



**Engage,
immerse
and inspire...**

with Extended Reality

Immersive Learning with XR

Research validates path for XR to
unlock the power of human potential



Introduction

Reality Check

After over a year of lockdowns due to the pandemic, reengagement has become an essential human need. Globally, people are aching to reconnect after lockdown—whether socializing in person, returning to offices for face-to-face interactions or learning in group settings. But the difficult experiences of the continuing global health crisis—along with the resultant unemployment, racial protests, political uprisings and calls for reform—have also changed us as citizens, consumers, and especially workers. We don't want to go back to the way things were, we want to go beyond. To create a better normal, we can take the digital technology lifeline that kept us together and extend it to meet the new reality.

Companies are scrambling to respond to this demand and the widespread employee disengagement wrought by all this turbulence. To regain or retain talent, for example, they're improving wages and announcing more flexible "work from anywhere" policies. They're also seeking new ways to develop essential skillsets, provide proper diversity training, and enable people to learn when and how they want.

Over 90 percent of surveyed executives agree that existing employee training methods need to be more effective for their workforce.

Accenture Immersive Learning Survey, 2021

Introduction

From the shopfloor to the C-suite, organizations that succeed in this balancing act will have embraced the new reality: reengaging fully with employees now means going beyond one-way training experiences (classroom or online), standard meetings, or point-and-click computer-based learning. It means engaging all the human senses, bringing novelty and excitement to collaborative situations, and offering interactive and immersive learning opportunities.

Active learning, which requires people to interact with the content in a lesson, has been used as an organizational development tool for decades. Typically, the more active the learning, the more effective the outcomes. Immersive learning is an advanced form of active learning that creates a fully simulated environment for learning, using extensive role play or situations where learners interact with the experience. When enabled by enterprise-ready technology, immersive learning provides exciting and impactful ways to engage and upskill/newskill employees through realistic, safe, and personalized experiences that are affordable at scale.

This Accenture research report outlines the business case and strategy for how to go beyond and create an enterprise-wide immersive learning rollout powered by extended reality (XR) technology.

Success depends on the right scope, scale, and agility—as well as collaboration between the Chief HR Officer/Learning & Development organization and Chief Technology Officer/IT organization. Based on Accenture’s research findings, we know sufficient business integration, workforce reach, and future flexibility are vital. To achieve these, our report also includes recommendations to help guide critical decisions across infrastructure, virtual reality (VR) hardware, software and content, and people and culture.

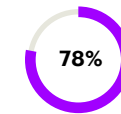
Reengagement with your workforce is necessary to meet the new reality of employee learning and development. Immersive learning can help your organization reengage fully with employees and hone vital skills for their productivity and personal growth while enabling your company to achieve key performance indicators in a more cost effective and sustainable manner.

Accenture Immersive Learning survey respondents across industries agree that the pandemic has exacerbated the gaps in current training and employee development approaches.

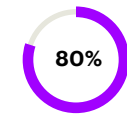
When thinking about disruptions to your employee learning during the COVID-19 pandemic, to what extent do you agree or disagree with the following statements?

Percentage of respondents in different industries who strongly agree or agree

The pandemic has forced my organization to rethink how workplace training is designed and delivered to ensure it is effective even in remote setups

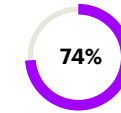


Banking & Insurance

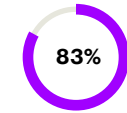


Online platforms

The pandemic has forced my organization to think of new ways to increase collaboration between employees, especially when they're working remotely

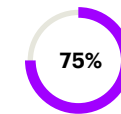


Consumer Goods & Services

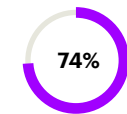


Banking & Insurance

The pandemic has accelerated the adoption of cloud technologies, forcing my organization to quickly upskill employees on the technologies using innovative learning methods



Energy & Utilities



Manufacturing

**Reengage
Me or Else:**

**Rethinking
Employee
Development**





The vast majority (**94 percent**) of today's workers say they **would stay at a company longer if it invested in their career development**—preferably through self-paced learning opportunities delivered at point of need.¹ However, only 26 percent of employees in an Accenture survey strongly agree that their employer prepares them for the future skills necessary to adopt and adapt to tech-enabled change. Increasingly this demand for on-the-job learning extends to behavioral or human skills such as empathy, complex problem solving, and giving performance feedback.

