



The Aragon Research Globe™ for Corporate Learning, 2020

Learning Becomes Strategic in a Post-Pandemic World

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SUMMARY

The ninth annual Aragon Research Globe™ for Corporate Learning examines 18 major learning providers. In a remote work environment, enterprises need to ensure that employees and customers have access to the basic and advanced learning journeys and training to help them succeed in their roles and tasks.

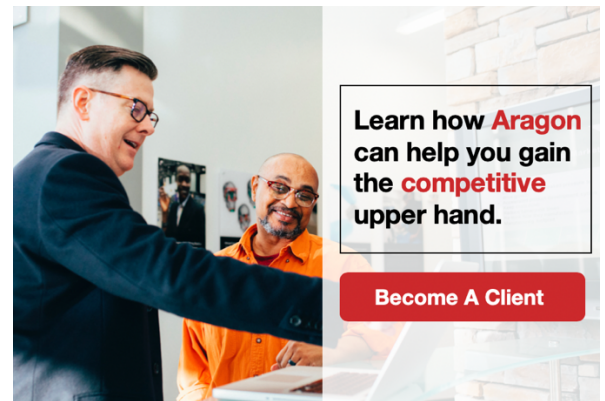


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Key Takeaways

1. Enterprises need to modernize their approach to learning, leverage off-the-shelf training content, and develop new learning paths that leverage custom content.
2. Enterprises should embrace microlearning and video learning.
3. Mastery-based learning, which features a focus on certifications, should be used for key jobs, including, but not limited to sales, service, and support.

Introduction

In the post-pandemic world of remote work, skills development is still vital and needed more than ever before. Because so many people are working remotely globally, this is reducing the ability to do training via the physical classroom. And it is increasing the demand for digital learning.

For most of last year and 2020, the big demand has been for off-the-shelf courses to enhance the skills of both knowledge workers and people who have specific jobs, such as sales, service, nursing, etc. The challenge has been to package and deliver the right content to the right people, and that is why so many learning providers have updated their platforms to have a better learning experience.

As we have seen in vertical markets such as sales enablement, the need for daily training via microlearning is growing. Many high-consequence jobs put tremendous pressure on users to make the right decisions on the job. Microlearning helps to solve this.

Business units continue to take more control of the delivery of knowledge to their people. This is due to the fact that there is tremendous pressure to perform in this digital transformation era.

Trends, issues, and challenges that affect business today can and will change tomorrow, and associates need access to tools that enable troubleshooting and performance improvement. Part of the solution will include analyzing providers that offer a modern user experience and can deliver just-in-time learning. The Aragon Research Globe™ for Corporate Learning, 2020 evaluates 18 technology and service providers that allow enterprises to manage and deliver all forms of learning.

Employee Engagement Is About Skills and Knowledge

People at the office and at home have a strong desire to learn every day. Aragon refers to the overall talent management market as employee engagement. Today, part of the challenge of

keeping associates working at the enterprise is keeping them engaged. Learning is a key part of employee engagement and it starts the day that the associate is hired.

While there is a lot of focus and hype in the market around skills, for the enterprise it is really about the ability to perform a set of tasks and to do them well. This means that while there are skills required, there is also knowledge, and that is why enterprises need to look at their learning requirements as much deeper than just a set of skills-based courses. That said, people are curious; offering them the ability to learn new skills is part of the employee engagement playbook.

The Current State of Learning Experience and Content

Today, many providers are refreshing their learning platforms so that they offer users a better learning experience. These learning experience platforms (LXPs) are really portals that are designed to deliver the right content to the user at the right time.

While the market has shifted from an admin-centric LMS perspective to an employee-centric learning experience perspective, the challenge remains to provide great learning content that meets the needs of horizontal skills and job-specific skills.

In the last year, the learning content market has not changed significantly. What has changed is many more learning providers now have large libraries of courseware that you can select from. Aragon suggests caution relative to some of these libraries, as they provide good-enough skills training, but not enough for many people to do their job completely.

The Race to Learning Journeys

A learning path is a new term that used to be referred to as a form of curriculum. For business unit leaders as well as L&D professionals, the need to develop robust courses that are joined together in a learning path is one of the challenges that many enterprises have not addressed.

While licensing a library of off-the-shelf courseware helps with generic job skills, such as software applications training, and basic knowledge skills for a number of jobs, such as sales and entry-level management, the pressure that many business units face is that courseware is not enough to develop a high-performance team.

Understanding Mastery-Based Learning

Mastery-based learning focuses on the skills needed to perform certain roles. It often involves levels of capabilities and a curriculum that starts with basic proficiency and goes all the way to expert classifications.

Mastery-based learning involves a process in which associates or customers have had the knowledge of their job-critical skills concretely verified. The method of verification

varies, but it often involves passing both a knowledge exam as well as a series of hands-on exercises. Mastery-based learning borrows heavily from the approach used to certify professionals in certain industries—medical, legal, and IT—and applies those principles to corporate and non-profit sectors.

This type of approach takes more work, but the payoff can be substantial. This is the reason that this approach has started with high-stakes industries first. Several of the providers in this report, BenchPrep, CrossKnowledge, D2L, and Oracle, enable a mastery-based approach.

