



# Learning Insights

Finding true north in a digital blizzard

**“TRYING TO FIND THE BEST THING FOR US, WITH ALL THESE NEW TECHNOLOGIES AND IDEAS COMING AT US AND THE SHEER SPEED OF IT ALL, IT’S LIKE SEARCHING FOR TRUE NORTH IN A DIGITAL BLIZZARD.”**

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# Foreword

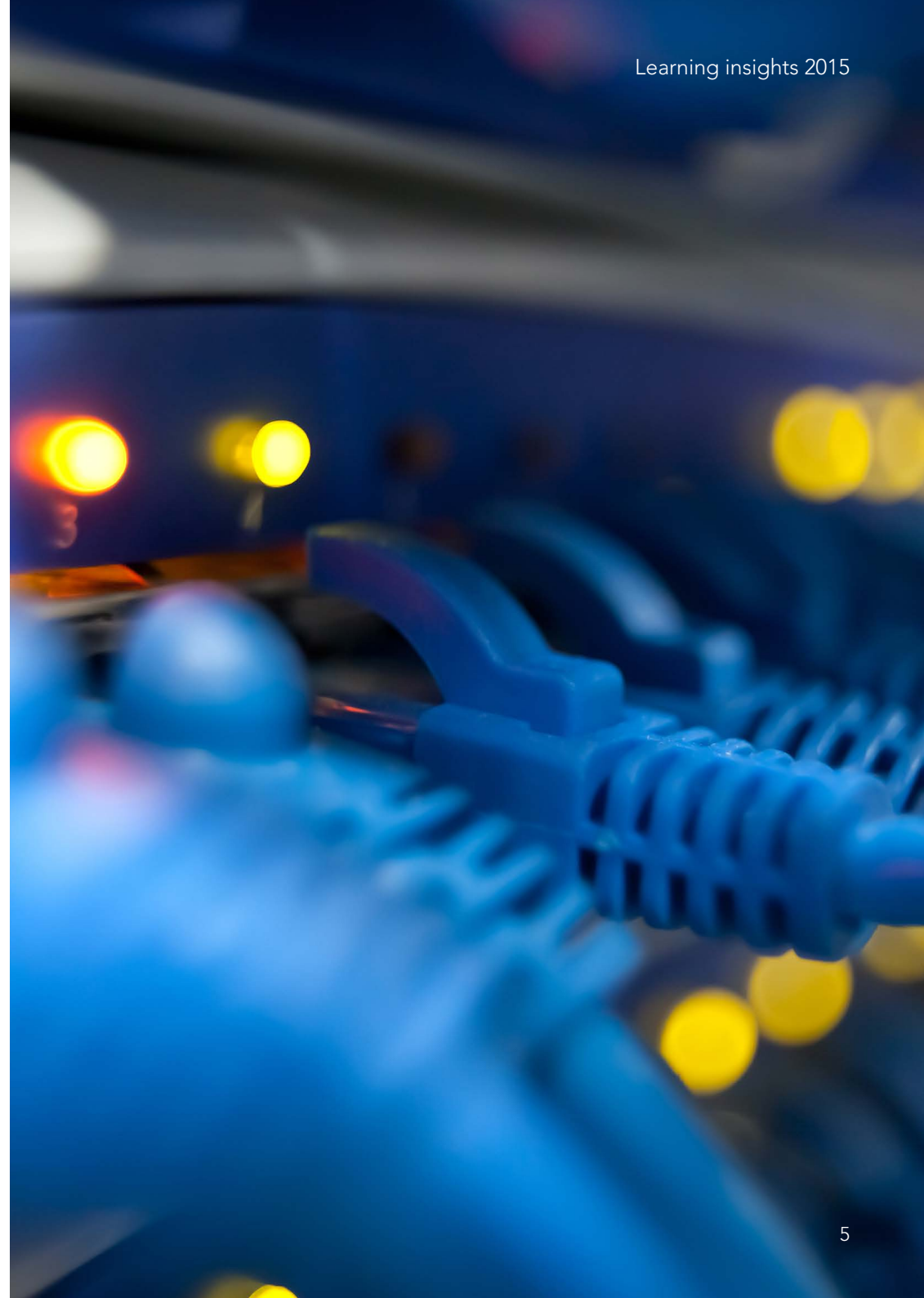
Thanks for taking time out to read the latest annual Learning Insights report from City & Guilds Kineo, produced in conjunction with our friends at Learning Technologies. It's now over 10 years since Kineo was founded to change how learning technology was used in the workplace. So now seems like a good time to consider the changes that have taken place over that decade. The learning and development world certainly seems like a very different place nowadays.

But what is really different? It's true that technology has moved on at pace and we can see from this year's report that the sheer range of solutions on offer is bewildering to some L&D professionals. Learners' demands have shifted along with tech changes – they're looking for an experience that mirrors how they learn and find information in their everyday lives.

Despite the changes in delivery, though, I believe that the underlying pedagogy remains the same. A great learning experience is still a great learning experience no matter how it's delivered. L&D must still align with business needs. In that search for true north perhaps now's the time to pause – look up, look ahead and scan the landscape. Take a moment out of the maelstrom to re-establish your sense of direction. We must all do that from time to time.

As usual for this report, we interviewed learning and development professionals in a deliberately wide variety of work contexts to explore challenges and trends. I'd like to thank everyone who participated and shared their views this year. You demonstrated great wit and wisdom and shared some great insights – I hope this report reflects that.

**Matt Johnson**  
Global Managing Director  
City & Guilds Kineo



# Introduction

It's clear that many of the participants in our research are using a vast range of different approaches in their learning solutions, but all shared the view that there is a bewildering number of options out there for solving their training challenges.

"Searching for true north in a digital blizzard" was how one person described trying to find the best way to deliver workplace learning. It is easy to be side-tracked by technology and overwhelmed by the alternatives (and the noise surrounding those options). Certainly, many of our interviewees mentioned the same issues that have come up in previous reports, which in turn raises the questions, 'why aren't we getting on with these issues?' and 'what can we do to change that?' However, there is a clear determination in the minds of many of our participants to focus on business needs and use them as a key factor in deciding future approaches.

Face-to face training is clearly still with us and, if anything, seems to have found a crucial new place at the heart of blends that are often primarily digitally delivered. So, it feels like we have lost none of the core tools in the L&D armoury but have gained many more.

In the last 10 years, the biggest change has been the ubiquity of the web and all our changing habits and behaviours involving technology. University research in the UK <sup>1</sup> suggests we check our smartphones on average 85 times each day, with more than half of this usage lasting only around 30 seconds. This adds up to several hours of smartphone use each day.

