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L&D LESSONS LEARNED

Tagging

Content

Skills

Data

Discovery

Introduction

A few months ago, I shared some of the biggest, most important and most surprising lessons we've gathered over the years in Learning and Development. <u>That post</u> went viral, with many of the industry's great and good joining the conversation.
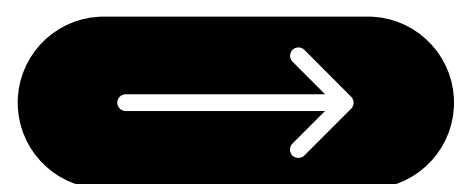
Inspired by that response, I've expanded on each of the five areas I initially identified. This collection now amounts to 80 lessons learned over 15 years—and, more specifically, in the last three years since we invented and launched Content Intelligence.

This booklet isn't meant to be exhaustive; it's a curated set of reflections on these five areas. They were chosen not for their cohesiveness or comprehensiveness, but because each is rich, intriguing, and still somewhat untapped. At Filtered, we believe we've made meaningful contributions in these areas, and by sharing our insights, we hope to advance the industry, spark more discussions, and learn even more from the feedback we receive.

I've sharpened and updated the original LinkedIn lessons, so they're even punchier here. Enjoy!

Marc Zao-Sanders
CEO, Filtered
October, 2024

SKILLS

Definitions

Skills need definitions.

For example, is resilience more about self-awareness or grit?
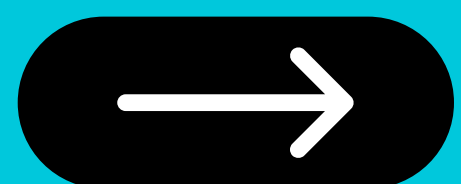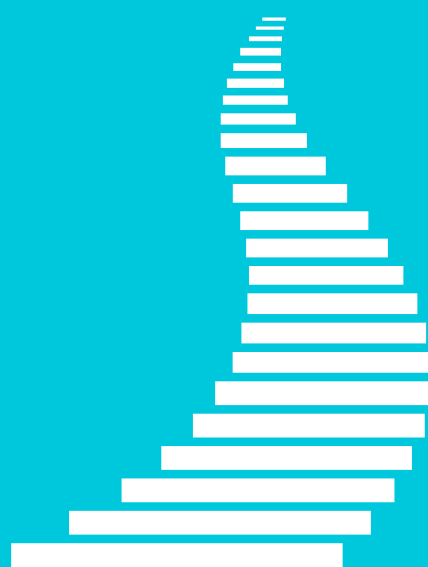
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SKILLS

Levels

Some skills (but not all – this was seized on in the LinkedIn post!) need levels. Levels are often not easy to determine, for learning content or for human beings!

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SKILLS

Scales for levels

Levels can be achieved in multiple ways. Simplistic linear progression (eg 1-5 scale or the FIAT model) is the easiest but also does little to explain what each is.

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SKILLS

Walkie-talkie

The skills-led talk is still a long way ahead of the skills-led walk.

SKILLS

Hot hype

For two years, the two hottest topics in L&D, by far, have been skills and AI. They dominate conferences, content marketing, and sales conversations.

It's not all real and deserved.
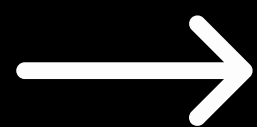
But nor is it all hype.

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SKILLS

More than skills?

What about values, behaviours, knowledge, understanding, competencies, capabilities, attitudes, and mindsets?

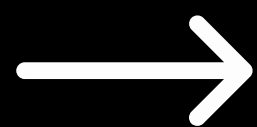Are these *things* less important? How are you catering for them?

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SKILLS

Skills spectrum

Notice the spectrum from:

hard (teachable, testable, 🧠)

soft (harder to teach & test, ❤️)

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SKILLS

Question

Why do you think there's been such a seismic shift to skills over the last few years?

We should all have a view on this.
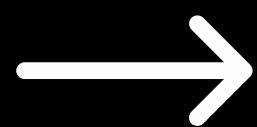
Some ideas in the next few pages...

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SKILLS

Workplace mobility

AKA talent mobility.

Lateral work moves are more common nowadays. So the rigidly defined job role is becoming less useful than the more granular list of skills it consists of.

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SKILLS

Skills gaps

There are reports of companies, industries, and the entire global economy facing talent shortages for certain skills.

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SKILLS

Tech

Technology (eg GenAI) is advancing fast, and people need to adapt to use it.

This means new skills to learn. And that how we create, consume and conceive of content will change rapidly.

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SKILLS

Tech means data

That tech brings lots of data to understand workforces.
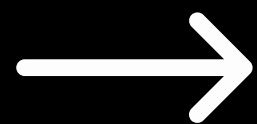
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SKILLS

Employee empowerment

There's been a shift in power from employer to employee, and so the need to attend to and improve the skills of the individual is more keenly felt.

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SKILLS

Skills frameworks, etc

Skills taxonomies, AKA ontologies, frameworks. These are important for corporates to have some influence on and control of the skills development process.
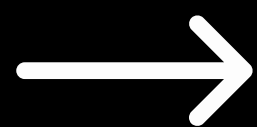
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SKILLS

Average size

The average skills taxonomy at the large companies we at Filtered tend to serve is circa **300**.

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SKILLS

Hurry up!

Companies can take months / years to agree a skills framework.
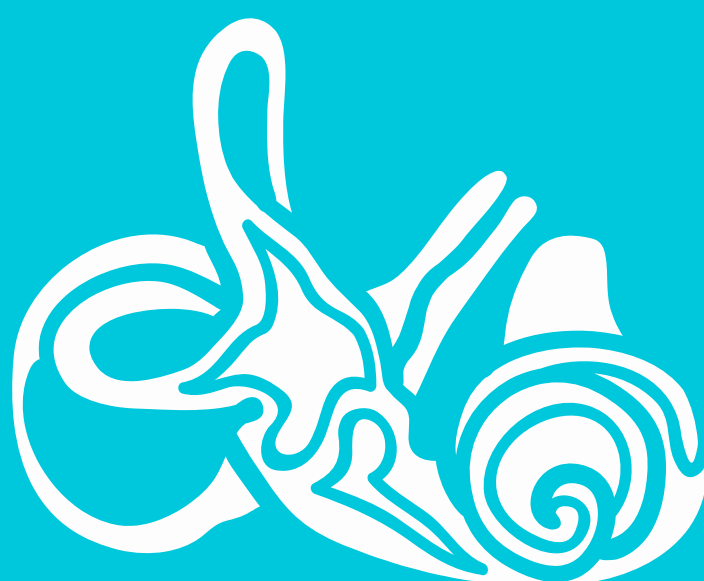
85% of of them are near-identical. You can have something useful, flexible & extensible.

