A Blended Approach to Optimizing the Learning Journey for Soft Skills Mastery

Dale Carnegie

Digital Transformation and Learning and Development

It seems that digital transformation is touching nearly everything. From operations to IT, marketing and human resources, new technologies are being developed every day that are changing how people work. C-suite executives are looking to digital transformation for cost savings, increased productivity and the innovation required to stay relevant in a hyper-competitive marketplace, and crises such as Covid-19 are only increasing the urgency.

The Learning and Development (L&D) function is no exception to the digital trend; new technologies are revolutionizing how and when people learn. But while L&D technologies driven by artificial intelligence (AI), virtual and augmented reality and mobile applications are advancing every day, many professionals and practitioners are struggling to make sense of when to leverage these new modalities. There is little research defining the ideal blend, leaving L&D teams without clear recommendations on when digital or traditional face-to-face training should be used, where along the learning journey and for what type of content. In light of this, we interviewed a number of L&D experts to gather their experience, insights and opinions about whether we can and should be moving the learner journey to digital platforms when developing soft skills is the objective.

In this paper we seek to address this question and, based on those interviews as well as our research and experience, establish guidance and best practices regarding an appropriate blended learning journey that considers both the type of training and the phases of the learner's journey. Given the lack of authoritative, independent research and the multitude of opinions that exist on the subject, we recognize that there is no one-size-fits-all approach. Nonetheless, we present below what we believe to be an effective learning delivery framework, what we call the Performance Change Pathway™, which, through awareness, experience and sustainment, reinforces the development of skills and habits learners need in order to apply and sustain performance change. Before detailing a blended training delivery model, we first address the demand in the marketplace from the perspective of those responsible for developing people as well as the people they are developing.

Organizational Needs for Talent Development

Widespread digitial transformation and the impact of VUCA (volatility, uncertainty, complexity and ambiguity) are requiring dramatic upskilling and reskilling of the workforce, and leaders are concerned about the resulting skills gap. A World Economic Forum study recently found that by 2022, 42% of core skills required to perform existing jobs are expected to change.[1] The burden of addressing this mismatch is falling directly on L&D teams. According to *LinkedIn Learning*, in 2019, the number one focus of talent teams was to identify, assess and close skills gaps — up 32% year-over-year.[2]

> *"50% of senior leaders believe that their talent development efforts don't adequately build critical skills and organizational capabilities."*
>
> *-Harvard Business Review*

Several large-scale industry studies, along with our own in-depth interviews with clients, indicate that a significant number of senior leaders — up to half — believe that their talent development efforts don't adequately build critical skills and organizational capabilities they need.[3]

Skill gaps encompass both hard, technology (STEM) skills as well as what have traditionally been called soft skills: the social and emotional intelligence people need to lead and work together to accomplish

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[1] We need a global reskilling revolution–here's why. https://www.weforum.org/agenda/2020/01/reskilling-revolution-jobs-future-skills/
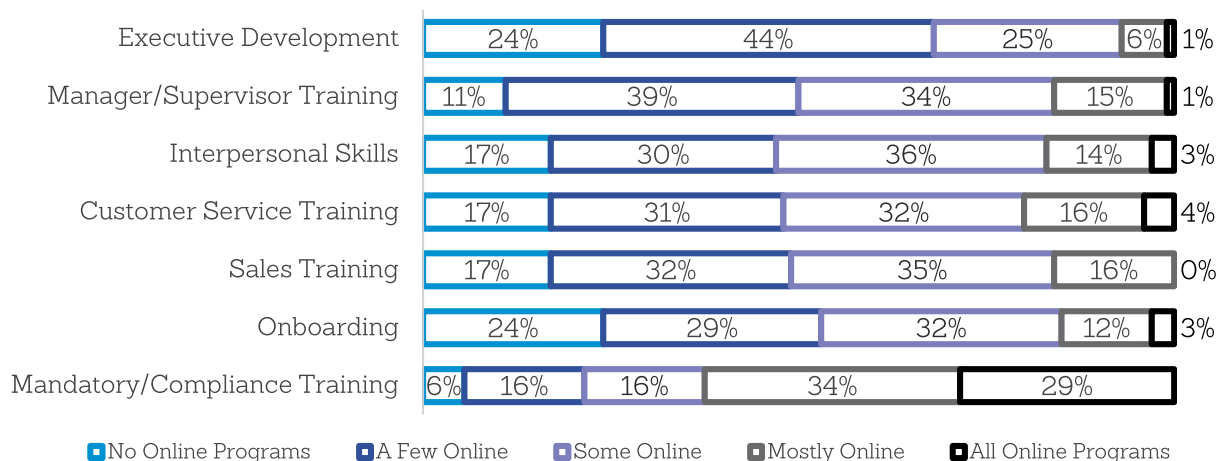[2] "3rd Annual 2019 Workplace Learning Report," *Learning LinkedIn*, 2019
[3] "Educating the Next Generation of Leaders," *Harvard Business Review,* March-April 2019