Looking ahead as **work becomes largely location independent, our Future of Work research shows 83 percent of employees prefer a hybrid work model.** Yet people will still need a sense of belonging that comes from company culture and support for social interactions. This is especially true for new hires, many of whom may never work inside the four walls of a corporate office. Providing immersive experiences for these next-gen workers will help improve employee satisfaction and retention.

1. LinkedIn Learning, 2018 Workplace Learning Report: The Rise and Responsibility of Talent Development in the New Labor Market <https://learning.linkedin.com/content/dam/me/learning/en-us/pdfs/linkedin-learning-workplace-learning-report-2018.pdf>

Reengage Me or Else

On the business side, employee development is turning into an urgent priority as enterprises face a growing global skills shortage.

It's increasingly difficult and costly to hire, develop, and retain employees, especially those with technical skills.²

What's more, the skillsets that companies need are evolving. Digital technology transformation and responsible business operations require new business models and advanced technologies such as cloud and artificial intelligence, leading to new roles and expectations that existing talent can no longer meet. The disruption of COVID has accelerated this trend dramatically. For example, during the pandemic, chipmaker ASML needed to

quickly transfer skills, and used augmented reality to enable experts to virtually enter customer factories and train on-site customer support engineers to complete service actions and solve issues.³

The technical skills shortfall is expected to reach more than 8.5 million workers by 2029 and cost \$1.2 trillion in lost economic output in the US alone.⁴

2. Penn Foster, The Cost of Hiring the Perfect Candidate vs. Training an Existing Employee <https://partners.pennfoster.edu/blog/2015/september/the-cost-of-hiring-the-perfect-candidate-vs.-d-,-training-an-existing-employee>

3. ASML, Augmented reality to the rescue during the coronavirus pandemic <https://www.asml.com/en/news/stories/2020/augmented-reality-to-the-rescue-coronavirus>

4. American Action Forum, Projecting Future Skill Shortages Through 2029 – AAF (americanactionforum.org) <https://www.americanactionforum.org/research/projecting-future-skill-shortages-through-2029/>



The imperative of this new reality cannot be ignored: Companies must increase their investments in employee learning and development just to remain competitive in the market. Moreover, they must find innovative ways to keep employees engaged—or risk losing them.

More than **90 percent of the executives** responding to our Accenture Immersive Learning survey agree, **saying their existing training methods need to be more effective and efficient.** Yet conventional approaches to training, such as instructor-led classes or online video series, can be less than optimal.

The deficiency begins with basic learning retention. **Despite spending an average of \$1,300 per employee annually on training,⁵ research proves that learners forget 70 percent of the content within 24 hours and nearly 90 percent in a month.⁶** In addition, one-size-fits-all employee development programs sometimes ignore the science behind learning, failing to accommodate the variety of learning styles or personalize learning agendas for workers.

5. Statista, Average Spend on Workplace Training Per Employee Worldwide from 2008-2019: www.statista.com/statistics/738519/workplace-training-spending-per-employee/

6. HDI: What Works in Professional Development: The Forgetting Curve, by Kate Bloom: www.thinkhdi.com/library/supportworld/2018/what-works-in-professional-development-forgetting-curve.aspx

Reengage Me or Else

High costs are another factor. Customized leadership development programs (which accommodate only a few) or large-scale training seminars where many employees must travel to a central location, not only have steep price tags but also thwart sustainability measures. All of this is compounded by the lack of direct ways to measure training effectiveness or show a return on investment. Without feedback loops embedded into the learning initiative, companies cannot tie training to employee performance or overall business operations.

To address these limitations, leading companies can go beyond, reinventing their Learning & Development programs and innovating with extended reality (XR) technologies—from augmented reality (AR), to virtual reality (VR) and mixed reality (MR)—to engage workers more deeply in the learning process.

“Where most companies go wrong is when they map behaviors generically to roles. Learning must be where you are, not where everyone else is. Learning must be contextual for it to stick. Companies need to shift away from ‘one and done’ personality tests. They are helpful in terms of insight, but not in terms of your ability to grow and shift.”