→
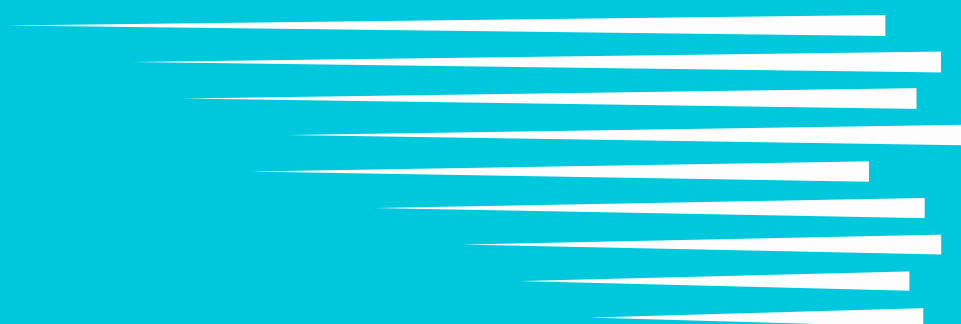
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SKILLS

Be tangible, not vague

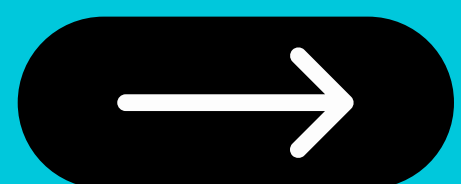When talking about skills, the conversation is 10x richer if you keep a specific, tangible skill in mind.

(I use attentive listening as my go-to).

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SKILLS

100 most common skills

Our post with <u>the 100 most common skills</u> we see went viral on LinkedIn.

Please take a look.

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SKILLS

Emerging skills

There are a handful of important, emerging skills, which get a lot of attention:

GenAI, data literacy, hybrid team leadership, sustainability reporting, data visualisation, wellbeing, influence & brand, sense-making.
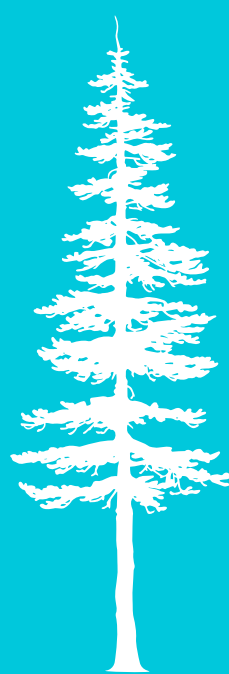
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SKILLS

Evergreen

There's a much longer list of evergreen skills, which tend to get less attention: writing, thinking, empathy, spreadsheeting, project management, strategy.
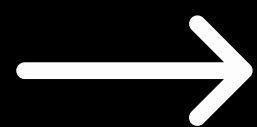
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SKILLS

Half-life

The half-life of a skill is decreasing, apparently.

Do you have a view on this?

Why should it be a half-life?

Is this true for all skills?

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SKILLS

Filling gaps vs building strengths

Filling skills gaps is essential for the business.

But for an individual, a better approach may be to build on **strengths**.

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SKILLS

T-shape

A T-shape (deep expertise in a single area, surface, functional awareness of many others) is a good, sensible, realistic shape for the skills of an individual.

But note that there are others, eg pi, I, comb, and M.
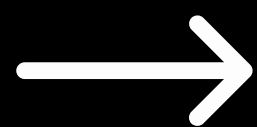
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SKILLS

The most important skill?

There are so many articles claiming that *the most important skill is X*. This is clickbait

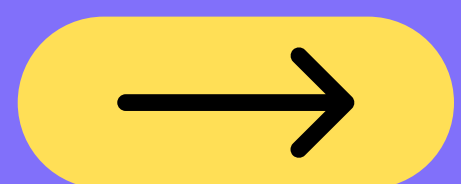Work out what the most important skills are for you or your org, and why. That actually matters.

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TAGGING

Beyond humans

Tagging content with skills is beyond human capacity as soon as you have even 50 skills.

→
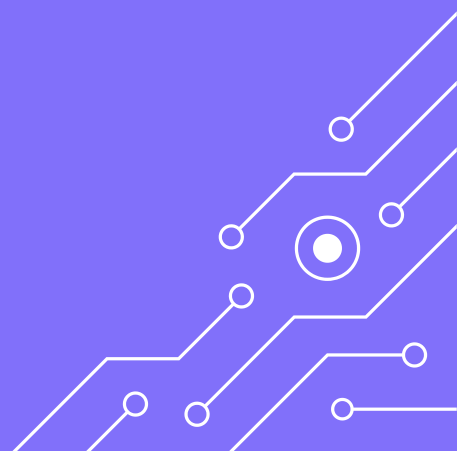
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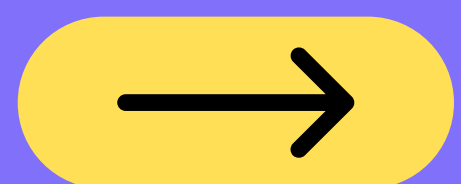## TAGGING

80%

Tagging needs to be at least 80% accurate. That means a human expert would agree 80% of the time. (Note that humans agree with humans only 80% of the time.)

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Metrics

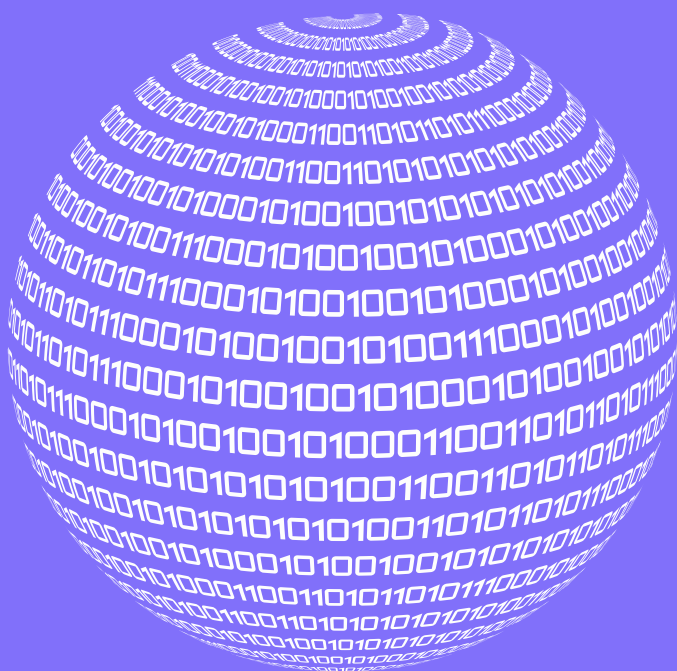You'll need a simple, robust way of measuring and benchmarking accuracy.

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TAGGING

Tagging is binary

Mapping skills to content is overly simplistic because it's binary – either a piece of content is about that skill or it's not
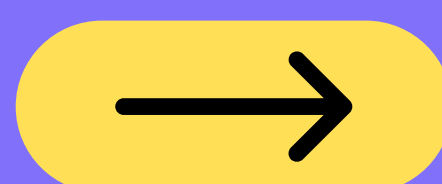
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TAGGING

In reality, most content touches on multiple skills.

