are especially relevant in NASTAD’s Global Program, which works to build the organizational and human resources skills of counterparts across the world by using a peer-to-peer capacity building framework that helps local leadership plan, manage and evaluate programs. NASTAD Global leverages the expertise of U.S.-based public health practitioners, and pairs them with international public health peers to enhance national health systems.

“Domestically, we work with the health departments. In the global team, we work with local jurisdictions. We provide technical assistance and CBA from peers who are already on the ground or from experts who have already done the work, and make sure that they are connected to peers who benefit from that work they’ve done. In general, we do all of our technical assistance and capacity building through a peer-to-peer training model,” explains Shah.

**Learning technology is a cost-effective strategy for providing technical assistance and capacity building abroad, and a more efficient way to assess gaps and deliver content.** “We used to provide all the assistance in person or over the phone, but we noticed a lot of gaps, and many things that just couldn’t be done,” says Shah. “This model has allowed us to provide personal assistance via virtual meetings and, as a result, it has definitely reduced time and costs. It has also offered us opportunities to explore new models to reduce learning barriers. If there is an operational or financial limitation in a health department, staff will benefit from high-quality online technical assistance and the fact that they don’t have to travel to get it.”

**An Inclusive Approach**

NASTAD provides assistance based on local jurisdictions and local government concerns. Most requests for technical assistance and CBA come from a system called CRIS (CBA Request Information System), a web-based application that enables Centers for Disease Control and Prevention (CDC) and healthcare organizations to request assistance.

NASTAD assesses needs, tracks progress and ensures organizations receive tools to continue communicating with the health department involved in the peer-to-peer training, so they have all the best evidence-based models and resources at their disposal.

“The most important aspect is making sure there are solid connections on the ground that the health department will be able to leverage. But we often hear from health departments that they just need a template or guideline, or that assistance is necessary to implement a certain kind of program,” says Shah.

NASTAD plays an important role in program implementation, which typically takes place in the following order: establish partnerships, assess needs and define priorities. Subsequently, data and evidence are used to guide the program design, later transitioning it to the local government. This last phase is what defines the success of the program.

“We assess whether the goals were achieved based on how successfully the local jurisdiction was able to implement a program or a model of care. If they are using our technical assistance or that of another health department, that is good, but it doesn’t mean much if they are not able to move the dice forward. When we leave, they should be able to monitor, implement and design an intervention, with NASTAD getting information from the partner government agency through feedback sessions,” comments Shah.
The duration of training varies, depending on its structure. Some training may last around six weeks, with weekly webinar sessions. Some may last for months. And some training may be ongoing—with a program based on resource sharing and featuring an undefined timeline. “It depends on what resources we are sharing with them, what interest they have in that specific topic area, and what their on-the-ground needs are.”

“I think there are many opportunities to use online learning in our programs, because staff under training is able to be engaged faster. It depends on what the needs are, but in general, having more options available benefits health departments, says Shah. “We’re able to find out what their needs are within their health department and post-check whether they like this system. So we can make sure what we’ve done is useful and important for them. As a result, we saw an improvement in our outcomes, because it keeps us focused on what they need so we direct our effort.”

**Connecting People**

NASTAD Global provides peer support to help local partners define needs, opportunities and outcomes. Facilitating the design, development, implementation, evaluation and institutionalization of initiatives—NASTAD Global improves access to care and supports treatment adherence.

Providing content is an important part of the programs. To achieve NASTAD’s goals, it is essential to have a well-structured communication plan and tools that enable the collaboration and interaction between peers to sustain enthusiasm over the long term. Stakeholders need to be aware of learning opportunities and create a culture in which learning is routine.

“The short-term benefits of this kind of program are the creation of immediate networking opportunities, capacity and education. In the long-term, we are able to better implement a health program or a public health intervention, because they have attempted with the models the other health departments have already utilized and learned from,” adds Shah.