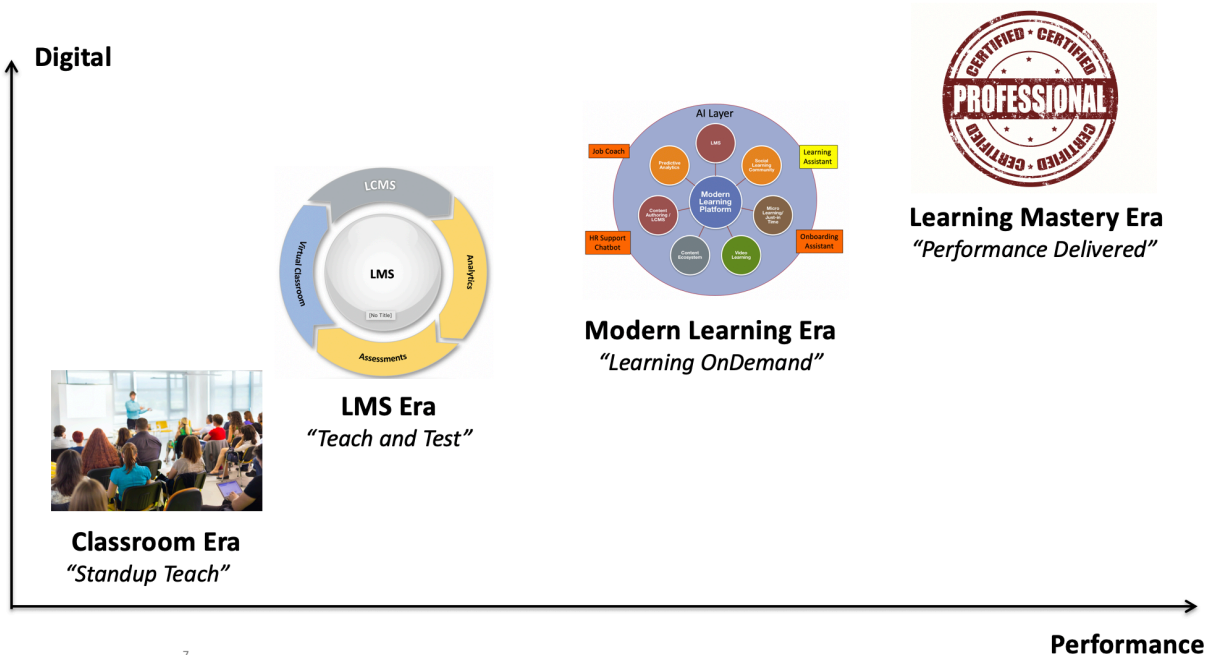


Figure 1: The eras of learning and the shift to learning mastery.

The Race to Skills and Competency Starts with Content

Content, which is part of a curriculum, has made a huge comeback in learning because users are demanding more access to better courses. The shift to learning providers that enable access to all kinds of courseware has emphasized content as a must-have feature for enterprises. In 2018, learning pivoted to focus more deeply on content and courses that provide content, including courses in the form of shorter segments. This demand has forced learning providers to partner for, acquire, or refresh learning content. Given the growth of content, there has also been increased interest in providers that can manage course content from a variety of sources, including video. Both are integral components of the modern learning platform (see Figure 1).

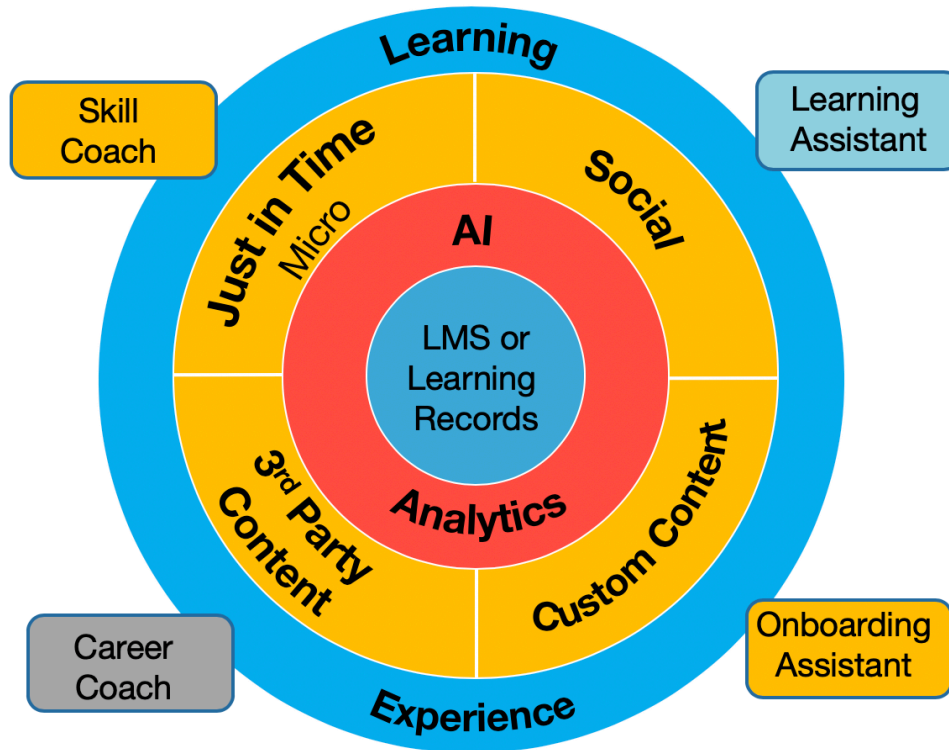


Figure 2: The learning market is shifting to a focus on learning experience and will be infused with learning assistants.