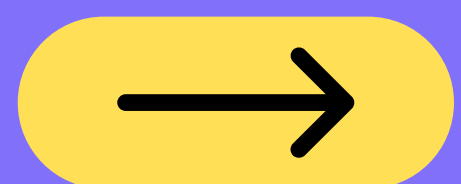In fact, this is true of this very document, and the tags applied to each lesson learned! How meta!

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TAGGING

False +ves, true -ves

False positives and true negatives in tagging need to be understood separately, measured, and solved for.
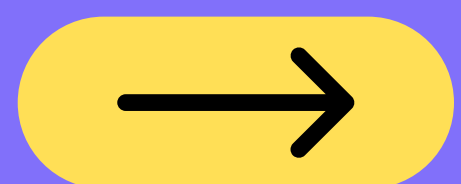
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TAGGING

What is it?

Tagging is the most popular term for explicitly associating a piece of content with certain topics. Next most popular terms (in order): mapping, indexing, classifying, categorising.

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TAGGING

What's the point of it?

To improve discovery, sure. But how? Is it when a user searches for precisely that term? Yes! Or will it help with other search queries too? Yes, it should. Will it help curation? Will it help with end-user personalization? Will it help curators curate better or faster? Yes to all!

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TAGGING

Cont'd...

Think of it this way: there are treasures at the bottom of the ocean of your learning systems. But they're interspersed with huge volumes of detritus. Tagging is a good way to surface them, so they can do some good for your people.
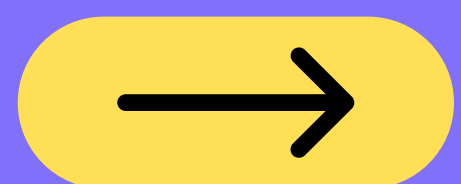
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TAGGING

Cont'd...

Ask yourself these two related questions too:

↳ How much will it improve discovery?
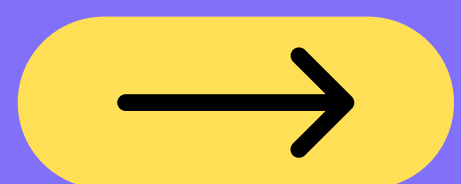↳ Do you have a measure for the efficacy of your discovery?

→

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TAGGING

Title + description

These two fields are collectively sufficient to accurately tag in most cases. Of course, both will need to be reasonably representative of the full learning content.
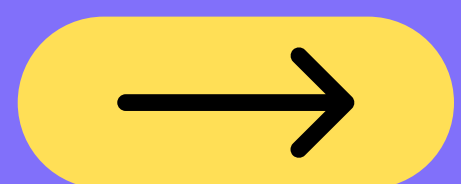
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TAGGING

Just imagine...

In L&D, we're unimaginative about tags. We just tag content with skills. But what about whether it's instructive/informative/inspiring? Or perishable/evergreen? Or whether it will work well for teams? Or...

→

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TAGGING

Search instead? 🔍

Ultimately, great search can bypass rigid tags. If search starts to work better, user behaviour starts to change—people will chance more adventurous, obscure search terms. Your learning system should learn from this and improve. Users will engage even more...

→

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TAGGING

Ranked scoring

Ranked scoring can also beat tags. Tags say that a piece of content is *about* active listening, DEI, leadership, etc, or that it is *not*.

The world is much more nuanced than that.

→
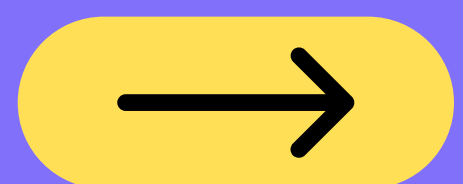
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TAGGING

Curators going down a list...

Scores enable a learner or L&D practitioner to go through a list of content, in order, from top to bottom, to decide how to treat it. This prioritisation matters.
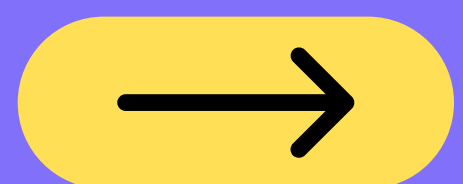
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TAGGING

Blessed are the sense-makers

Sense-making is an underrated skill and an under-applied tag.

Do you have this as a skill in your taxonomy?

→

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TAGGING

Sometimes tagging won't work

Sometimes, improving your tags won't even improve discovery. If your learning system can't accommodate enhanced tags into its UX and search results, you may have perfect tags, yet not helped a single user!

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TAGGING

Your tags, noone else's

Your / your org's tags are 100% more important than those of any vendor (content vendor, taxonomy vendor, learning system vendor).

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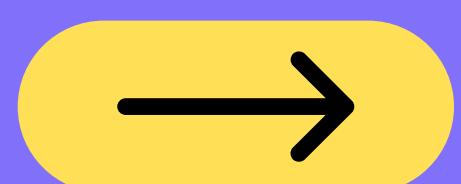
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TAGGING

Try this...

This may require a double-take, but try this:

Tagging attaches skills to content.

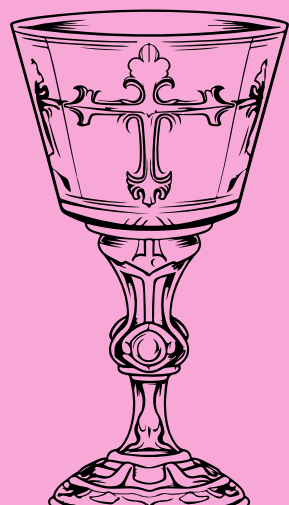Curation attaches content to skills.

→
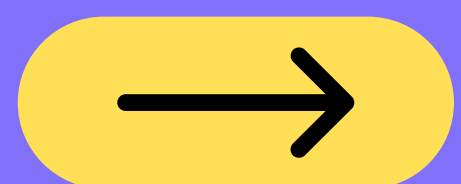
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CONTENT

Content quality

There are just a few content vendors that have quality-of-content data, and even fewer buyers who know who they are.

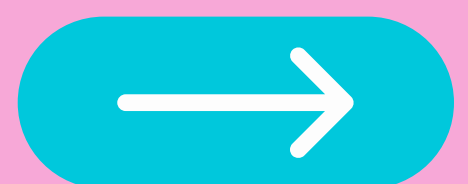This is still a holy grail for L&D.

→
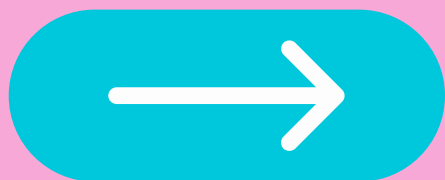
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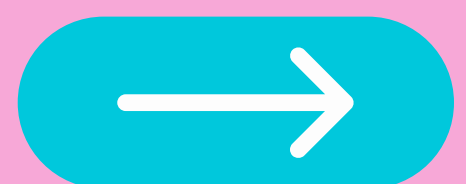# Rationalise

Few companies, even Fortune 500s, need more than a couple of large libraries.