goals. As many organizations are now realizing that they can hire and build technical skills relatively easily, L&D professionals are turning their focus to soft skills.

In fact, soft skills surface in many recent studies as a top priority for organizational leaders and L&D teams.[4] Deloitte Access Economics forecasts that "soft skill-intensive occupations will account for two-thirds of all jobs by 2030."[5] *LinkedIn Learning* ranks creativity as the single most in-demand skill for companies to develop in their employees, followed by problem solving, critical thinking and emotional intelligence.[6,7] Our own data largely agrees: In a 2019 survey conducted by Dale Carnegie Training on which skills will be needed as more employees work alongside AI, nearly seven in 10 VP-level and above respondents identified communications skills as particularly important, followed by creativity, critical thinking, leaderships skills and teamwork.[8] The *Association of Talent Development* (*ATD)* reported that two of the top three content areas with the largest share of the learning portfolio in 2018 were managerial/supervisory (14%) and interpersonal skill development (10%), which both include significant emphasis on soft skills. Data from ATD also show that demand for these skills is growing, with 66% of organizations experiencing a gap in this area since these skills are often neither prioritized nor taught consistently in traditional education environments.[9]

From a delivery standpoint, ATD notes that ACCEL skills (accountability, collaboration, communication, engagement, listening/assessing) are far more likely to be taught in a traditional classroom.[10] It's not surprising then that, according to a study by *Training* magazine (2019), most soft skills-intensive programs, including executive development, management training and interpersonal skills, are delivered with few or no online components.[11] The face-to-face environment continues to be favored by talent developers for providing training in these skill areas.

Online Method for Types of Training

Type of Training	No Online Programs	A Few Online	Some Online	Mostly Online	All Online Programs
Executive Development	24%	44%	25%	6%	1%
Manager/Supervisor Training	11%	39%	34%	15%	1%
Interpersonal Skills	17%	30%	36%	14%	3%
Customer Service Training	17%	31%	32%	16%	4%
Sales Training	17%	32%	35%	16%	0%
Onboarding	24%	29%	32%	12%	3%
Mandatory/Compliance Training	6%	16%	16%	34%	29%

Source: Training Mag.com, 2019

[4] "Educating the Next Generation of Leaders," *Harvard Business Review,* March-April 2019
[5] "Soft skills for business success," *Deloitte. Access Economics*, May 2017
[6] "The Sad State of Soft Skills and How L&D Can Fit it" *Media Partners*, June 26, 2018
[7] "3rd Annual 2019 Workplace Learning Report," *Learning LinkedIn*, 2019
[8] "Beyond Technology: Preparing People for Success in the Era of AI", Dale Carnegie Training, 2019
[9] "2019 State of the Industry Talent Development Benchmarks and Trends," Association for Talent Development, 2019
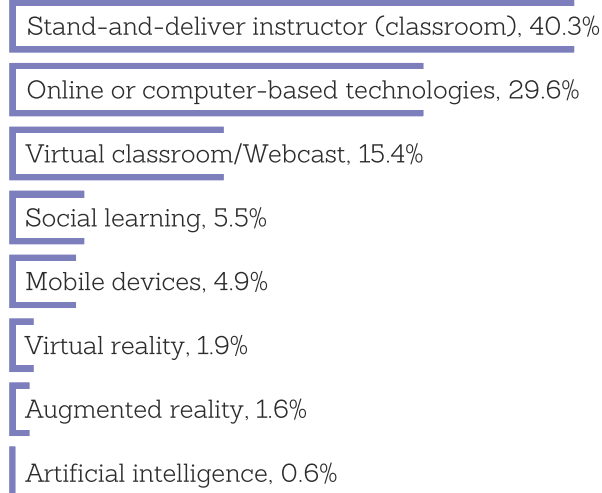[10] "ACCEL: The Skills That Make A Winning Manager," Association for Talent Development, 2016
[11] 2019 Training Industry Report, TrainingMag.com, November/December 2019