Programs are implemented under the direction of a local partner, leveraging technical support in a peer-to-peer approach. Success is achieved when local government takes the lead role in design, implementation and long-term management of needs-based public health programs.

“This has been our model since our inception. And it is a very successful model, because we found that people on the ground are a lot more concerned about how the other health departments are doing similar work,” comments Shah. “With online learning, we make sure we’re giving staff what they need in real time, and the concerns are heard in real time. We are catering based on these needs a lot faster than we would if we had meetings in person. It is a win-win for both sides.”

“We’ve been training people for over 20 years now. We have reached over 100,000 people throughout dozens of countries, including the 50 United States and in all U.S. territories. We see many health departments coming back for technical assistance, which means that they are benefitting from the training we’re offering, and this is very gratifying,” says Shah.
TRAINED THE STREET:
Leader in Financial Education Uses Online Learning to Boost the Student Experience

**by: Priscila Zigunova**
Charlotte, NC, United States

From teaching Wall Street bankers to delivering globally recognized training programs online, Training The Street is now the world’s leading financial learning services company, offering courses in accounting, capital markets, financial modeling and valuation for finance professionals.

**Global Expansion Through Online Learning**

Online learning plays a big part in that strategy. According to Riddick, online courses can be very helpful to engage learners—as it may not be realistic for many organizations to take an entire group off their desks for a few days to do training.

During its first 13 years of business, the New York City-based company exclusively offered face-to-face instruction. It was in 2012 that they started using Moodlerooms, primarily as a testing engine to offer quizzes and assessment for students.

“We started using it more as a complement to our live instruction, incorporating online videos, files and other exercises. Now, that’s just continued to evolve for us and we’re using it for online-only self-study courses as well,” says Thomson.

Thomson said Moodlerooms is a very flexible LMS and proved to be a good solution for the company, because it offers all the benefits of Moodle’s open source technology, as well as a wealth of plug-ins and components that can be added.

“We also have taken advantage of the managing-hosting support from Blackboard, which makes sure everything’s working well, that everything’s working together seamlessly,” he said. “We don’t have a dedicated IT department, so it’s nice to know that Blackboard is there managing the under-the-hood stuff, but at the same time we get a lot of the benefits that open source Moodle provides.”

The primary focus of TTS is training new financial professionals, including investment bankers, private equity firms, asset managers and consultants.

“Most of what we do is very technical. It’s a lot of work in Excel for you to create financial models and build the skills to value a company, mergers and acquisitions and...”
leverage buyouts,” explains Riddick. “With that technical slant, we’ve found Moodlerooms to be a good complement to be able to provide some other styles of learning to complement what we do well in the classroom.”

Riddick adds that the familiarity students have with the LMS from using it in previous classes is also a big plus.

**Resources and Tools**

Video is one of the main resources used in TTS training programs, according to Thomson. As the company is a big proponent of the flipped classroom approach (see box), students are often asked to watch lecture videos as homework.

“That way we can spend classroom time doing more engaging things and more hands-on activities, like using the news forum for collaboration and group projects, for example,” says Thomson.

In Moodlerooms, one of the most-used tools is the Personalized Learning Designer (PLD), which allows instructors to create different adaptive learning paths (see box) for students with customized resources and learning activities.

“Our students come from different background and have different prior knowledge in certain areas. So we, for example, use the PLD to assign students different types of homework based on their assessment scores. If a student’s score is low on an assessment, we’ll assign them more chapters in a book to brush up on the topics they’re struggling with. The students who score high on an assessment will get a different customized e-mail with less chapters to read, because they have a better knowledge in those areas,” Thomson explains.

This practice helps to engage students more by ensuring that they are learning the skills they need to learn, as opposed to struggling with topics that are too hard or getting bored with subjects they have already mastered.

For Thomson, one of the main reasons for the success of their programs is the flexibility for instructors to control the classroom in whatever method that best suits them. “In the LMS, they can review content at their pace, hide and unhide sections and different assessments and basically be able to customize things as they see fit.”