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Harmony

Being on good terms with the various content providers is not essential but highly desirable.

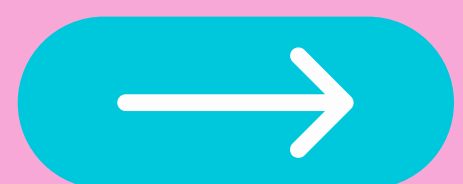We're happy to be on such terms with most of them. 😊

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CONTENT

Content audit

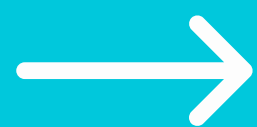A content audit that doesn't consider internal content is just an incomplete piece of work.
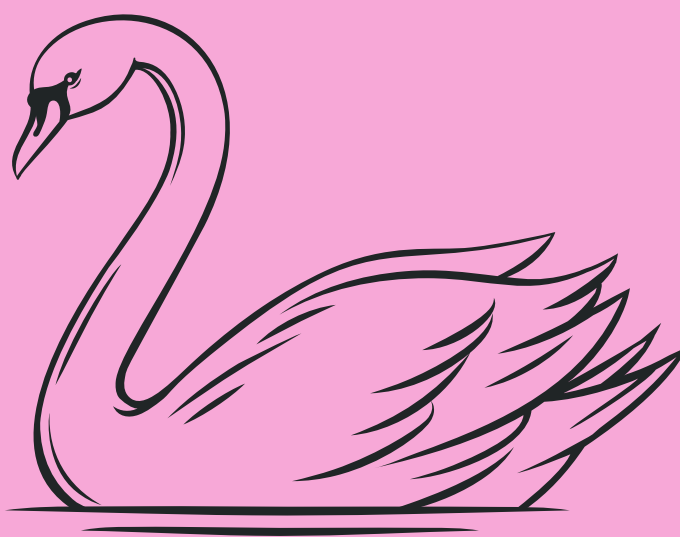
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CONTENT

Ugly duckling

Content gets relatively little attention from HR and L&D. The side of skills that gets the attention is talent. And yet, a) it's a $100 billion industry, and b) the world just went crazy about content, thanks to GenAI.
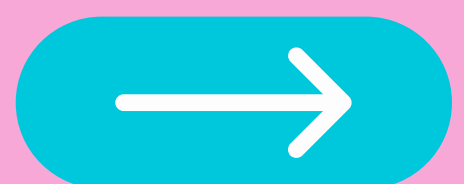
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CONTENT

Categories

- General-purpose eg HBR
- Format-specific eg TED
- Marketplaces eg Udemy
- Aggregators eg Go1
- MOOCs: Coursera, Udacity
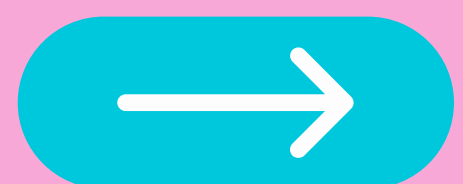- Specialists: Pluralsight
- Web
- Internal

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CONTENT

Too generic

The #1 complaint about content is that it's too generic to be helpful.
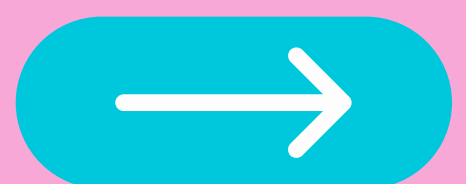
Do you have an answer to that?

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The big ones

The main libraries that we hear of the most are (deliberately unordered): O'Reilly, Udemy, Coursera, LinkedIn Learning, Skillsoft, Pluralsight, edX, HBP, TED@Work, Go1, OpenSesame, Cegos, Udacity, and getAbstract.
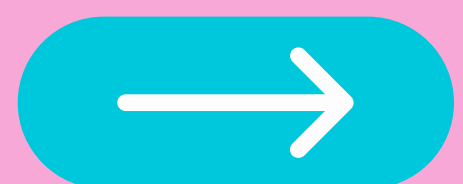
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Cont'd...

But having given them all an advertisement, we should say that topic-wise, there's massive overlap among these, and some can be very expensive (seven figures per year).
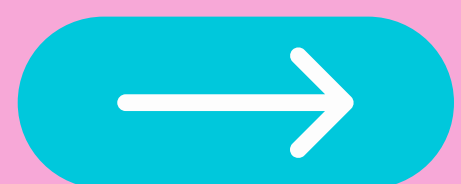
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CONTENT

Skillsoft vs LinkedIn Learning

For large companies, the fastest way to reduce costs is to determine the overlap between two large providers and pick one.

We often see this come down to Skillsoft vs. LinkedIn.

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CONTENT

Niche providers

You can only really go for these if/when you *know* you've got all the main skill bases covered. Do that first with a larger library, then start shopping like an artisan. There's more love and care among some of these.
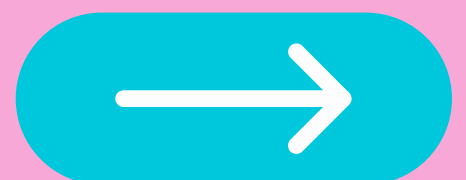
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CONTENT

Vendor selection

You're not looking for the vendor with the best fit for your skills. You're looking for the **best combination** of vendors to give you the skills and topics coverage you need.
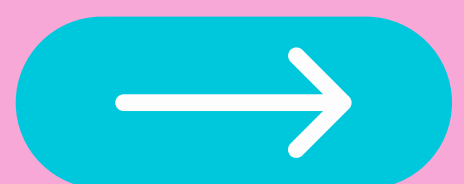
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CONTENT

Costs

The range between providers is huge. The per-license cost between small and large is huge. The difference between pre-negotiated and hard-negotiated rates is huge.
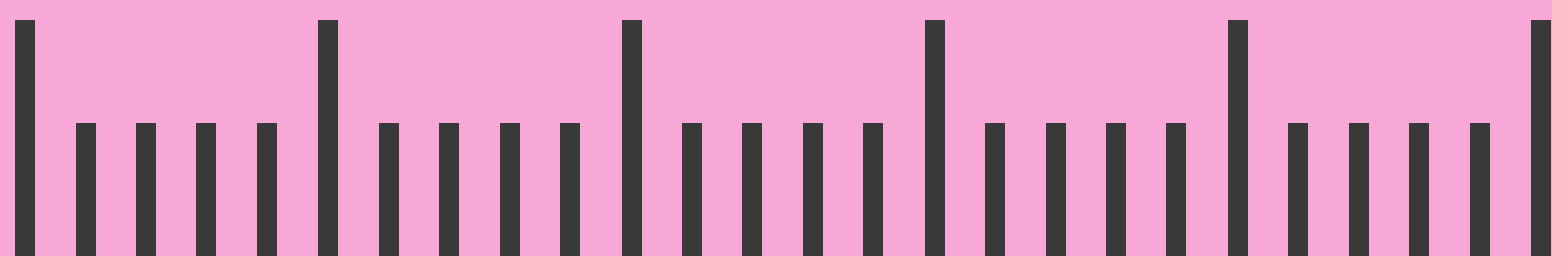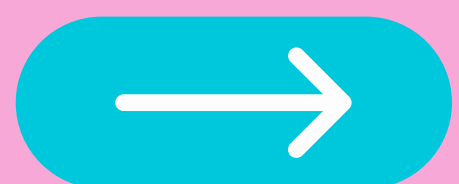
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CONTENT