But time and money are important considerations for most training departments and leaders, and classroom, instructor-led training is often more costly and requires taking people out of their jobs to come together in a classroom. So, while classroom training is still predominant, particularly for soft skills content, the demand for blended solutions including various digital formats is growing rapidly. Clearly, Covid-19 has accelerated that trend, given the additional need to respect social distancing.

In 2019, around 40% of all training hours were conducted by a stand-and-deliver instructor in a classroom setting. Even so, nearly 60% of training hours incorporated some digital component, such as virtual classroom or webcast, mobile devices or social learning, according to TrainingMag.com.[12]

Training Delivery Methods
% of training hours in 2019

Stand-and-deliver instructor (classroom), 40.3%

Online or computer-based technologies, 29.6%

Virtual classroom/Webcast, 15.4%

Social learning, 5.5%

Mobile devices, 4.9%

Virtual reality, 1.9%

Augmented reality, 1.6%

Artificial intelligence, 0.6%

Source: Training Mag.com, 2019

Many of the emerging methods of digital training promise cost-effective alternatives to traditional training. For example, virtual and augmented reality training platforms offer learners an opportunity to experience workplace scenarios and role-playing across a variety of functions, including sales, customer service and those involving mechanical tasks. VR and AR as well as mobile applications are increasingly relying on AI that can contextualize the content for learners by making recommendations based on individual preferences and needs, moving closer to true adaptive learning. According to ATD, these platforms also rely on cloud technologies, aggregating technology and services resulting in content decentralization, on-demand access to information stored on remote servers, and big data that can now be leveraged to gain more insight into employees' learning outcomes.

Yet there are some practical limitations to many digital modalities when utilized without the support of an in-person facilitator.[13] For example, the cost effectiveness of virtual training programs for some types of training may be over-estimated if they fail to fully engage learners: Anonymity can result in passive or disingenuous participation. If employees aren't fully engaged, retention suffers, resulting in a need to re-train, which increases the costs. Nevertheless, these types of developments provide L&D professionals important options to consider.

Needs of the Modern Learner

But addressing the soft skills gap and cost/time savings are not the only concerns for talent developers. The needs and behaviors of learners across all generations have also changed. For most, time is

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[12] "2019 Training Industry Report," *TrainingMag.com*, November/December 2019
[13] "6 Reasons Why Face-To-Face Training Must Stay," *Association for Talent Development*, March 25, 2019; "Why Instructor-Led Training is More Critical Than Ever in Our Distraction-Heavy World," *Global Knowledge*, June 14, 2019; IDC, 2019 IT Training Buyer Survey Spotlight: Impact of Skills Gap and the Need for Strategic IT Skills Development, Doc #US44842319, March 2019; "Face-To-Face Training Is Still the Better Choice Over Digital Lessons," *Association for Talent Development*, September 2014; "Blended Learning Is Better than Instructor-led or Online Learning Alone," *Association for Talent Development*, July 16, 2012; "Online vs. In-Class Success," *Training Mag.com*, accessed December 2019

limited, attention spans are short, and people have strong preferences for when, where and on what device they learn.

Many employees are not content to sit for long periods in a classroom — or even at their computer — listening to or reading dense training materials. In the absence of a highly engaging learner experience, the temptation to multi-task instead of focusing entirely on the training can be high.