Sallyann Della Casa, Founder of GLEAC,
a learning analytics company

Findings:

**XR Value,
Investment,
and Action**



Findings

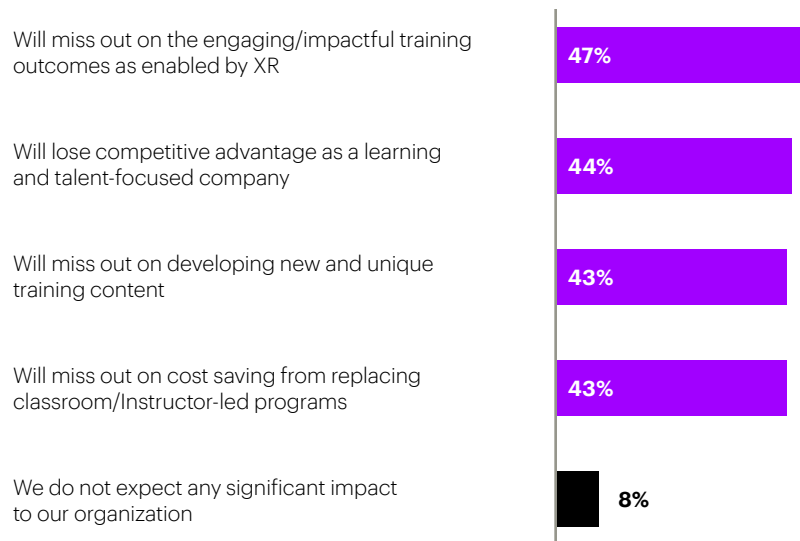
Our Immersive Learning survey participants (comprising CTOs, CEOs, CIOs, Chief HR Officers and Directors of Training & Development) strongly agree that XR will add value to their Learning & Development function in key ways—improving employee engagement and training outcomes, providing new opportunities to create unique training content, and contributing to their reputations as talent-focused companies while simultaneously reducing costs (see Figure 1). Equally important, companies are willing to devote significant budget to the effort.

More than half of respondents (59 percent) expect to make significant (over \$10 million) to moderate (between \$1 million and \$10 million) investments in XR learning initiatives in the next two years.

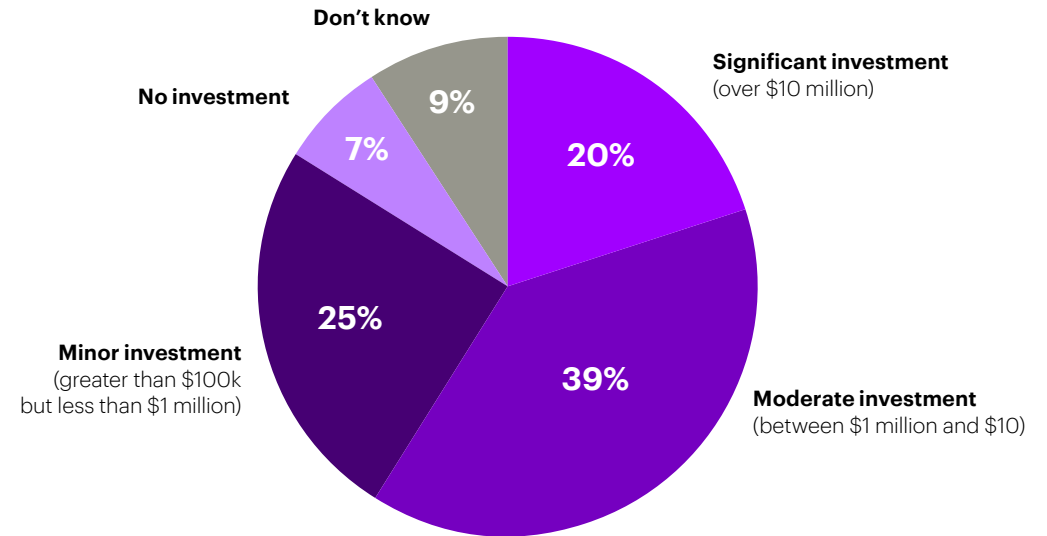
Findings

Figure 1: Executives agree that XR will add value to their Learning & Development function and are prepared to invest significant amounts. (Source: Accenture Immersive Learning survey, 2021)

In your opinion, what would the consequences to your Learning & Development functions be, if you do not invest in XR in the next 2-3 years?



What is your organization's expected investment over the next 2 years in XR for learning initiatives?



65 percent of executives who started evaluating XR did so because they expected to achieve tangible benefits—and a set of leaders are scaling the technology today.

What's clear from our research is how quickly leading businesses are moving to action. As companies strive to reengage employees and provide more effective and flexible learning opportunities, they see the value of XR technologies.