**Future Challenges**

In the next few years, the company wants to continue adapting to changes in students’ learning styles and find better ways to engage learners.

“Through things like gamification, getting our video library to be potentially more interactive or building more assignments and materials that take place in the LMS versus out of the LMS—we want to be able to make learning more engaging for the students,” says Thomson.

TTS also wants to be able to offer students more immediate feedback and get better data to analyze trends. For example, data analysis can allow instructors to identify at-risk learners and provide early support to those who are struggling.

“I think the biggest trends we see in corporate learning is technology continuing to be incorporated more and more, and people being able to learn at the time and the place they want. So we need to give them resources for that,” says Riddick.

In the LMS, they can review content at their pace, hide and unhide sections and different assessments and basically be able to customize things as they see fit.”

**SOURCE**


ManchesterCF provides financial crime training to help multinational corporations, banks and financial institutions combat money laundering, terrorist financing, proliferation financing, corruption and financial fraud. These timely topics are the focus of the organization’s training programs, which are now available online.

BY: PRISCILA ZIGUNOVAS
TORONTO, CANADA

BASED IN ONTARIO, CANADA, MANCHESTERCF HAS BEEN providing financial intelligence training to organizations in North America, Europe and Asia over the past 12 years. Their courses traditionally relied on face-to-face seminars and printed textbooks, but two years ago, the company decided to migrate all programs to the online environment.

According to Tariq,* head of e-learning at ManchesterCF, while the company was highly regarded by international financial institutions as a training provider, rethinking their training approach was necessary, as they realized the business potential in training underserved financial intelligence professionals.

“The number of trainees has grown exponentially over the past decade and cannot be adequately served through face-to-face seminars anymore. Additionally, the body of knowledge is constantly evolving, and staffs need constant access to the most current information,” notes Tariq.

Understanding Financial Crime Risk Management

Since the beginning of the 21st century, banks around the world have been hit by fines and penalties for facilitating money laundering and terrorist financing, according to Tariq. For some institutions, these penalties may have reached hundreds of millions of dollars. For others, even billions.

“One of the challenges in this area is that the financial crime industry is global. There are unique cultural and economic situations in each market that the financial services organizations are operating in. That means they need to have a great deal of knowledge about the economy, the culture and the politics, and they must use this knowledge appropriately to make their decisions and operate successfully,” says Tariq.

As an example, he notes that certain regions in the world are politically unstable, while others are more open to corruption. “When a bank begins to operate in a region like that, it becomes exposed to those risks, and it has to understand what they are—otherwise, it will be vulnerable to financial crime,” Tariq explains. “The number one challenge is banks having information and being aware, so they can guard themselves against those risks, mitigate them and manage them accordingly.”
Training Programs Strategy

Financial crime risk management is a growing field for financial institutions that’s been getting more attention over the last two decades. Very few educational institutions currently offer training on the subject.

According to Tariq, the area is slowly developing—as regulators, lawmakers and bank employees become aware of how much money laundering and terrorist financing is actually happening through traditional channels, like banks.

Many of the professionals who work as financial investigators learned what they know on the job. However, the body of knowledge is growing, the number of students is growing and ManchesterCF is providing quality training for these professionals.

“What we do is really immersive. We are taking an academic approach because our plan is to fill that gap that currently exists through traditional channels, like banks. However, the body of knowledge is growing, the number of students is growing and ManchesterCF is providing quality training for these professionals.

“In order to train these professionals effectively, ManchesterCF’s strategy is to deliver courses that are well-packaged and interactive. This means selecting the right content and ensuring it is translated for their audience. The courses are designed to be engaging and interactive, while making sure it is current and relevant. ManchesterCF has published 27 modules so far, going up to 33 over 2018. ManchesterCF’s first online client signed up in January 2017. Today, 15 months later, ManchesterCF is in the process of signing thousands of participants from financial institutions, law enforcement, banking regulators and government agencies. ManchesterCF has published 27 modules so far, going up to 33 over 2018. They have experienced dramatic growth in revenue, and the company’s team has doubled in size.