Employees are also seeking social interaction in their learning experiences. More than half of each generation in a recent *LinkedIn Learning* study said they value the ability to collaborate with instructors and other learners via forums, groups or Q&A sessions. Millennials and Generation Z workers, in particular, say connecting with colleagues is important to them.[14]

Percent of Employees that Value the Ability to Collaborate with Instructors or Other Learners

Gen Z — 63%
Millennial — 72%
Gen X — 59%
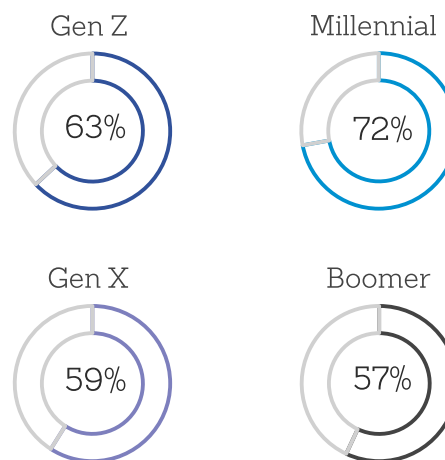Boomer — 57%

Source: LinkedIn Learning, 2019

Across all generations, employees want access to learning content throughout their day, whether that's on their commute to or from work, at their desk or during a break. They also value being able to access it at the moments they need it most — e.g., before a presentation, a sales call or a team meeting. This type of physical learning journey requires a complex blend of digital delivery with just-in-time access across multiple devices (mobile, laptop, etc.).

At the same time, a 2018 survey by a cloud-based learning platform reported that out of nine possible learning methods, instructor-led training (ILT), short-clip video and coaching and mentoring were the top three learning approaches preferred by respondents, with even younger workers rating live ILT among their top preferences.[15]

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> *-Patricia Franklin*
> *Learning-Product Design and Development Professional*

L&D teams are trying to work out how to best accommodate these preferences and needs while still ensuring the training effectively engages learners and delivers desired outcomes. After all, as one of the Learning-Product Design and Development Professionals we interviewed said, "If you can't engage learners, there's no point in going through the trouble of creating a learning program. If people aren't engaged, that means that they're not learning and they're certainly not going to retain the information that they need to."[16]

Perhaps one of the biggest challenges to using digital learning modalities exclusively is the difficulty in effectively engaging learners' emotions.

Emotions are integral to the learning process; they can either enable or inhibit learning. Extensive research is

[14] "3rd Annual 2019 Workplace Learning Report," *LinkedIn Learning*, 2019
[15] "New Survey Reveals That Workers Rank Human Interaction and On-demand Video Highest among Workplace Learning Methods," Desire2Learn, February 13, 2018
[16] Expert Interviews conducted by ENGINE on behalf of Dale Carnegie Training, January 2020

"Face-to-face is, of course, very rich. People get to build relationships. It certainly makes sense with soft skills and leadership development skills and even diversity and inclusion skills for people to be in a room."

- Judy Tso, MAA, PCC, CMF
Leadership Development Expert

"You need to be present. We're talking about collaboration and teamwork. How are you going to show that if you are doing e-learning? People need to interact."

-Wanda Piña-Ramírez
Partner at The Human Factor Consulting Group

ongoing to better understand the memory-enhancing effects of emotion, using neuroimaging to enhance the understanding of emotional influences on learning and memory processes.[17]

Live interactions naturally involve emotions, and good facilitators consciously create a learning environment that evokes the emotions that are most helpful in the learning process. They can read participants' non-verbal cues and modify, emphasize or repeat key elements in real time, leveraging critical moments of opportunity.

According to constructivist views of learning, people learn by building on the background knowledge they bring to the learning situation. Since each learner has their own background knowledge based on their experiences and interests, each person makes different connections to the new material.[18]

Interacting with other people has also clearly been shown to be effective in helping learners organize their thoughts, reflect on their understanding and identify gaps in their reasoning. It facilitates engagement and boosts learning effectiveness.[19] Different types of classroom experiences can support peer learning, reciprocal teaching, learning by teaching, learning by observation, learning by doing and self-other monitoring, all of which can be powerful for improving understanding and retention.[20]

In addition, as relationships develop between participants and the instructor and among the participants, it can raise the level of engagement and mutual accountability for learning. As another expert we interviewed stated, "Face-to-face is, of course, very rich. People get to build relationships. It certainly makes sense with soft skills and leadership development skills — and even diversity and inclusion skills — for people to be in a room."[21]

On top of that, the dialogue and social interaction that occurs during exercises and group activities enhances learners' critical thinking and problem-solving skills, two of the skills mentioned earlier as part of the skills gap many organizations have identified. These factors are part of what makes learning in person, as a part of a group, so effective.