Most, of course, is purely social (including listening to music, web browsing and using apps) but many of our interviewees felt the effect of our relationship with technology and the expectations of people at work should not be underestimated. Learners now expect instant, easily available learning content that's quick to go through, is bang up to date, and looks and feels as good as the games they play and the websites they browse. So, no pressure there then!

No wonder there's some anxiety within the L&D community about the need to catch up, to keep up, or stay ahead of the game.

**"IF YOU CAN  
KEEP YOUR  
HEAD WHEN  
ALL ABOUT YOU  
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THEIRS..."**

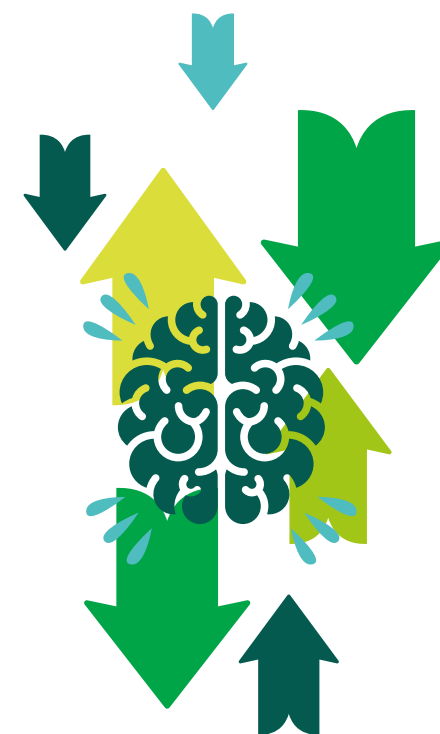
**'If' by Rudyard Kipling**

It is a time for some calm and considered thinking. Let the digital blizzard blow as hard as it likes. Let's step back and focus on the real point of what we are doing, as the Stanford Institute of Design's guide to design thinking puts it, "To create meaningful innovations, you need to know your users and care about their lives."<sup>2</sup>

It's about focusing on the learner and what they need. It's about avoiding getting fixated on the latest new thing around the corner, but still being open to try things out. It's clear from our interviews that some things will work better in different environments. So, if informal social learning is not right for your environment,

don't worry that others are doing it and not you. But, at least, give it a go – you might be surprised about its suitability to your organisation. If it doesn't work, then try something else. Controlled trials can be a safe and very effective way of checking out all of those options.

So, keep calm and read our report. There are lots of ideas here that will help you find your true north. We look forward to your feedback and thoughts.



# Where do I start?

"Everyone understands the implications of the digital revolution, however we often find ourselves paralysed by the enormity and complexity of this agenda, 'where do I start?'

At Barclays we have switched our approach to focus on the things that really matter. Firstly we invest our time to truly understand our customers' problem statements, from which we construct our ideas and prototypes which we test, test and test some more. This approach comes with risk: for this to work you need to accept and embrace failure and for every innovation there will be those ideas which don't make the grade.

The joy though comes from the process, no endless waiting for agreement, instead a creative journey which involves your customers and stakeholders, which grows and builds through its different iterations."

Gary Spring  
Design Team Manager | PCB Academy  
Barclays

WHAT'S BEEN  
THE BIGGEST  
*Surprise*  
IN THE LAST  
**10**  
YEARS?

Which  
**TECHNOLOGY**  
has had the most  
*Impact?*

How have  
*learners'*  
**EXPECTATIONS**  
**CHANGED**  
over the last  
**10 years?**

How have  
*our*  
**EXPECTATIONS**  
**OF LEARNERS**  
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— **WHAT'S DRIVING**  
— **CHANGE IN THE**  
— **WORKPLACE?**

WE FRAMED OUR  
INTERVIEWS WITH  
OUR CONTRIB-  
UTORS AROUND  
A NUMBER OF  
QUESTIONS AND  
HAVE DISTILLED  
THE RESPONSES  
OF THESE INTO THE  
FOLLOWING SIX BIG  
QUESTIONS:

WHAT IS THE  
*elephant*  
IN THE ROOM?



WHAT ARE  
YOUR TOP  
PRIORITIES  
FOR THE  
FUTURE?





# What's been the biggest surprise in the last 10 years?

Without exception, our interviewees all cited technology as the major game changer in the last 10 years, with the speed of development being unprecedented. From social media to YouTube to smartphones, the way we access information has had a huge impact on the way we can learn.

## The tech highlights

In our next insight 'Where has technology had a major impact in the last 10 years?', we'll look at the specifics in more detail but for now here's some brief highlights on where the changes have happened:

- Search engines - With the growth of Google, YouTube, MOOCs and the like, people have access to a wealth of knowledge; "it's much more about now. I want to learn this and I want to learn it now."
- Switch from Flash to HTML5 – Many feared that we would lose the visually rich animated style we'd come to cherish in Flash, but actually in a device-ready world HTML5 has expanded and developed to fill the gap, creating a new way of delivering engaging content.
- Bring Your Own Device (BYOD) – With the influx of learning developed in HTML5 there has been the opportunity for BYOD, which has also led to some changes in learning behaviours, such as being expected to learn in your own time.
- Multiple sources of information – The role of the L&D specialist has become more one of curator than creator; "access to learning content is no longer limited to internal channels. L&D needs to embrace this challenge and work hard to remain relevant in this new world."



- Social media – This has had a huge influence on how we share knowledge and understanding across global networks.

**“IT’S MUCH MORE ABOUT NOW. I WANT TO LEARN THIS AND I WANT TO LEARN IT NOW.”**

### The rise of elearning

Alongside the tech changes, elearning has also grown more rapidly and become more prolific than was anticipated. The benefits to this are multiple and measurable, as many organisations are finding out by looking into the ROI. As one learning professional told us: “The key thing for us has been automation. We can deliver a fairly consistent experience to 17,000 staff around the world regardless of their language.”