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The Positive Impact of Online Learning

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Some ManchesterCF Courses at a Glance

- **Trade-Based Money Laundering**: One of the first courses developed by the company and also the most popular. Trade-Based Money Laundering offers knowledge on trade finance and how individuals and organizations are exploiting it to commit financial crime.
- **Human Trafficking**: ManchesterCF consulted with a human trafficking survivor who is a subject matter expert to develop this course. It deals with an emerging topic: how financial institutions can play a more active role in identifying human trafficking channels.
- **Critical Thinking for Financial Investigations**: This unique course is mainly for financial analysts. It teaches them how to evaluate information and situations critically, which is a crucial skill for financial investigators.

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Challenges in the Online Migration

Two years ago, when the company first started migrating from face-to-face education to online courses, they were faced with a challenge. They realized that banks, being very conservative organizations, have strict technology policies in terms of information security and privacy.

“When we were going through the digital learning environment selection process, Blackboard Learn was one of the top contenders. But it did better than any of the others because Blackboard really has dispelled the fears of the banks in terms of information security and privacy,” notes Tariq. “When we were going through the digital learning environment selection process, Blackboard Learn was one of the top contenders.”

The second challenge was creating online courses that maintained the engaging and dynamic style of the face-to-face seminars. Due to technology constraints at financial institutions, ManchesterCF couldn’t rely on video, since many students wouldn’t be able to access video in their workplaces.

“It was challenging to take that approach and still keep it interesting and interactive, while making sure it was current and accurate. But Blackboard Learn has enabled us to present our seminar training content as fluid online learning,” says Tariq.

He notes that the course development process is very lean and fluid. “We start with a clear definition of requirements which helps us shape objectives and identify subject matter experts (SMEs) from academia and practitioners. Our research analyst and production editor work actively with the SMEs to develop the content. Then, they fill in the gaps by using sources in the public domain. Graphic, media and instructional designers work in parallel to identify opportunities for creating engaging, interactive rendition of the course material. We believe that active participation from all members of the team helps us create richer content.”

In all courses, students are encouraged to learn through group discussions, wikis and blogs, and share their learning with colleagues. “We like to leverage the social learning aspects and, with these resources, make sure that the users are actively engaged in the process of learning and that they are talking to each other,” says Tariq.

Tariq adds that Blackboard has enabled ManchesterCF to offer testing and reporting capabilities for student testing purposes. “Enabling our clients to extract meaningful metrics is a key component of our value proposition,” he said. “We distinguish ourselves by providing a more rigorous approach in this domain. Providing a diversity of testing options, as well as analytics for gauging performance, helps our clients measure progress and gauge performance.”
Over the past five years, we’ve focused on collaborating with the teaching and learning community by sharing:

- ideas
- perspectives
- insights
- practices

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“Knowing that our students come from different backgrounds and have different prior knowledge in certain areas, we, as an example, use the Moodlerooms PLD to assign students different types of homework based on their assessment scores.”

LMS administrator at Training The Street

Scott Thomson

“Digital learning environment makes L&D programs more intuitive and effective, with tools that engage learners and provide multiple ways to present content and interaction among peers.”

Senior Associate, Prevention at National Alliance of State and Territorial AIDS Directors (NASTAD)

Vrushabh Shah

“Our true learning challenge is to identify these ‘non-certified’ capabilities and skills and teach people to focus on improving in these areas, giving people experiences to learn, and coaching and mentoring people with strong advice on how to improve.”

Principal, Deloitte Consulting LLP, and Founder and editor-in-chief of Bersin

Josh Bersin

Senior Associate, Prevention at National Alliance of State and Territorial AIDS Directors (NASTAD)

Vrushabh Shah