Metrics for content

Easy metrics for assessing content include language, duration, publication date, format, etc. The two most talked about are relevance and quality. Relevance, which is essential and our focus, is greatly desired and hotly debated.
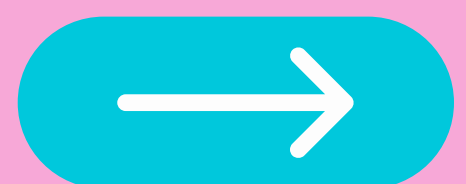
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CONTENT

Being up to date with trends

Some content needs to get out there fast, or it becomes obsolete. We saw this with the speed at which prompt engineering became suddenly hot and then suddenly cold.
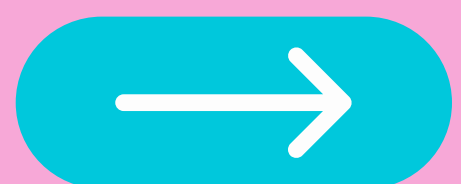
GenAI may solve this one day...

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CONTENT

Stay ahead of the curve

Careful curation of web content is the best bet for now.

Creating content yourself or expecting vendors to do so quickly enough to stay ahead is often unrealistic.
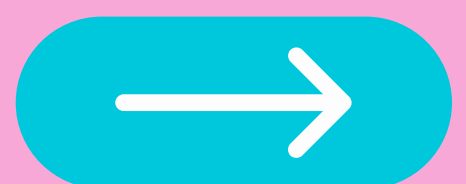
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CONTENT

Context

Content isn't just what you buy or make. Some context about your company can frame it usefully. For example, asking, *'Why is this article important for our industry?'* before the learner reads it turns it into a different beast, instantly.
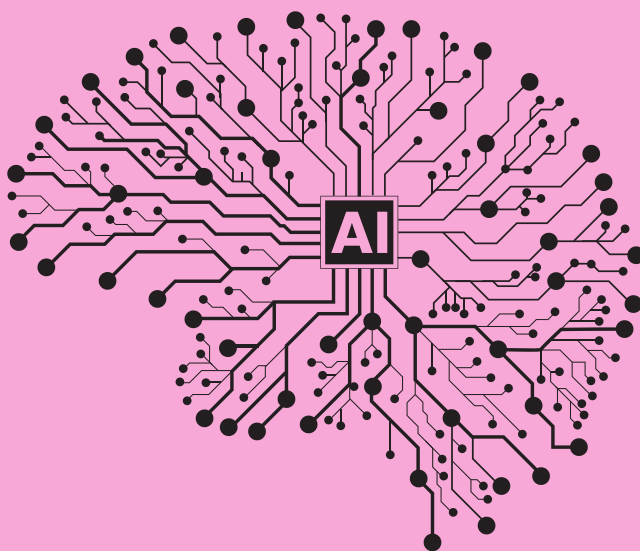
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AI-generated content

AI-generated content is unlikely to replace learning content anytime soon due to trust issues, strict IT policies, perceived quality, hallucinations, and a lack of deep expertise where little training data is available.
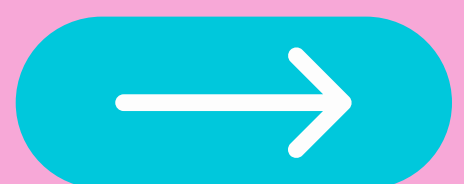
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CONTENT

Hyper-personalized

Hyper-personalized content will be a big part of the future, but it won't be everything, as humans still like and need to learn together in many contexts.
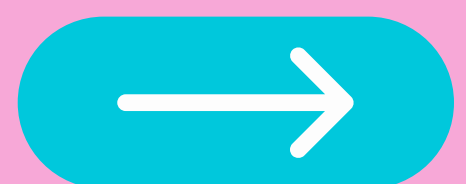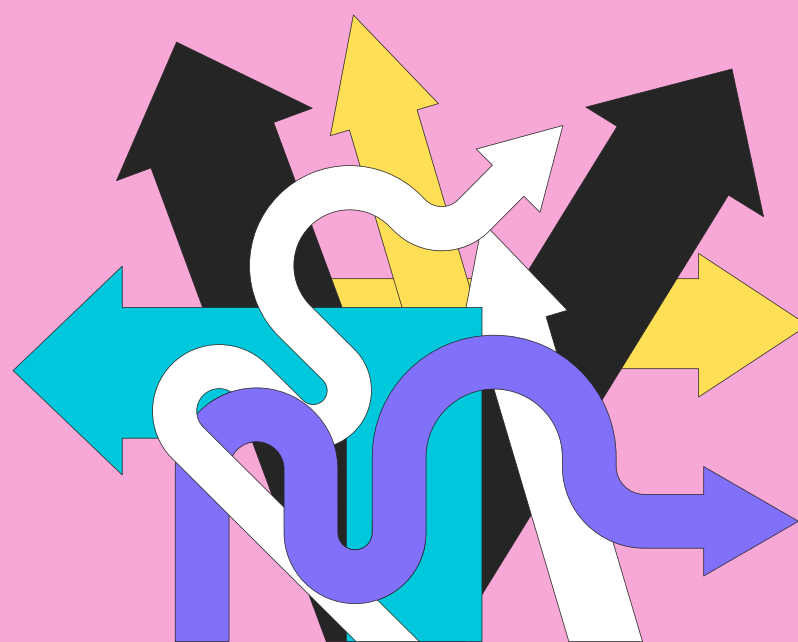
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CONTENT

Pathways are often a mess

Many large companies we work with have thousands of pathways on top of tens or hundreds of thousands of learning assets. Pathway chaos is a subset of content chaos, and it doesn't help anyone.
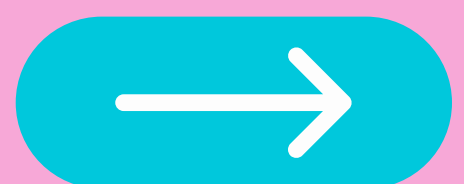
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CONTENT

Quality

Quality is hard to achieve and rare. Many factors go into making a piece of content valuable to someone, and much (but not all!) of this is context-dependent—i.e., what it will do for that person at that time.
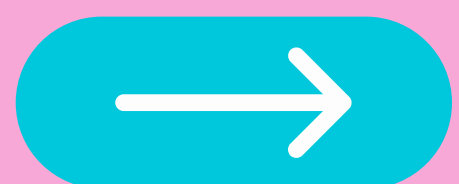
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CONTENT

Consumer-grade

'Consumer grade' has been a glibly touted phrase since the advent of the LXP. But very little learning content truly meets this standard.