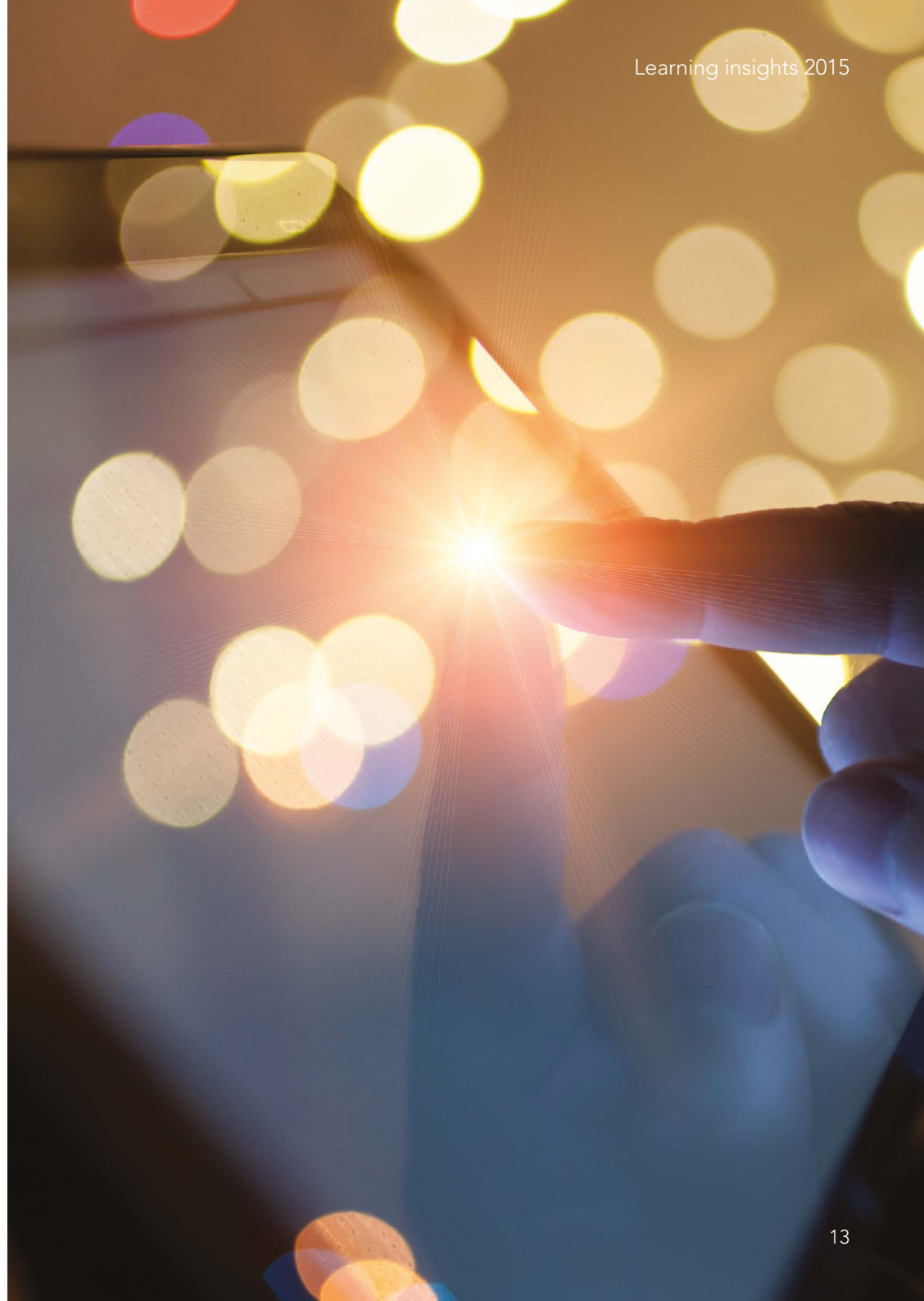
### Changes to the L&D workforce

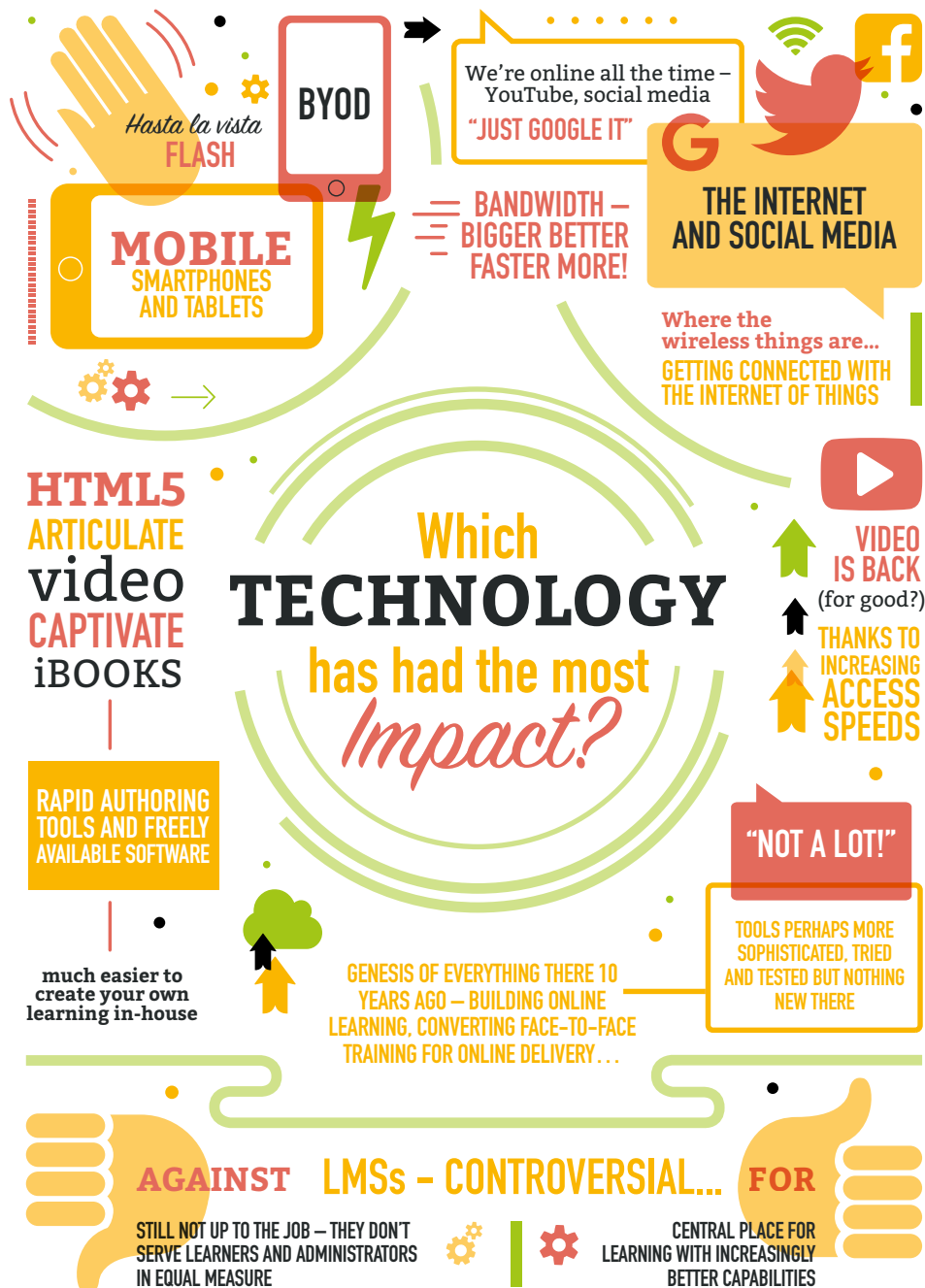
This prevalence of digital-based learning has also meant there has been a major change in the L&D workforce, both in terms of numbers and skillsets. 10 years ago there was a massive delivery workforce but due to the global economic conditions, it’s not surprising that this is now not the case: “We can’t just deliver classroom to the number of people we need to deliver to, it’s just not cost-effective in a global organisation.” L&D departments are constantly being asked to do more with less.