Overlaying these needs and the physical learning journey is the process by which people learn new skills. When presented with learning a new content area, the first stage of the journey is *awareness*, where learners acquire the foundational knowledge about the skill area. The next stage begins to incorporate *experiences*, as participants actually learn the skill itself, which is generally accomplished through demonstration and doing.

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[17] "The Influences of Emotion on Learning and Memory," Frontiers in Psychology, August 2017
[18] "The Impact of Social Interaction on Student Learning," Reading Horizons, September/October 2013
[19] "Blended workplace learning: the value of human interaction," Education & Training, 2019
[20] "Social Interactions and Learning," Encyclopedia of the Sciences of Learning, 2012
[21] Expert Interviews conducted by ENGINE on behalf of Dale Carnegie Training, January 2020
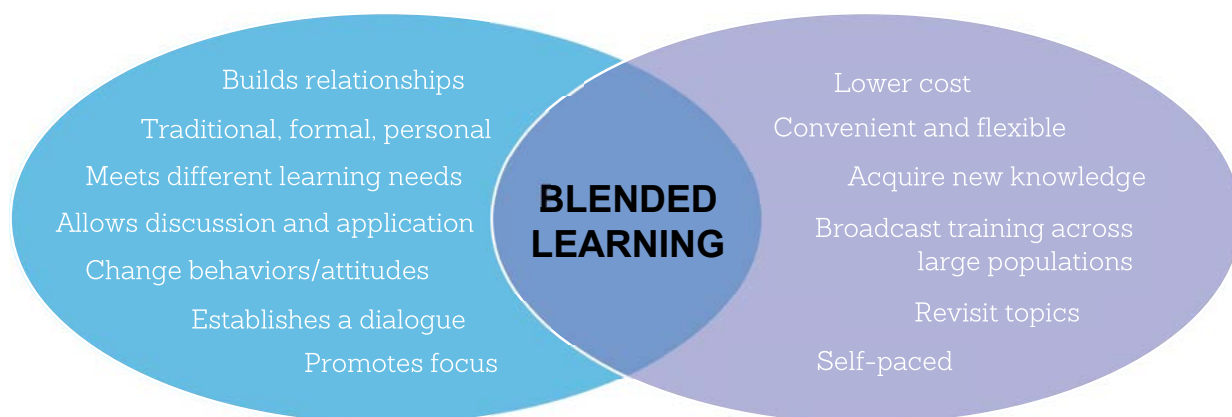
To progress further, learners must apply the new skill to real-life situations in their daily work, and finally, people need to truly master new skills during the *sustainment* phase in order to turn them into behaviors they can be relied on to use consistently. Clearly, some of these phases are better suited to being supported by digital modalities than others.

Given the complexity of the physical and skill development learning journeys of the modern workforce, coupled with the challenges L&D professionals face with limited resources to address the critical soft skills gap, the lack of clarity regarding the most effective and efficient blend of delivering training to implement throughout the learning experience is understandable.

In the next section we offer our guidance: a blended solution approach that considers the various strengths and weakness of digital and face-to-face modalities, specifically in the context of soft skills training content.

Designing an Ideal Blended Approach for Soft Skills

As we have already seen, traditional, instructor-led classroom training and digital modalities each have their strengths and weaknesses. There is no one-size-fits-all best approach. Rather, the architecture of an appropriate blended solution will depend upon the technologies available, the geographic scope of the workforce, resources available and a host of other factors. As the figure below shows, ILT is particularly effective for changing behaviors and developing interpersonal skills. A highly skilled facilitator in the classroom — or virtually as a next best option — can create a safe learning environment, accommodate