These leaders recognize the validity of the business case: Immersive learning through XR combines a safe and fully interactive environment with data collection capabilities for analytics, which creates a highly effective learning experience. Plus, companies can offer a variety of tailored and adaptive scenarios on-demand and at scale.

Implementing XR can provide leverage to both companies and employees and unfold the true potential of XR in the enterprise. The immersive nature of XR helps employees stay highly engaged and relevant, while the data generated from its use helps companies make informed business decisions.

“XR enables companies to close the gap between the efficacy of training and the measurement of training returns—giving companies the opportunity to tangibly calculate ROI of their learning initiatives.”

Kyle Jackson, CEO and Co-Founder, Talespin

Delivering:

Powerful Benefits



Delivering

Based on Accenture client experience (see example on the next page), immersive learning solutions powered by XR can improve quality of training through simulation-based experiential learning, and enhance learning retention and recall of concepts. These solutions also offer a risk-free training environment for in-the-field scenarios, including hazardous situations, and humanize remote collaboration by enabling sensory experiences and life-like instincts. They also

create an effective setting for simulated human interactions, which can help workers enhance people skills such as communication and empathy.

From an organizational perspective, our client experience shows that immersive learning through XR fosters a continuous learning environment, helping employees confidently prepare for their roles while on the job and providing instant feedback in a virtual,

collaborative space. Learners can also choose to take lessons independently or in groups and repeat the activity until they achieve mastery. Last but not least, with proper communication to workers and opt-in features, companies can collect real-time data from the XR-based solution—such as employee actions, behaviors, responses, and biometrics—enabling insight-driven business decisions that prove training effectiveness.

Delivering

Accenture creates safe, engaging, and effective training with VR for utility company.

Like most companies, utilities have traditionally had to strike a balance between the effectiveness of “in-the-field” training versus the cost-effective scalability of classroom learning. One major utility company teamed with Accenture to develop a VR solution that enables user-friendly immersive training in overhead power line inspections. The experience allows trainers to explain inspection concepts more easily while providing immediate feedback for each participant. The success of the prototype has led the organization to instantiate an XR factory to continuously prioritize and create new training modules for deployment in its training centers.



Unlocking:

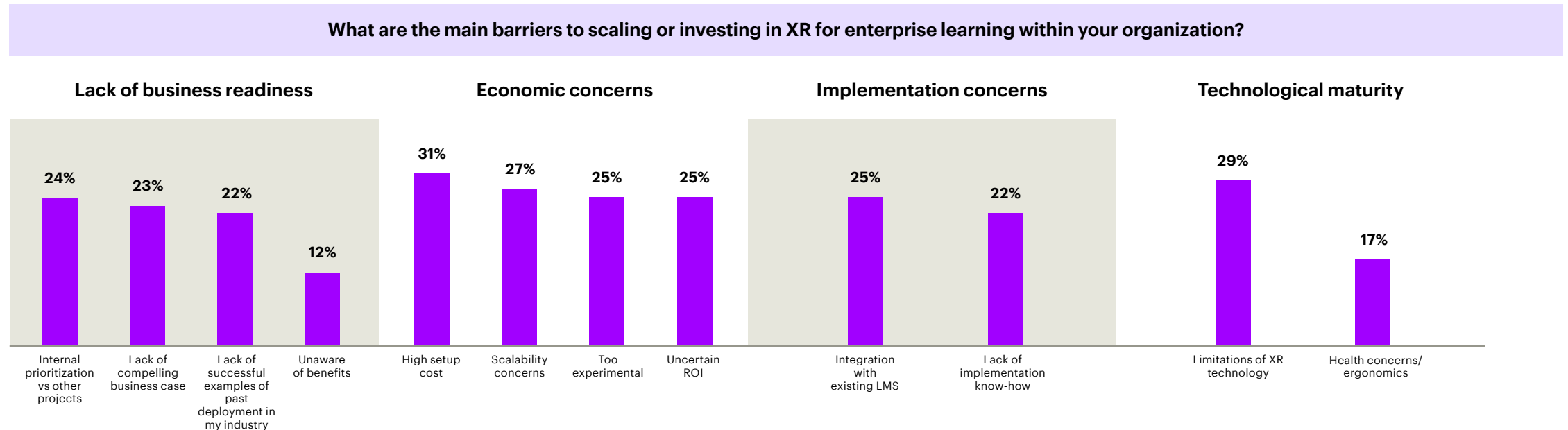
Full Value of Immersive Learning



Unlocking

Despite the myriad benefits available from immersive learning through XR, some enterprises are still hesitant to invest in and scale solutions. Others are only willing to experiment, developing XR experiences for a single use case or silo in the organization. Our research shows there is no single barrier holding companies back on transforming their Learning & Development function, rather it's a combination of factors: lack of business readiness, economic concerns, implementation worries or technological maturity (see Figure 2).