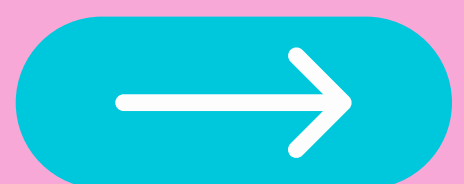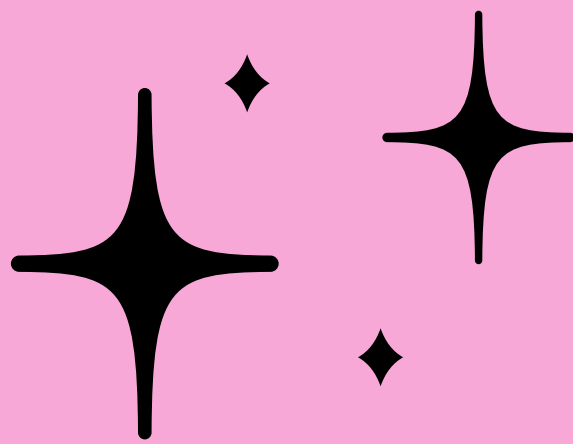Think of this as the 'do-your-friends-use-it?' standard.

→

filtered

CONTENT

Magic

Once in a blue moon, content can be magical.

Please take a look at this.
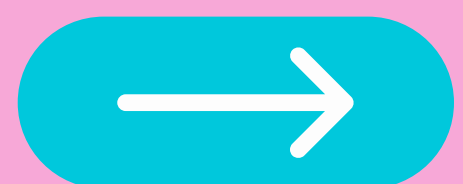
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CONTENT

Another question

'How much content do you need for a particular skill or topic?' is a question most clients agree is a good one, but few have an answer to.
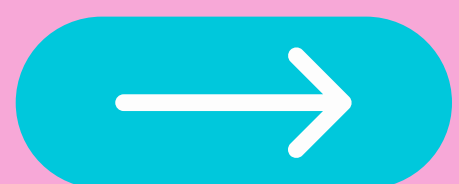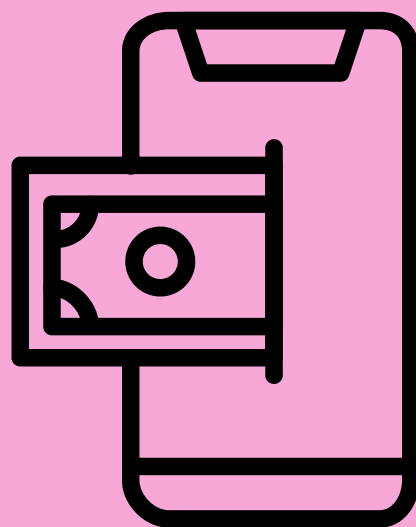
filtered

CONTENT

Pay As You Go

There's a glacial shift towards a PAYG model of content buying. It's glacial because although buyers want it, vendors (in general) do not. But the all-you-can-eat model (just like in restaurants) is not good for the quality and long-lasting impact of the experience!
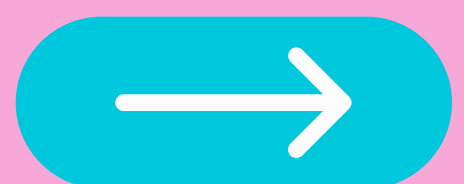
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CONTENT

Further fields & filters

There are many overlooked aspects of content: industry, business function, durability, gender-relatedness, creator ethnicity, depth, geography, controversy, accessibility. Get in touch for an elaboration on any of these.

→

filtered

DISCOVERY

Why?

Discovery is an issue because of the sheer, stupefying abundance of content.

filtered

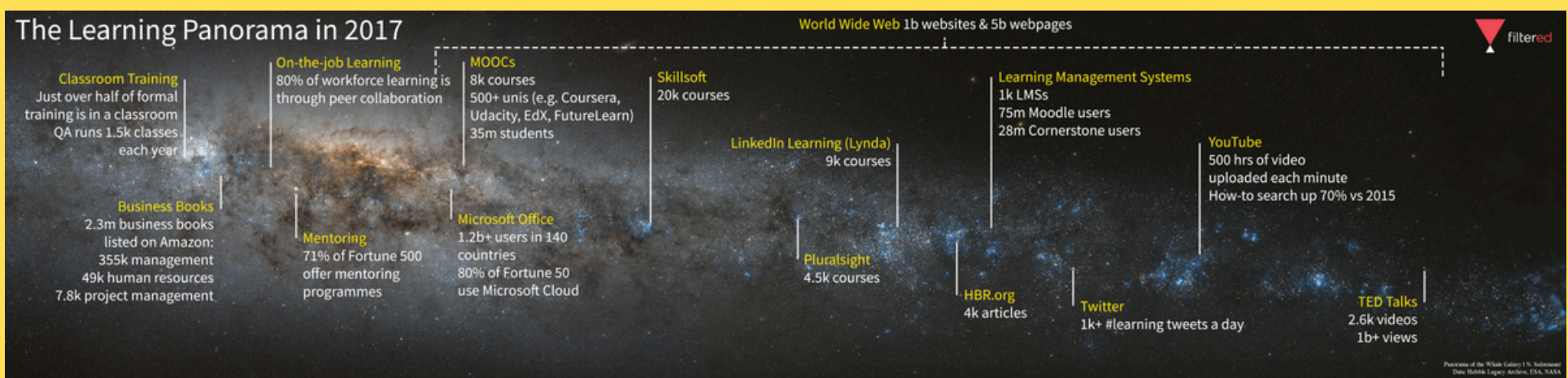# What we said 7 years ago

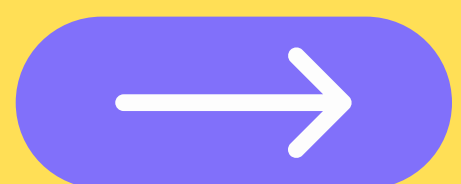We created this Learning Panorama graphic back in 2017.

Zoom in!

filtered

DISCOVERY

Chaos

We now call the problem Content Chaos.

It's grown and grown over the last few years.

filtered

DISCOVERY

Definition

Discovery is the process through which employees or learners efficiently find, access, and engage with relevant learning content & experiences that support their skills development, job performance & career growth.