### Change in expectations

There is also a shift in the expectation of learners both due to their own internet consumption and the proliferation of digital learning mechanisms: “with the increased availability of elearning the expectation may be that employees learn on their own time versus regular working hours.” One of our other interviewees stated that “there is still an expectation that learners will fit elearning in at their desk, with phones ringing and colleagues or customers interrupting all the time”. In addition to these changes in expectations of when they learn, there are also more exacting standards from learners, based on the type of information they are constantly seeing on the web.

In summary, we can conclusively say that the industry has changed dramatically over the last 10 years. None of the factors we’ve discussed here can be viewed in isolation; they’re inter-related and their combination is the reason for the current landscape.





# What technology has had the biggest impact?

Technology is moving at an incredibly fast pace – and as learning providers we need to be able to adapt and keep up with it. Unsurprisingly most of our interviewees cited the internet as the game changer.

"The internet has radically changed learning provision," one L&D pro told us, "In the old days L&D professionals would engage designers or buy in material. The internet has made free content and research so available that it's easy to design courses in house now."

raising exercises or full blended programmes.

## A device-ready world

The change from Flash to HTML5 had to happen and there were fears that we would lose the visual impact and flexibility of Flash. But actually in a device-ready world HTML5 has expanded and developed to fill that gap, creating not just a new way of delivering engaging content but opportunities for Bring Your Own Device (BYOD) to make learning something that can happen anytime, anyplace.

## All you need to do is search

Google and YouTube are bringing a new dimension to just-in-time learning. "It's much more about now. I want to learn this and I want to learn it now." The people we spoke to raised some concerns about the quality and authenticity of content, although it was also observed that multiple sources of information can be of benefit. They saw plenty of opportunity for learning interventions to play a part, whether these were campaign-based awareness-

**"THE MOVE FROM ADOBE FLASH TO HTML IS A MASSIVE SHIFT"**

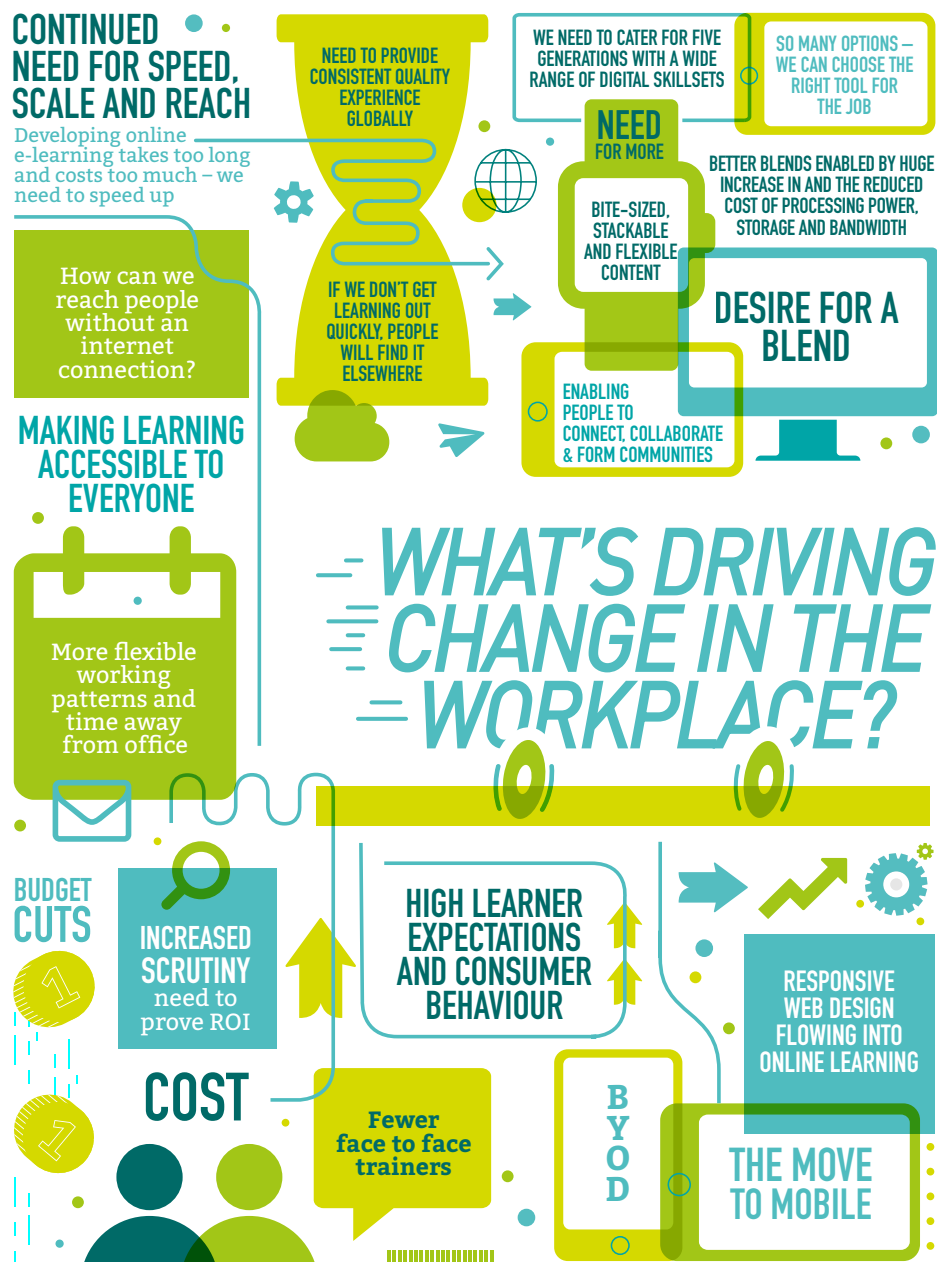


"The move from Adobe Flash to HTML is a massive shift," said one L&D expert, "It allows us to not only assume all learners have the technology needed and ready to view our content without an extra barrier of entry, but allows us to expand beyond the traditional pop-up window we are used to."