Figure 2: Perceived barriers vary across organizations and can be addressed with the correct vision and strategic direction (Source: Accenture Immersive Learning survey, 2021)



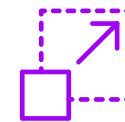
Unlocking



Fortunately, these barriers can be resolved with a well-articulated vision and strategic direction for an integrated and continuous immersive learning environment, built on three design levers—scope, scale, and agility. The real value of an enterprise XR opportunity will be unlocked by driving breadth and depth in these Learning & Development initiatives at speed.



Scope



Scale



Agility



Scope

Companies must broaden the scope of their XR learning initiatives from one-off employee training to the entire employee experience. This includes synergizing learning loops throughout the organization across different functions such as product design, development, strategy, and innovation—which, in turn, uncovers data-driven insights to power cross-

function business decisions. Expanding the scope of headset use cases can also modernize the employee experience and improve return on investment. Examples include onboarding, recruiting assessments, collaborative events (townhalls, “ask the leader” sessions), mental/physical wellness, or fitness applications.

Unlocking

Case Study

The Indiana Department of Child Services pulled this lever to address the agency's high attrition rate. Nearly 50 percent of staff were leaving within their first two years of service, costing \$72 million annually. With Accenture's help, the department deployed a VR training system customized for human services and later extended the solution into use cases for recruiting and assessments. Broadening the scope compounded the business benefits. In the first phase, the solution provided an immersive training and feedback platform for existing employees and analyzed the captured data to create a baseline profile for an ideal candidate. Subsequently, the agency was able to simulate field experiences for candidates to set job expectations and assist HR in picking the right candidates through behavior tracking. Using the solution, the Indiana Department of Child Services reduced staff turnover by 31 percent.⁷

7. MIT Ideas Made to Matter, How virtual reality can help improve employee retention <https://mitsloan.mit.edu/ideas-made-to-matter/how-virtual-reality-can-help-improve-employee-retention>





Scale


The recursive cycle of data capture, analysis, and feedback on many learners offers real-time and accurate performance benchmarking. It also provides companies with the flexibility to amend strategies and training designs quickly.

Unlocking

Case Study

A large retail company demonstrated the effectiveness of this lever when it collaborated with one of Accenture's ecosystem partners—STRIVR, an immersive learning platform provider, by piloting a VR-based training program across 200 training academies in just six months. Associates using the VR solution reported 30 percent higher employee satisfaction, scored higher on tests 70 percent of the time, and logged a 10-15 percent higher rate of knowledge retention. Following this success, the retail company expanded the program, rolling out 17,000 VR headsets across nearly 4,700 stores across the US. Their associates could take much of the self-paced training at a convenient time without the need for travel to a training facility or receive visits from instructors. To date, the retail company and Strivr have deployed more than 60 VR training modules to train nearly one million associates spanning customer service, operational efficiency, interpersonal skills, safety, and skills assessment.⁸

8. Accenture interview with Derek Belch – CEO, and Brian Murphy – Vice President, Strategy, at STRIVR



“From pilot to enterprise-wide deployment, immersive learning is one of the most impactful ways to upskill and reskill employees at scale. With nearly unparalleled engagement, VR provides organizations with the ability to deliver more consistent, measurable, and performance-driven training programs across a widely dispersed workforce in a fraction of the time of traditional training methods.”

Derek Belch, CEO of STRIVR



Agility

As outlined in the Accenture Technology Vision report, a company's technology architecture will increasingly become a competitive differentiator. The technology choices made today will affect what businesses can do in the future, including how they build and reuse agile solutions with flexible components. In Learning & Development, an agile technology stack that supports

XR capabilities will make it possible to respond quickly to changing learning requirements, build relevant employee skills, and remain competitive by delivering the right lessons to employees at the right time. One example is to establish a mobile device management (MDM) platform to manage and onboard XR devices in the enterprise more easily.