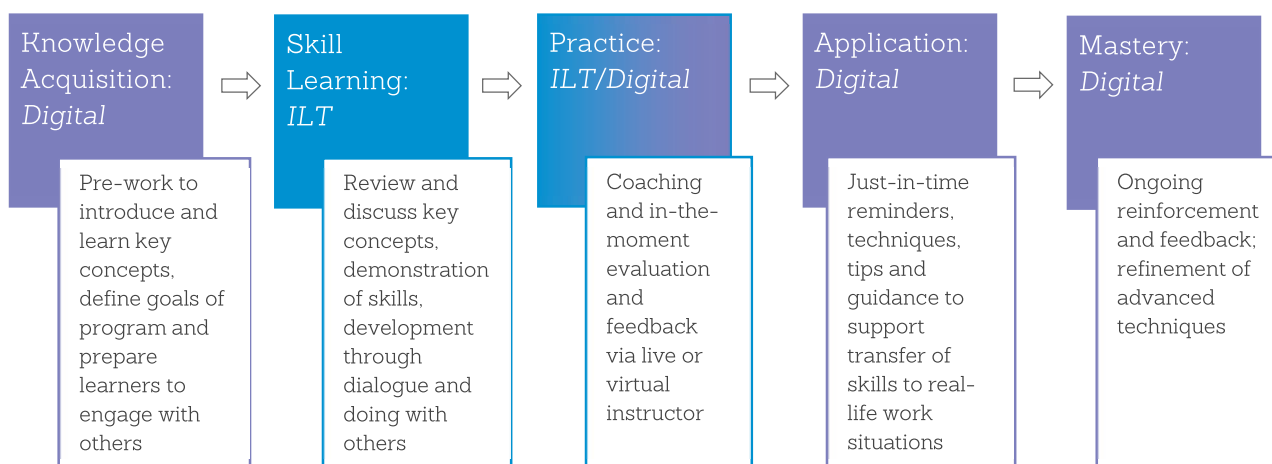| Instructor-Led Training is ideal when:	e-Learning is ideal when:
• It is important to change behaviors. • The content covers multiple areas of development and skills proficiency. • The desired learning seeks to involve the five senses in higher level developmental learning. • The desired outcomes are improved focus, skills practice, increased adaptability and face-to-face dialogue. • It is vital to have a safe place with trust and confidentiality so that feedback can occur.	• It is necessary to broadcast a common training across a large population of users. • The outcome is to improve compliance, such as software and technical skill-building courses. • There is need to revisit a topic. • Pre-work is a desired option. • Training is focused on knowledge acquisition.

Source: "A Blended Learning Approach for Success in Today's Global Workforce", Cultural Awareness International, February 2016

multiple learning styles, ensure focus, stimulate meaningful dialogue and provide in-the-moment feedback.

Digital modalities have been found to be effective for acquiring knowledge, performing pre-work and revisiting concepts for reinforcement and sustainment. The obvious practical benefits of digital delivery include the ability to reach a large number of remote learners and the convenience and flexibility that come with on-demand availability on learners' devices of choice. Providing a self-paced option also accommodates those who learn at different speeds.

Any blended training delivery solution should take into consideration these strengths and weaknesses for supporting the specific learning journey in question. For example, mobile delivery of training has been found to be limited in some industries, such as in financial services, due to regulations and data security concerns with employees using external applications on their phones. And clearly, live classroom, instructor-led training is not feasible as long as social distancing regulations are in place.

The blended training delivery model depicted below is based on our research and years of experience in offering classroom and digital instructor-led training. Our Performance Change Pathway™ approach considers the stages of the learning journey and defines a recommended modality and objective for each phase, taking into consideration the importance of the awareness, experience and sustainment components of an effective learning program.

Knowledge Acquisition: *Digital*	Skill Learning: *ILT*	Practice: *ILT/Digital*	Application: *Digital*	Mastery: *Digital*
Pre-work to introduce and learn key concepts, define goals of program and prepare learners to engage with others	Review and discuss key concepts, demonstration of skills, development through dialogue and doing with others	Coaching and in-the-moment evaluation and feedback via live or virtual instructor	Just-in-time reminders, techniques, tips and guidance to support transfer of skills to real-life work situations	Ongoing reinforcement and feedback; refinement of advanced techniques

Knowledge Acquisition: Digital modalities can now effectively support the knowledge acquisition phase for most learners. Appropriate applications could include pre-work to introduce key concepts, defining the goals of program and providing learners with the foundational knowledge they need to engage in meaningful ways with others.