### The influx of social learning

Social media has had a huge influence on how we share knowledge and understanding across global networks. Elearning has always had a role to play in creating a consistent learning experience but now people are considering how to feed into that and take learning further through social channels. For example, we have seen organisations scrap their traditional LMS in favour of platforms which have social learning at their core. Equally "Businesses are terrified by the lack of control they face when trying to integrate social networking into training." As organisations are finding their way in this area there's more to do to build social strategies that have the impact they want to see, ensuring a self-sustaining continuation of learning.





# What's driving change in the workplace?

## Technology is the key driver and enabler

As we've already uncovered, overwhelmingly our interviewees saw technology as being the biggest game changer in workplace learning and development. From increased access to a global network of information and people to the rise of social media and influx of smart devices, expectations are higher than ever. Alongside the need to retain employees through better engagement, the pressure is on to utilise technology media to create a great learning experience. As one of our interviewees said, "user expectations are now set by external online experiences not internal ones."

Technology is providing organisations with opportunities to do things better, cheaper and faster, as well as to develop new technology-enabled products and services. The drive to do more for less continues, threatening some roles through automation but creating new ones along the way.

However not everyone is online, all the time or with great bandwidth - let's consider more remote locations and people on the move: "We need a greater infrastructure to support learning. We have a lot of field-based sales people with dodgy internet connections." This is driving a demand for offline solutions.

## Flexible working patterns

An increasing number of people are working non-standard hours or from home rather than in an office. In the UK we've even seen the introduction of new laws to enable flexible working for all employees. This has also extended to work-based learning, one L&D professional commented, "there is now an expectation from most learners that they should be able to learn whenever they like."

And that can apply to learners all over the world. The growth of the internet has made it possible to communicate globally, and this is something people are keen to use to share knowledge and understanding.

### Developing and retaining employees in a transitional workforce context

As well as allowing for flexibility, employers are also recognising that there is a more transitional workforce, who move from place to place, rather than staying in one job for a long period of time. This puts additional pressure on employers to sufficiently motivate and engage employees so that they stick around. From a development perspective the challenge is needing to train employees to do their jobs well whilst recognising that this doesn't necessarily mean they'll stick around, so the ROI on the training investment may be poor.

**“USER EXPECTATIONS ARE NOW SET BY EXTERNAL ONLINE EXPERIENCES NOT INTERNAL ONES.”**

There is opportunity here to benefit from developing collaborative programmes that leverage expertise across or between businesses in the delivery of learning programmes. New roles such as Employee Engagement Champions have emerged to help tackle this issue and organisations are implementing talent development programmes to provide clear progression paths for their employees.

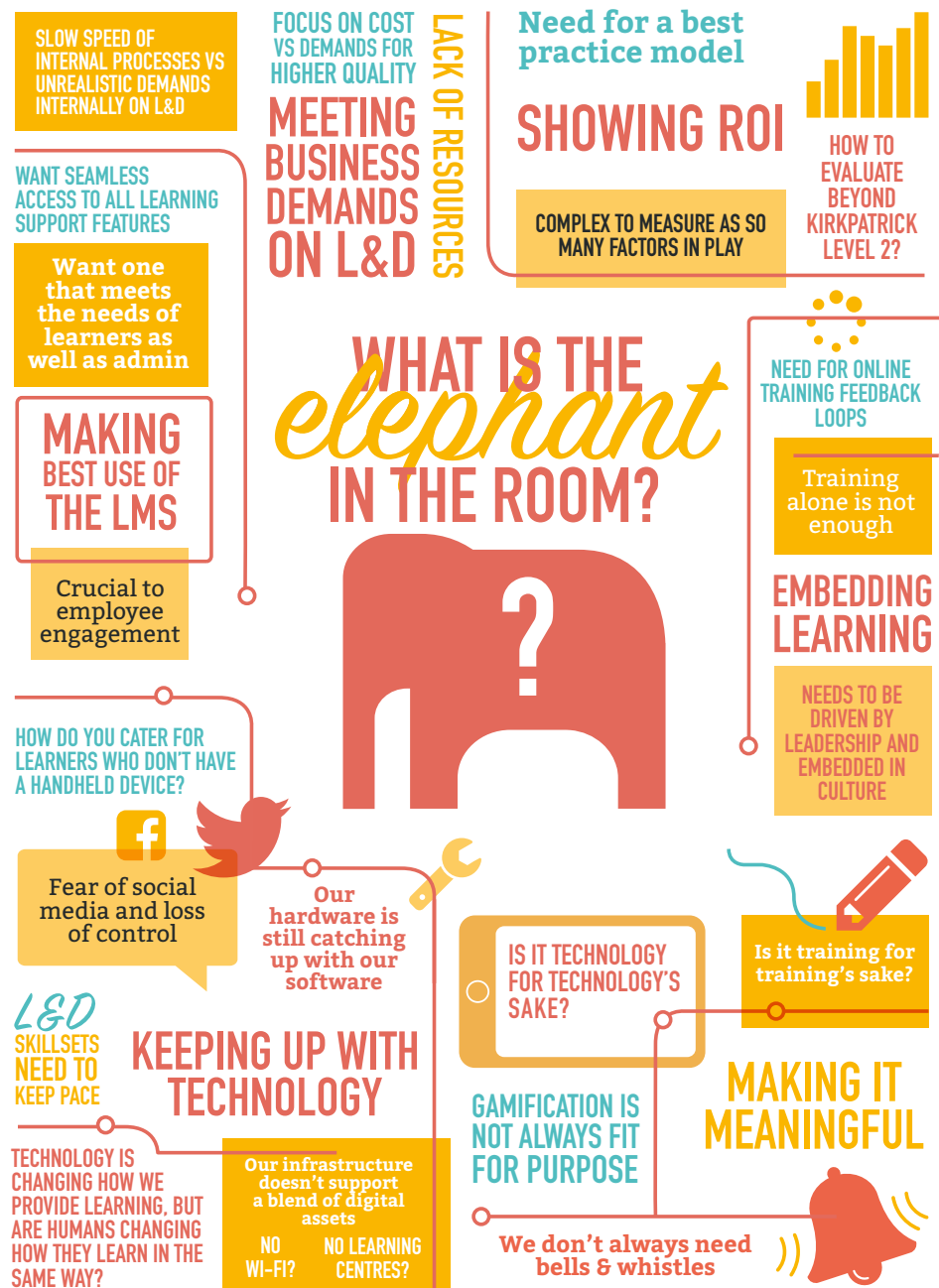
Apprenticeships is one development path that appears to help sustain employees. Statistics show that employees who benefitted from an apprenticeship programme are much more likely to remain loyal to the organisation and progress to management roles more quickly. In fact, 80% of employers say that implementing apprenticeship programmes reduces staff turnover rates.<sup>3</sup>

The takeaway message is that if learners feel supported and are given the information and guidance to succeed in their job role and beyond to the next role, they're likely to stick around a little longer.