Unlocking

Case Study

With COVID-19, healthcare organizations needed both ventilators to treat patients and talent who knew how to use the devices. But hiring new staff or training existing staff would take too long. Sheba Medical Center applied this agility lever using Microsoft HoloLens headsets to train its physicians, biomedical engineers, and nurses on how to operate the ventilators.⁹ Workers could see a hologram-like rendering of a ventilator superimposed on their real-world view, including instructions to guide the process of operating the physical ventilator in front of them.

9. Sheba, Wearable Augmented Reality Technology Used at Sheba for Teaching Medical Staff <https://www.shebaonline.org/wearable-augmented-reality-technology/>



Apply:

Recommendations for XR-Based Reinvention



Apply

With a vision and strategy in place, the steps to achieving sufficient business integration (scope), workforce reach (scale) and future flexibility (agility) depend on making key decisions across four areas—infrastructure, hardware, ecosystem, and people. Since these are cross-functional decisions that impact the entire enterprise, it is important that CHROs/Learning & Development function and CTOs/IT function collaborate closely throughout the journey. Accenture recommendations and our survey results for each area include:

Infrastructure

Hardware

Ecosystem

People

Infrastructure

Enterprises should build a relationship between the devices (located at the edge of the network) with cloud computing to drive agility and flexibility. In addition, they should use the cloud as a centralized scalable platform to generate insights from collected data and the edge devices for managing real-time, pre-defined content.

77 percent of executives believe that integrating XR devices with the broader cloud and data strategy within the company can make the XR solution more powerful than if implemented in siloes/individual teams. Yet only 33 percent are involved in building a cloud strategy to enable seamless, integrated, and scalable business operations and only 28 percent are making use of XR devices in a way that aligns with their cloud strategy. Creating digital twins of physical assets (i.e., 3D models of consumer products like automobiles or shoes or 3D representations of factories or utility grids) and storing this data in the cloud will also benefit all parts of the business.

“Cloud and next-generation mobile networks will democratize immersive applications, transforming the way we work, learn and play. We will increasingly see users run the most complex VR and AR experiences from a remote server in the cloud and stream them across mobile networks to any device.”

Greg Jones, Senior Manager of Global Business Development and XR at NVIDIA

Hardware

Broaden the scope of the existing IT strategy to make XR devices an integral part of the technology portfolio. MDM platforms linked to these devices are continuing to evolve; platform choice will be important both for existing functionality and future opportunities. To improve adoption, allow employees to access both publicly available apps of their choice, as well as the enterprise app stores to install critical AR/VR applications and security patches. Due to the decrease in cost of XR hardware, the technology is more accessible than ever. Additionally, renting XR hardware and leveraging an XR Center of Excellence is an option to reduce capital expenditure risk.

Nearly a third (31 percent) of respondents said they are involved in defining device management policies to enable procurement, management, and maintenance of new category of devices (e.g., XR). This needs to be a much higher number to achieve a successful XR-based initiative in the enterprise.

Apply

Ecosystem

Build a vision for the future of learning in collaboration with a digital transformation expert and other learning ecosystem players. In addition, focus on organizational development so that the common vision resonates across departments and stakeholders.

41 percent of executives agree that integrating with an existing learning management system (LMS) is the biggest challenge when implementing XR for enterprise learning. LMS platforms vary in maturity and linking a bespoke proof of concept will be costly. Develop a big-picture plan for immersive learning, determine the right mix of ecosystem partners, and select the appropriate LMS platform(s) to smooth implementation and reduce costs.

“Building a connected learning platform—one that is seamlessly integrated into existing workflows and enterprise systems—is a key success factor for immersive learning. An integrated platform helps gather crucial information to track programs and amend strategies. Engaging a digital transformation partner with deep expertise in this area is advisable.”