→

filtered

DISCOVERY

Measuring discovery

It's not easy. Possibilities include:

- Search success rate
- Time to start learning
- Usage of assets
- Usage of suggested assets
- # complaints from business
- Feedback surveys
- Pathway adoption

filtered

DISCOVERY

2 chief complaints

1. We can't find anything
2. There are far too many results (project management often come up).

A different set of problems (and solutions) lurk behind each!

→

filtered

DISCOVERY

Solutions

Many types of solutions/features can improve discovery: search, filters, sorts, browse, pathways, recommendations.

You won't need them all. But it's worth being aware of them all, and their weaknesses/strengths.

filtered

DISCOVERY

Push-pull spectrum

There's a pull-push spectrum with these, from greatest user intention (eg search, where there's an explicit term in mind) to least (eg recommendations, where the user may have no learning intention at all).

→

filtered

DISCOVERY

A framework for discovery

There's a framework for thinking about discovery – from Rosemary Hoskins – and published in CLO magazine (Google it).

filtered

DISCOVERY

Discovery at source

That framework makes the point that discovery starts **at source** — having the right materials in the first place — and then gets to the signposting (tagging, pathways, personalised recommendations) that happens **downstream**.
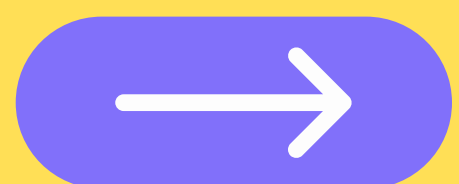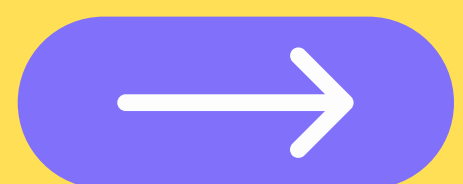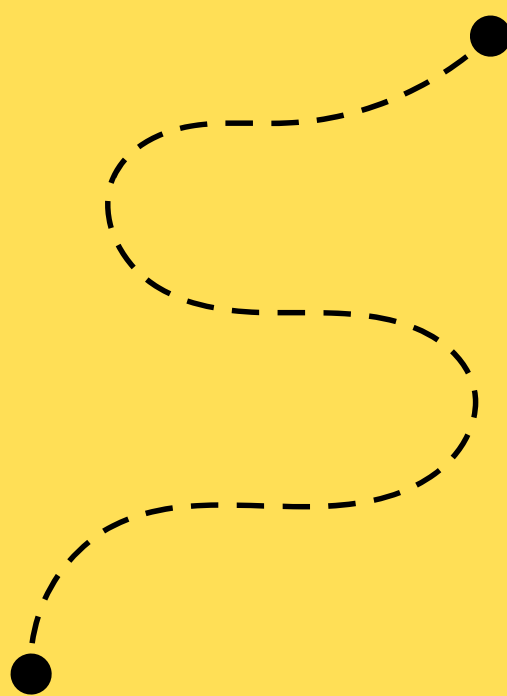
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DISCOVERY

Learning pathways lift out special, fit-for-a-particular-purpose assets, from the sea of content, to give them a prominence to certain audiences.

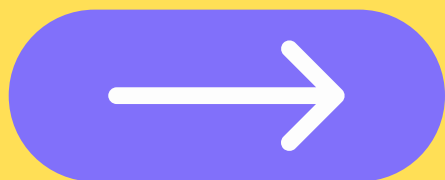Done well, they inspire and move careers forward.

filtered

DISCOVERY

Search terms

The most popular search terms are very similar at all companies! Agile, Excel, project mgmt, time management and Excel always make the top 10. The top-10 searches account for 30% of all searches. So, make the search results for your top-10 amazing.

filtered

DISCOVERY

The role of AI in all this

Even with all the recent developments, AI won't fully grasp business context, nor all the specific needs and curiosities of individuals.

Use AI for what it's good at but humans are still required for the last mile.

→

filtered

Follow my leader

Senior people should lead by example and talk openly about what they've learnt & how it's been useful for them.

Managers need to be on the look-out for useful learning content for the people in their teams.
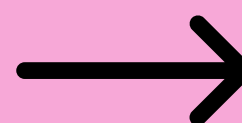
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filtered

DATA

Different providers

Different content providers describe their content differently from each other. This needs to be taken into account, somehow.
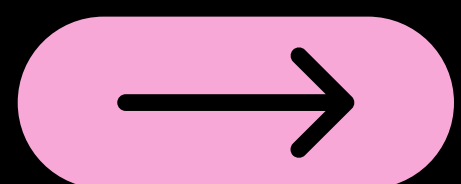
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Which taxonomy?

The taxonomy of the client is most of what matters, certainly for enterprise.
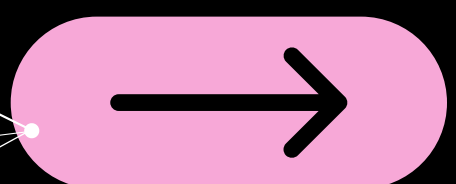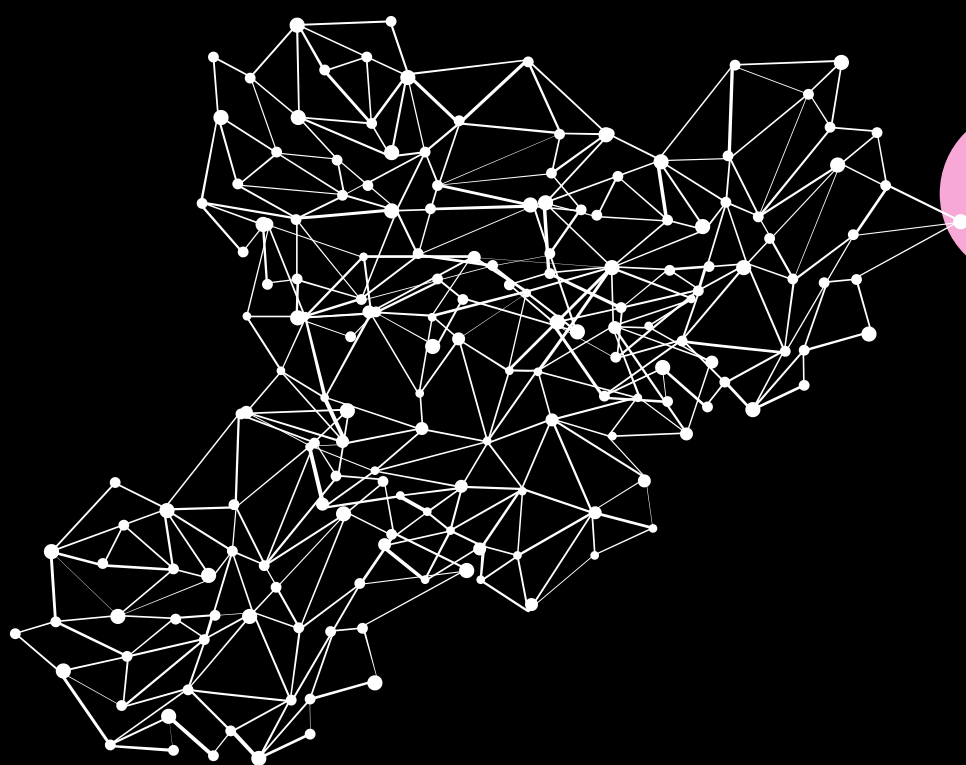
Generic taxonomies often work for smaller companies.

filtered

DATA

Data wins arguments

Yet L&D often doesn't win internal arguments. So there's lots for L&D to do here.