3 See Evaluation of Apprenticeships for Learners, BIS, May 2012 and BIS/DfE Apprenticeships Unit Presentation 20 November 2013.







# What is the 'elephant in the room'?

So what is the elephant? That one thing that everyone knows is a problem but no one wants to acknowledge? You can tell us...

## Keeping up with the Joneses

It's not surprising that with all the changes in technology, it's a challenge to keep up. Our L&D professionals need to have an eye on whether employees' hardware keeps up with software, keep their own skills up to date with fast-moving technology developments and keep abreast of how learners are changing the way they learn in step with those technological changes.

One multinational told us controversially: "We've got a bunch of old gits in the training department who are trying to teach a bunch of new people how to do things and they just don't understand. People my age think we know about technology, but the reality is we're pretty clueless about how young people use it."

## Baby, it's cold outside

Quite apart from the challenges of keeping up with technology, many L&D departments said the elephant in the room is feeling caught between the progressive expectations of their learners and a cautious corporate culture that's suspicious of the ability of the likes of social media to bring business benefits. This split could cause a disconnect between learning providers and audiences which causes the intervention to become ineffective.

## LMS woes

Many people also reported that their LMS is the elephant in the room. This chimes with Brandon Hall's LMS Trends 2015 research: "More than 38% of companies that use an LMS are actively looking to replace their current solution [...] The top 10 reasons companies want to switch include challenges such as: a wish to move to the cloud, a lack of social/collaborative features, an outdated appearing system, and – at number one – that the organization's learning needs have changed."<sup>4</sup>

LMSs need to evolve, using UX best practice principles to create a seamless user experience that incorporates social learning into the blend intuitively.

**“SPEED OF DEVELOPING SOLUTIONS IS A CONSTANT CHALLENGE. THE EXPECTATION FROM OUR CLIENTS IS THAT WE CAN DESIGN, PROCURE, DEVELOP AND ROLL OUT AN ELEARNING MODULE IN SIX WEEKS.”**

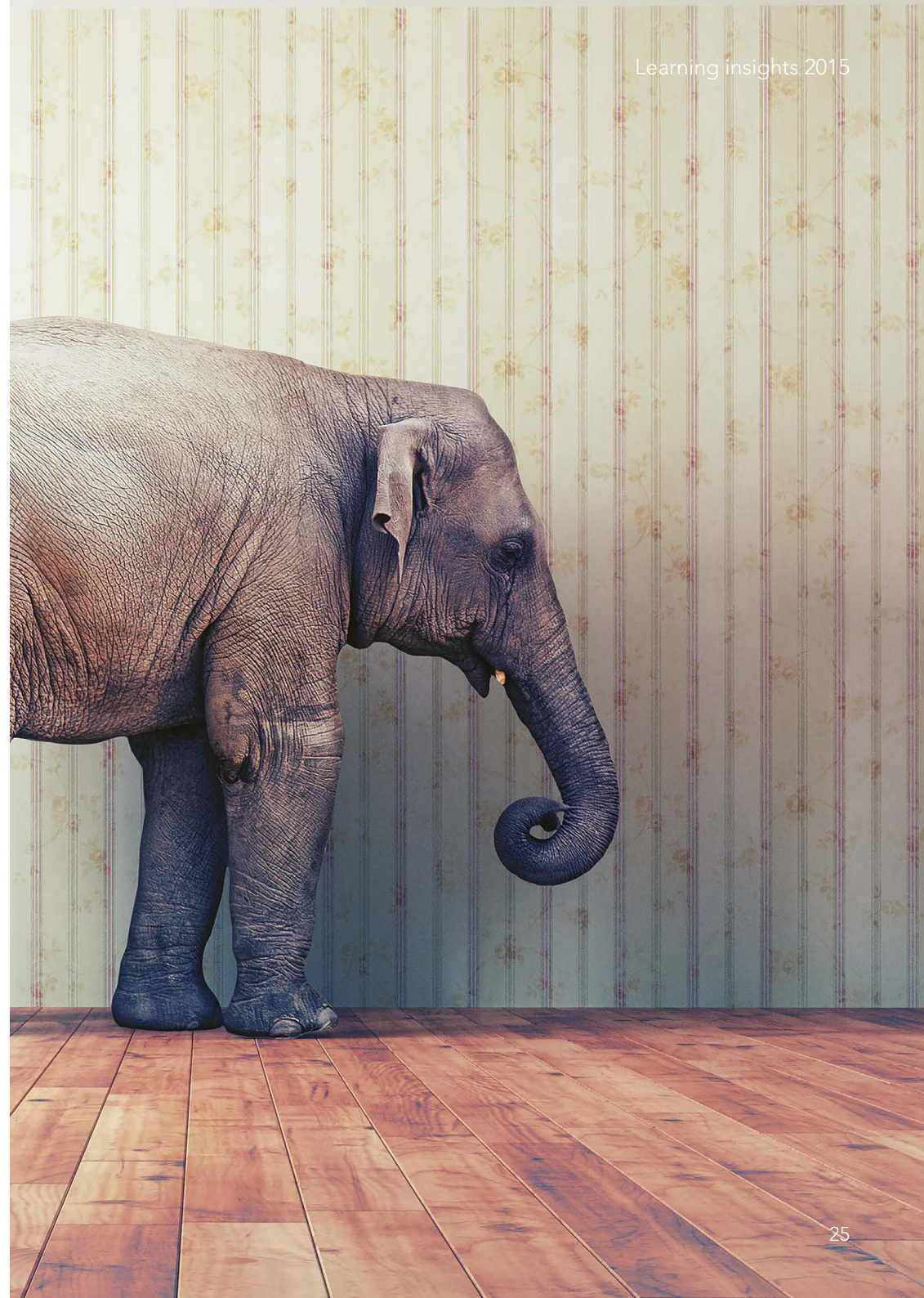
## Better, cheaper, faster

As we've reported in previous years, L&D professionals continue to feel under increasing pressure to provide learning