Skill Learning: Instructor-led training remains the best method for deeper discussions of key concepts and the demonstration and coaching of soft skills. Live classroom training is ideal for the development of these skills through collaborative learning, social interaction and dialogue. Regarding virtual live delivery, as one of the experts we interviewed said, "I think you can't replace the power of face-to-face. The best thing that we can do is, from a practical perspective, capture that face-to-face excitement — that sort of almost visceral meaningfulness — that you get from being in the same room with an expert."

At the same time, while we've all become painfully aware of the limitations of chat functions and messaging when it comes to meaningful group dialogue, platforms exist that can enable highly skilled facilitators to deliver many of the benefits we associate with live classroom training in a virtual setting. Video conferencing tools have advanced considerably, but it takes expert instructors to notice and act on the subtle cues learners provide to personalize the learning experience and fully engage participants remotely.

Additionally, creating a safe learning environment and establishing trust among a group of people online takes experience. Without that trust, though, leaners won't ask questions freely or feel comfortable with the vulnerability that comes with practicing new skills.

Practice: Role playing, expert evaluation, coaching and in-the-moment feedback are other areas where live instruction is best. L&D expert Wanda Piña-Ramírez, a partner at The Human Factor Consulting Group, contends, "You need to be present. We're talking about collaboration and teamwork. How are you going to show that if you are doing e-learning? People need to interact."

That said, experienced virtual instructors, with the help of technology that allows for collaborative sharing via virtual break-out rooms, can offer a reasonable alternative when live training isn't possible.

Application: As the learning journey progresses to real-world application, digital modalities again become more relevant. Just-in-time reminders, techniques, tips and guidance to support transfer of skills to real-life work situations can now be digitally delivered. At the same time, social learning at this stage can also be particularly valuable and may come in the form of continued access to instructors and/or fellow participants for practice, reflection and support.

Mastery: Digital modalities can also provide ongoing reinforcement and feedback, helping learners revisit key takeaways and sustain their behavior change.

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-Patricia Franklin
Learning-Product Design and Development Professional

"[T]here is so much richness in being together. Whether that's getting to know each other, having that interpersonal interaction face-to-face or building networks, there are a lot of benefits to being in that face-to-face environment."

-Judy Tso, MAA, PCC, CMF
Leadership Development Expert

The Bottom Line

When it comes to the optimal blend of training modalities for effectively building soft skills, industry experts still tend to agree: While digital modalities can be implemented effectively for certain phases of the learner journey, face-to-face training remains the gold standard for the core work of learning and practicing soft skills.

That may change as AI-based, AR/VR computer simulations become sophisticated enough to engage learners and genuinely evoke the emotions that enable learning and memory to the same degree that human interaction does so naturally. In the meantime, when constraints won't allow for live face-to-face, virtual instructor-led training programs can now offer many of the same valuable benefits, as long as they are facilitated by highly skilled instructors using platforms that allow for meaningful dialogue and interactions between the instructors and participants and among learners themselves.

While the digital transformation of the training industry continues to advance, evidence of the value of human interaction and engagement remains irrefutable. When developing soft skills is the objective, L&D professionals who leverage the best of both worlds are taking a smart approach.

What Makes Dale Carnegie Trainers So Effective?

Dale Carnegie trainers are uniquely skilled in delivering training, whether live online or in person.

The primary reason clients report such consistent success with our training programs is our trainer development process. Becoming a certified Dale Carnegie trainer requires candidates to complete a rigorous curriculum with checkpoints, evaluation and coaching at every point along the way. Before delivering any of our products, trainers participate in a minimum of 158 hours of training, plus an additional 20 hours to become certified to train online. During this extensive process, our trainers-in-training must:

1. Complete the course(s) they will train as a participant themselves
2. Demonstrate a deep understanding of — and the ability to exemplify — Dale Carnegie's core values, training techniques and trainer behaviors
3. Successfully facilitate the course(s) by meeting or exceeding all training standards in an assessment performed by experienced Dale Carnegie trainer coaches
4. Serve as a graduate assistant to deepen their understanding and enhance their skills
5. Facilitate the course(s) — on average at least twice — alongside an experienced trainer

Only then do our trainers become certified, ensuring that your training program, whether delivered in person or live online, will be led by someone highly qualified and fully prepared to deliver the transformational learning experience your participants want and deserve.

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