More specifically, we see companies that have been spending six or seven figures on content for a while but are not confident enough to instigate major change.
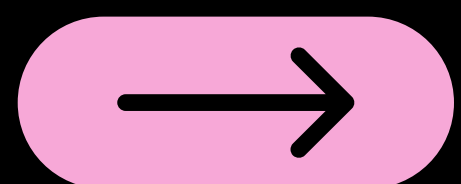
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Cont'd

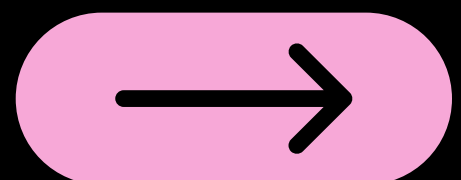But the right data provides the business and the confidence and the voice.

And the change.

filtered

DATA

Foundation for AI

People are talking a lot about AI. If you have plans for AI for your use case, you will need the right data foundations.
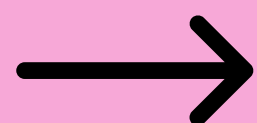
Garbage in, garbage out.

filtered

DATA

Many kinds of wrong data

There are many issues with data and recognising them is much of the cure. Data can be: unstructured, unrepresentative, incorrect, missing, corrupted, out-of-date, biased, duplicated, irrelevant, misleading.
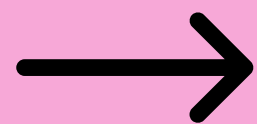
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DATA

Per-asset data

There is very little data when you break things down to the per-asset level. The majority of the learning assets on any corporate learning system are not touched at all. People don't consume learning content like they consume YouTube or Spotify content.

filtered

DATA

Cont'd

Furthermore, content data is pooled on those massive platforms whereas in the corporate world we have these allied gardens between each corporate fiefdom.
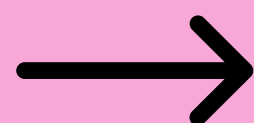
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DATA

Cont'd

There's no Rotten Tomatoes or IMDB of learning content, where our collective usage and experience data is shared and from which reliable, data-rich insights can be drawn.
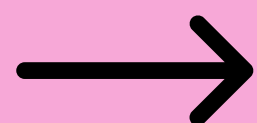
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DATA

Specialists vs everyone else

There's often confusion between data for specialists (data science, data analytics, data warehousing, data visualisation, etc.) and data for everyone (data literacy). L&D curators need to cater to both, and the job differs significantly for each case.
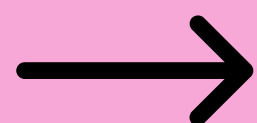
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Cont'd

Josh Bersin and I wrote <u>a HBR piece on data literacy</u>.

Some research suggests that data literacy will be the most in-demand skill soon (admittedly, there is research to assert this claim about many skills).
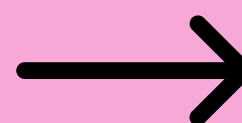
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DATA

Metadata

This is confused too. Metadata is simply data about the data. So if the data is the content, the metadata is some of the fields like duration, language, publication date, etc.
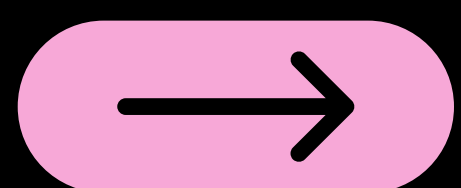
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Cont'd

Some of this metadata ships with the content. Some come with the content but need to be standardised. And some don't come with the content at all, and need to be generated (such as our relevance scores).
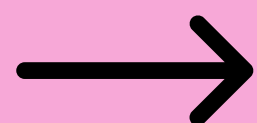
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DATA

Data / datum

The singular and plural forms also confuse people. It is confusing. The term 'data' can be either singular or plural, depending on context and meaning.

→

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DATA

Cont'd

Typically, 'data' is considered singular when used as a mass noun referring to 'information,' and plural when referring to individual **facts**.
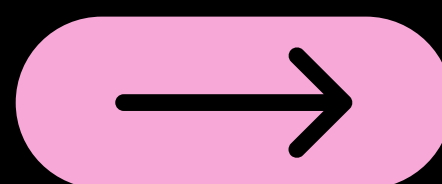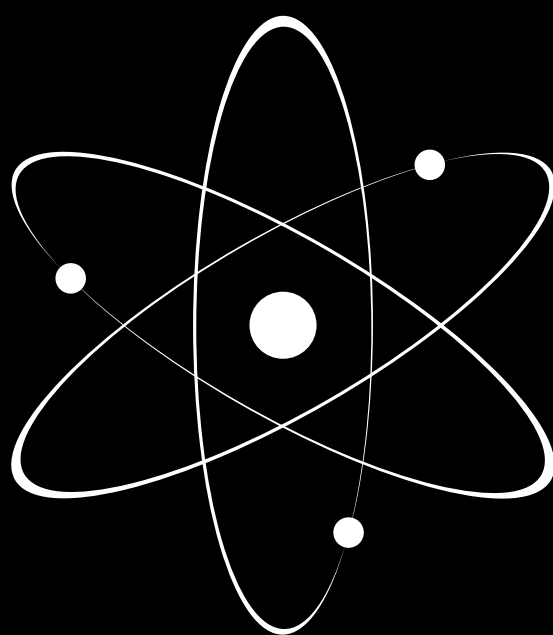
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Cont'd

In scientific and academic writing, it is almost always treated as a plural noun.

Knowing how to use the term correctly is important because it helps to establish gravitas (or not lose it) in business discussions.
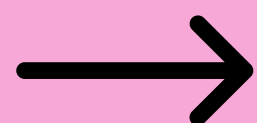
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DATA

Learning hours 😱

Simultaneously vilified yet widely used by L&D to establish ROI, business cases, value etc. This usage vs impact debate just won't go away. Of course we want impact data.
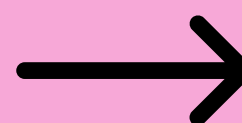
filtered

Cont'd

But causal impact data is much harder to acquire as you move further away from the learning event. So you need to look at a sensibly weighted combination.

Discussed with passion here.

filtered

Thank you...

...for sticking with this til the end.

Mark complete ☐

filtered