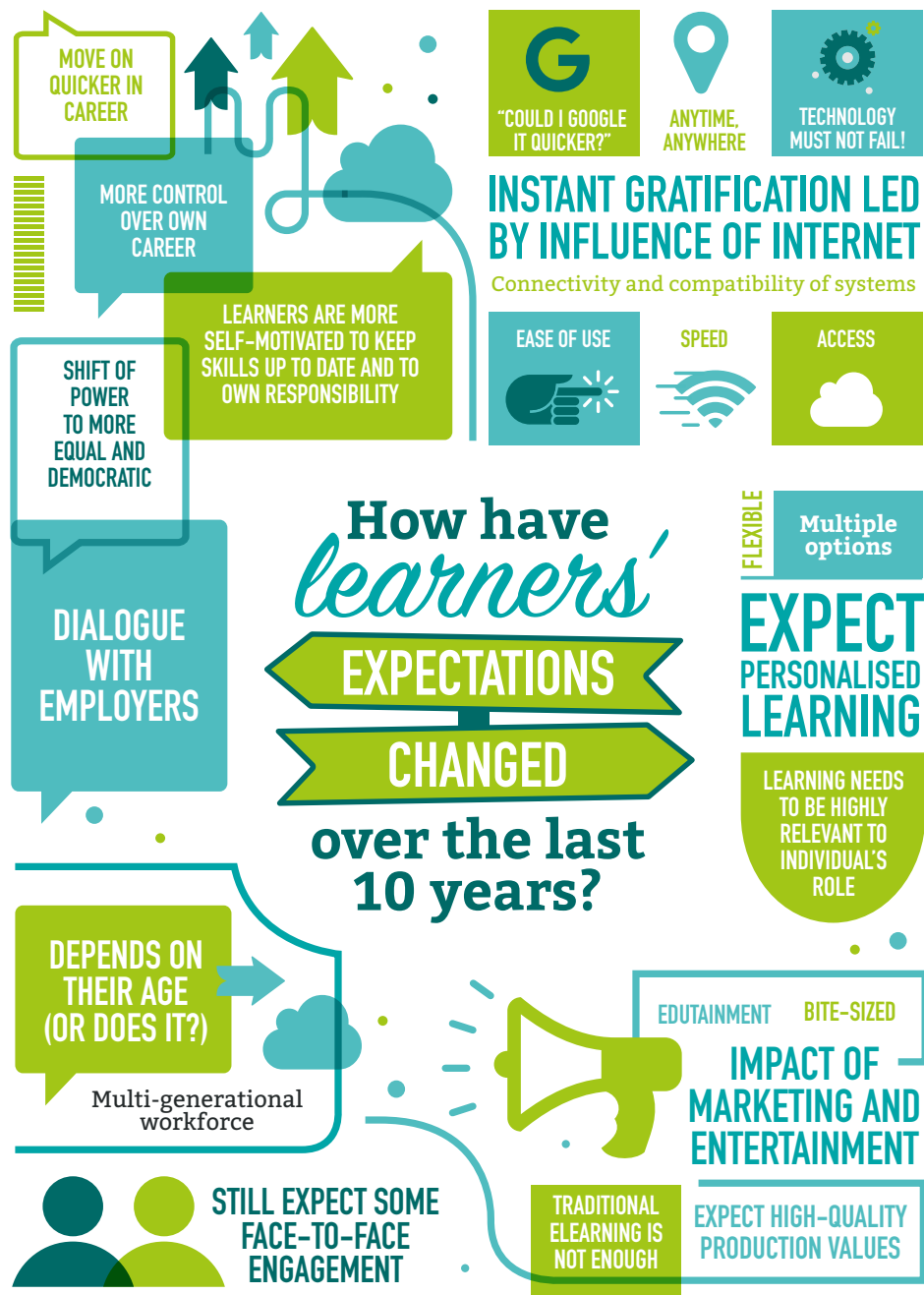
with higher production values, at higher speed, with smaller budgets and fewer resources. So what does this tell us? Do we just have to accept that we'll always be asked to do more for less, or will this drive ultimately take us to a saturation point – and how do we continue to develop effective learning in this context? And consider the following from one organisation, "There's not been enough resources to be able to meet the needs – both in people and money." A number of clients cited that L&D is still not showing their return on investment, so it remains a major issue.

It was heartening to hear support for those of us who develop elearning courses from some of our interviewees, "Speed of developing solutions is a constant challenge. The expectation from our clients is that we can design, procure, develop and roll out an elearning module in six weeks." "We want to communicate the effort that is involved in commissioning elearning within the business."

At the same time, there is an increasing requirement to demonstrate impact on the business in a meaningful evidence-based way, using behaviour change data. In future, we'll expect as a norm for this to be supported to a degree by the automation of embedded data analytics, but for the moment most people felt this is a tall order.







# How have expectations changed over the last 10 years?

## Self-service buffet

As the way we consume information has changed, so have our learning styles. There is so much out there, it'd be madness not to take advantage of this. We no longer have to wait for it to be served up to us on a plate. But how can we ensure that learners are getting the quality and authenticity of content that they need? It still comes back to the role of the learning provider to direct and provide guidance to learners.

One L&D professional told us: "My job is much more the role of curator now. I have to provide and create some content, but I can also curate the best bits from elsewhere."

## Equal partnership

Increasingly our learners are having a more self-motivated approach to taking ownership for their career and

development. As people move more frequently from one job to another, this raises questions about what this means for learning strategies, employee engagement and retention strategies. It also highlights the increasing relevance of transferrable open badge qualifications and independent Learning Record Stores (LRSs). The learner owns their completion of the learning and this can move with them to future jobs, increasing the opportunities for personal time investment, true motivation and responsibility by the learner.

**"I HAVE TO PROVIDE AND CREATE SOME CONTENT, BUT I CAN ALSO CURATE THE BEST BITS FROM ELSEWHERE."**

## Age is not a factor

Reports differ as to whether learners' expectations differ according to their age group and generation. Anecdotal evidence has suggested that it does, however according to a study from Steelcase 360 Magazine, 'What workers want'<sup>5</sup>, all generations have raised expectations of content and connectivity in the workplace and the only difference is the tendency of the Generation Ys to use headphones while they were working! All the more reason to work up authentic personas that do not generalise or assume what your audience needs are.

## It's not you, it's me

So do our expectations overlap with our learners'? Where is the disconnect and the harmony? Of course, we are all learners and consumers, and in that respect our general expectations are mostly aligned. However, there are a couple of areas that our interviewees identified. Firstly, while many organisations are merrily forging ahead with 'mobile-first' delivery of learning, not all learners are able or happy to BYOD, and neither are all organisations to support this – just another reminder for us to fully understand the audience. Equally – leading on from our section about challenges – sometimes learners' expectations of Hollywood production values and big-budget advertising and marketing standards can exceed L&D's more pragmatic aspirations.