Pascual Jiménez Martínez, HR Director, Alstom

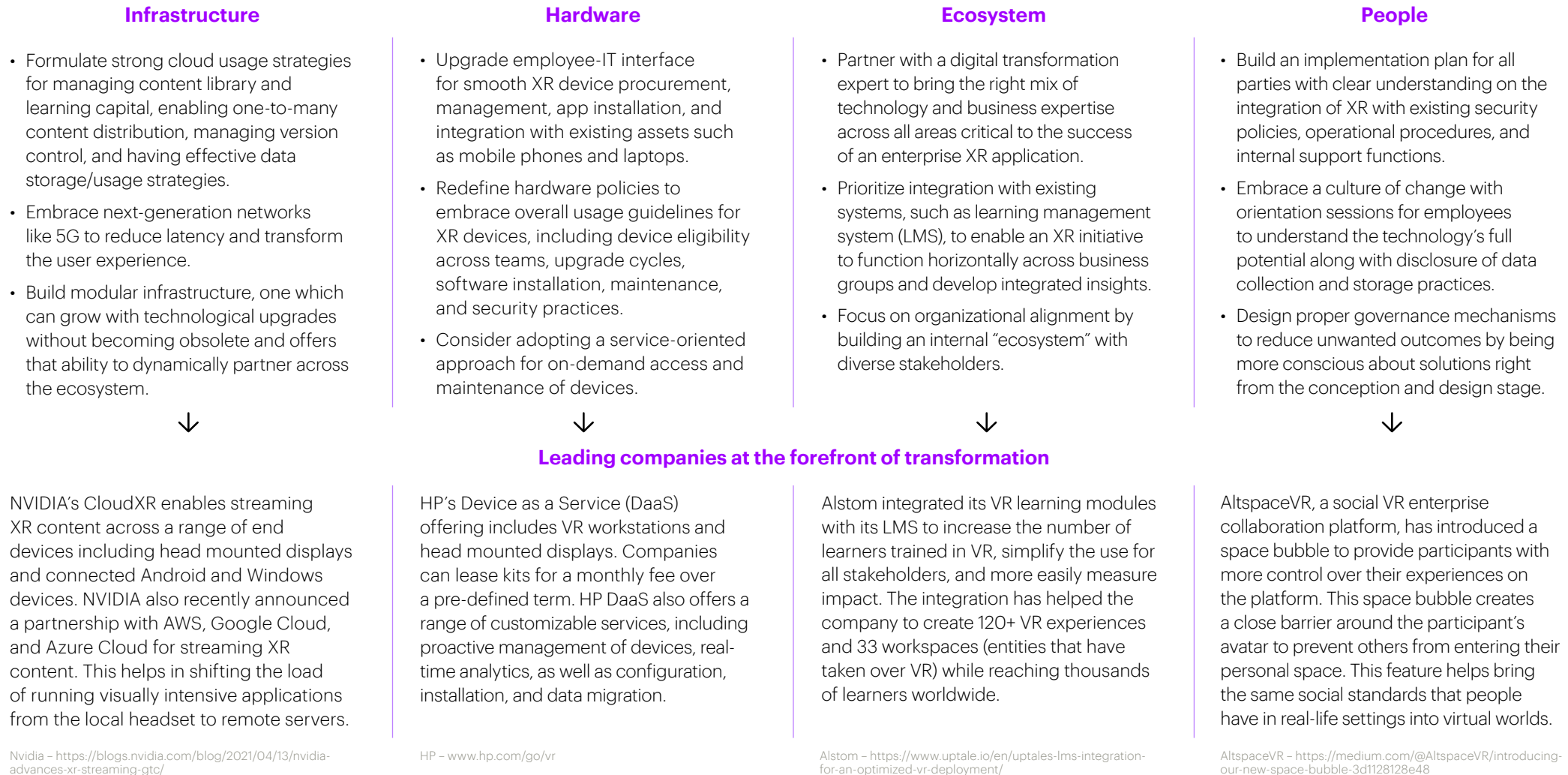
People

Data privacy is essential, and enterprises must drive responsible XR by developing the necessary safeguards to treat data sensitively. They should also build transparency and trust with employees by designing solutions and using ethical practices. Infusing company culture and social opportunities into the experience will help engage employees and appeal to the future workforce.

The vast majority (79 percent) of respondents agree that managing security and privacy aspects of their employee data is one of the most critical aspects of their XR implementation strategy. Additionally, 75 percent agree that having tight data safeguards in place will instill greater confidence in their employees to adopt XR.

Apply

Figure 3: While each company’s journey is unique, here are suggestions for how to achieve the recommendations across these four areas, including market examples to illustrate how leading companies are proceeding. (Copyright Accenture)



Engage:

**Experienced Partner
to Scale XR**



76 percent of our survey respondents say it is much faster and easier to scale XR implementation efforts if they partner with experts.

Success takes much more than adding XR tools to an existing workflow. Immersive learning and XR technology provide unique experiences that require a deep understanding of specific requirements and best practices.

Your partner should offer knowledge on the latest developments and requirements for XR technology, coupled with hands-on expertise in setting up scalable immersive learning solutions and creating a platform that builds the right culture and sense of community. Look for a partner with a unique combination of business and technology experience mixed with industry and functional experience.

Engage

Ideally, your digital transformation expert should also have the following capabilities to help speed your organization's journey:

- **Strategy:** Ability to understand your organization's priorities and larger strategic vision to build a strong XR business case, developed on a clearly defined business outcome. Your partner should help you envision a forward-looking human capital strategy, including instructional design and deep learning capabilities, rather than a myopic view of implementation. Ideally your strategic approach should include executing a proof of value within one or two business units followed by establishing an enterprise Center of Excellence to enable rapid scaling across the organization.
- **Compliance and Security:** Expertise to advise and adopt on the right levels of security and risk compliance, including but not limited to privacy, device management, content, and data security, as well as capabilities to record and track user behavior.
- **Analytics:** Experience to capture and analyze data including human body performance, user interface elements, responsiveness, and 3D interactions. This might include collaborating with and integrating capabilities from partners specializing in the space.
- **Hardware:** Knowledge about how to design the ability to access and launch applications on any device to train alone or in groups, with or without instructor guidance. Your partner should bring a solid understanding of where specific use cases fall on the continuum (AR, VR or MR), determine which types of devices should be explored, and establish strong device management policies.
- **Software:** Ability to bring together the right mix of diverse talent needed to build an immersive application, which includes skillsets from technology, graphic design, animation, psychology, visual development, and XR platform expertise.
- **Content:** Strengths in content creation, consumption, and management (including reusability of 3D assets) since immersive technology requires unique creation skills and toolsets, along with diverse means of consumption and quality management. Your partner should navigate the challenges posed by XR content, storage, and delivery, which may require custom-built solutions.

Succeed:

In the New Reality



The pandemic and its aftermath have changed our world irrevocably. Employee expectations have evolved, and companies must go beyond in both reskilling/newskilling and deeper engagement strategies.

Fortunately, reengagement with employees is achievable through reinvented learning and development experiences. Enterprises that adopt Immersive Learning with XR at scale can magnetize talent, engage them fully and develop a workforce of the future. A strategic vision, cross-functional collaboration within the enterprise, and the right decisions and partnerships across the ecosystem will make the journey a success.

Building Accenture's immersive learning metaverse

XR can help connect new joiners and build a sense of community during a time when people can't physically be together. For example, Accenture developed One Accenture Park, using Microsoft AltSpaceVR. The park is a shared virtual space that enables immersive onsite experiences, interactive showcases and hands-on demonstrations. In support of hybrid work models and the future of work, One Accenture Park enables our people to use Oculus headsets to go beyond flat-screen video conferencing into 3D interactive environments alongside colleagues and clients. As part of this reimagined experience, Accenture created a new joiner orientation that includes hybrid scenarios to help new people meet in an environment modeled after a "world's fair". The new joiners learn about Accenture's purpose, how we deliver value to our clients and the communities we serve, and also experience social "water cooler" moments to connect and network.

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About Accenture

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services—all powered by the world’s largest network of Advanced Technology and Intelligent Operations centers. Our 514,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities. Visit us at www.accenture.com.

About Accenture Extended Reality (XR)

Accenture’s Extended Reality practice helps our clients imagine, create and deliver innovative XR experiences at enterprise scale. Merging physical and virtual worlds to create individual and multiuser experiences allows humans to become empowered actors on their journeys to learn, work and purchase products and services. Current initiatives include immersive learning for mobile workers, reimagining the customer experience with XR, designing immersive virtual meetings, and providing workers with dynamic access to data. To learn more, visit: www.accenture.com/extendedreality.

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We would like to thank the following executives for their insights during our interviews:

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Talespin – Kyle Jackson, Co-Founder and Chief Executive Officer

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About the Accenture Immersive Learning Survey, 2021

Between February and March 2021, Accenture Research conducted a global survey of 306 senior executives in five countries (China, France, Germany, United Kingdom and United States) to understand their organization's investment in and use of extended reality technologies for workplace training. Respondents represented more than 12 industries from companies \$1 billion or more in global revenue.

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