<sup>5</sup> As quoted in [http://www.researchgate.net/publication/280423125\\_The\\_New\\_Normal\\_Emerging\\_Trends\\_in\\_2015](http://www.researchgate.net/publication/280423125_The_New_Normal_Emerging_Trends_in_2015)

INCREASE IN DIGITAL LEARNING AND DECREASE IN CLASSROOM TRAINING MEANS LESS RINGFENCED TIME PROTECTED FROM INTERRUPTIONS





# What are your top three priorities for the future?

Based on the answers provided in our surveys we've identified three key areas which L&D departments will be focusing on in 2016 and beyond.

## Career development

In terms of the type of content they are looking to prioritise in the immediate future, many of our L&D professionals cited career development, talent management and leadership and management. As one of our interviewees said "Our priority is top talent development – programmes that will bring forward talent and will improve pipeline."

This forward-thinking attitude was prevalent throughout our audience. They recognised that learners were taking more responsibility for their own learning, alongside the possibility of carrying their achievements with them through Open Badges or similar programmes. So a focus on career development and building a talent pipeline made perfect sense to them. It also helps to tackle the issues of the transitional workforce, helping employees to have clearer developmental paths through their

career progression and organisations to retain employees for longer.

## Blended and curated solutions

We've seen the impact technology has had in the last ten years and with this the L&D population have sought to develop blended learning solutions and introduce innovations. And they have an increasing wealth of tools and approaches to choose from: digital learning, MOOCs, social and mobile learning, virtual classrooms, immersive learning, gamification and more.

As one L&D professional put it, "our role very much switches from creator to curator; we use our expertise to put the learning out there, get people engaged and on board with using it as a tool to support them."



**“OUR ROLE VERY MUCH SWITCHES FROM CREATOR TO CURATOR; WE USE OUR EXPERTISE TO PUT THE LEARNING OUT THERE, GET PEOPLE ENGAGED AND ON BOARD WITH USING IT AS A TOOL TO SUPPORT THEM.”**

### Supporting self-led learning

As learners are used to seeking out information and learning for themselves so organisations are looking to provide tools and frameworks to support them in doing so, in a way that reflects the needs of both the individual and the organisation. As another of our interviewees said, “what I’d like to be able to see is not that we’re necessarily delivering formal learning to learners but that we are able to provide solutions that mean that learners can find it themselves - they’re learning without realising they are.”

LMSs need to evolve to match this need or they will be replaced by alternative ways of accessing and managing learning, such as more socially driven systems and the use of xAPI/Tin Can and LRSs. As per good UX design principles there needs to be as few barriers as possible between the learner and the learning experience. We also expect to see tools emerge to help learners find what they need quickly in the virtual sea of information.



# Next steps

## How can you find true north in the digital blizzard?

As we've seen from our interviews, there are many factors affecting business today - the changing nature of work, organisational structures, technology and digital trends, shifting workforce dynamics or external market and environmental forces. This is driving a fundamental shift and a need to change how workplace learning is delivered.

Many of these changes are being pushed by technology. Technology is the:

- cause of changes in our own preferences, expectations and practices - how we use digital solutions and how we interact with each other
- enabler of changes in the workplace ecosystem, such as working from home and supporting disparate global networks
- solution to the challenge of how we create ever more adaptable, efficient, effective and personalised L&D programmes.

The opinions and examples cited by our interviewees echo many of the insights cited in previous years of this report. So why is this? Why aren't we getting on with it? And what can we do to change that? These major themes are still common problems, and every year become magnified by the overwhelming number of technologies and different options that are out there.

To find your true north, don't try to keep up with everything and don't become fixated on trying to identify the next big thing - focus on what's important to you. "The direction of astronomical true north is marked in the skies by the north celestial pole."<sup>6</sup> Stay true to your own organisational needs and use that direction as your north celestial pole. That will help you navigate to what is right for your organisation.

So take a good look outside into the blizzard of different technologies, principles and ideas. Then step back and compare them to your own situation and capability.

Ask yourself a few crucial questions:

- Which ones are good for my organisation?
- Which ones could have a meaningful impact?
- Which ones do we have the capability to action, or where can we get that capability?

Seek advice, sense check and talk to other people, suppliers, your trusted advisors and experts.

Our advice is to start small and try it out. Take an agile approach and test out an idea in small populations, seeking help where you need it. Building a business case will help you think through goals

There will still be questions that remain unanswered as each organisation's needs are different. For example, how is the shift in workplace learning impacting your strategy? Do you have the right digital capabilities to implement the technical solutions you want try out? How can you simplify your response to growing demands and requirements on your function?

There's more advice and guidance coming soon, as we plan to explore some of these questions in the next few months. Watch this space.

So, all that remains is to wish you good luck with pursuing your true north! And if you need any help in the meantime feel free to come and talk to us.





# Thank you

City & Guilds Kineo helps the world's leading businesses improve performance through learning and technology. We combine 130 years of quality in learning, with award-winning customer service and innovation. We're here to take on your learning and performance challenges – and deliver results. So, how can we help you?

Fresh insights into what's really happening in learning technology and L&D from those who are working in it.

Our thanks to the organisations who participated in the research, which included:

- Babcock International Group
- IMI Precision Engineering
- Telenor
- Barclays
- KFC
- TP Vision
- Bristol Myers Squibb
- Legal & General
- Trades Union Congress
- Compass
- McDonald's
- TUI
- Domino's Pizza
- Mitchells & Butlers
- VSGv
- Elia
- Mott MacDonald
- Volkswagen
- First Group
- The Scout Association

**“USER EXPECTATIONS ARE NOW SET BY EXTERNAL ONLINE EXPERIENCES NOT INTERNAL ONES. WE NEED TO CREATE A SET CHANGE IN USER EXPERIENCE TO ENGAGE USERS.”**

**“Learners today have been marketed to their entire lives with high quality focused content - in order for us to stand out from the noise, we have to deliver not only an equivalent quality, but in many cases a higher quality than any expectation.”**

**“The rise of the use of personal devices at work means that colleagues' access to learning content is no longer limited to internal channels. L&D needs to embrace this challenge and work hard to remain relevant in this new world.”**

**“IN THEIR OUTSIDE OF WORK LIVES, COLLEAGUES ARE NOW MUCH MORE USED TO FINDING ANSWERS AND LEARNING AT THE POINT OF NEED, RATHER THAN BEING TRAINED IN ADVANCE.”**

**“NEW BUSINESS PLATFORMS WILL TRANSFORM THE WAY WE WORK AND WILL ENABLE US TO REACH REMOTE PEOPLE MORE EASILY.”**

# Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

Whatever your business challenge, we will partner with you every step of the way to find the learning solution that fits best – and delivers results. So, how can we help you?

**WE'RE  
SHAPING  
THE FUTURE  
OF LEARNING**



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[info@kineo.com](mailto:info@kineo.com) | [www.kineo.com](http://www.kineo.com) | +44 1273 764 070

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