Leaving the LMS Era—Shifting to the Knowledge-Based Workplace

We have reached a point in the evolution of the learning market where enterprises understand that highly-trained associates have a huge impact on the bottom line. Learning management systems, while important for tracking course completions and compliance, are just part of what Aragon refers to as modern learning.

Besides employee learning journeys, the race for better customer engagement and training has been on for some time. This is also referred to as the extended enterprise, which is all about enabling and training customers how to use the provider’s products and services. All of this means that the enterprise needs to look at the learning that is needed by different people, both employees and customers. In the overall view of employee and customer experience, learning is a vital component that is no longer being overlooked.

Aragon sees five critical learning journeys that need to be addressed:

1. Onboarding

New employees and new customers need to be onboarded and have the basic knowledge to get started. It is important that the initial onboarding experience be positive. Video can play an important role here.

2. Basic Professional Skills

This is where there has been a lot of focus on having a library of courses to address individual professional skills development. Associates, particularly younger ones, are looking for this type of training so they can advance faster. Enterprises need to be aware that a significant amount of skills-based training that is available is cursory—it often does not meet the needs for a power or advanced user.

3. Job-Specific Learning Paths

For specific role-based training, the business unit usually takes responsibility for this area. For example, in sales or service, those organizations will ensure that sales training or service training is delivered, ensure that salespeople can sell, and ensure that service staff can repair equipment.

This is where a mastery-based learning approach can come into play. Certifications based on a set of skills (e.g., basic selling, account management, advanced client engagement) can be a valuable way to confirm competency.

4. On-the-Job Training—Coaching Becomes Key

Once some of the training has been accomplished, it is time to put the knowledge to work on the job. This helps to reinforce what has been learned. Managers play a key role here to coach at the right time. Some of the learning offerings available monitor activities and suggest actions to reps directly or tell the sales manager who they need to spend time with.

5. Just-in-Time—via Microlearning

The need to have learning reminders—to bring knowledge to the forefront—is what microlearning is all about. Today, many providers don't offer microlearning and may end up partnering with vendors such as Axonify or Qstream.

Licensing and Building Modern Learning Content

The question that often comes up about learning content is whose responsibility it is to develop or procure training content. This singular issue has often led to incomplete training

programs. Today, while L&D is racing to add more professional skills-based content, the business unit often owns the responsibility. Due to COVID, business units are in a race to digitize legacy classroom courses that also need modernization.

The availability of modern training content opens up the choices for enterprises. In many cases, video learning, microlearning, and in-depth training courses all need to be part of a learning path. Getting the right mix is important. Today, enterprises are just discovering the power of both microlearning and video learning.

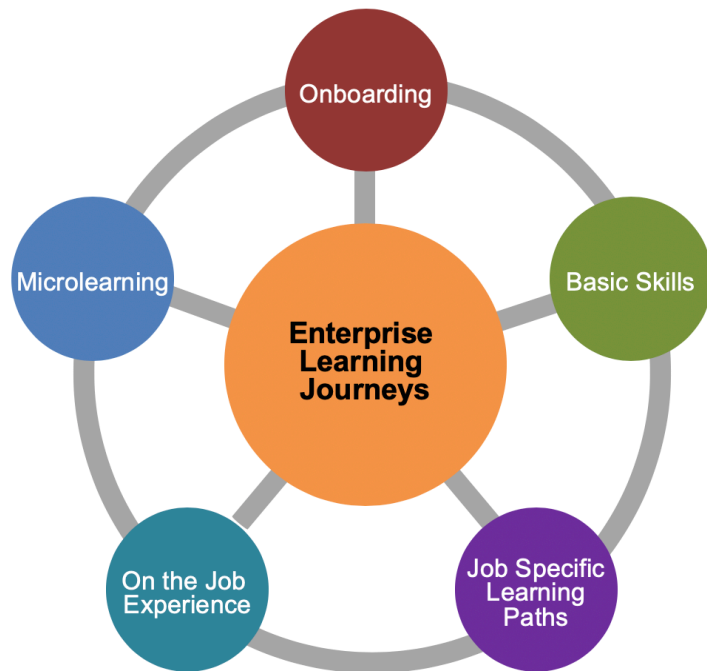


Figure 3: Learning journeys are now becoming continuous and not one-time events.

One of the key evaluation criteria for learning providers needs to be the ease of adding content to their learning platform. This includes the ability to purchase content upfront or via the vendor's app store or marketplace. The store/marketplace allows for ease of locating the partner apps and, in many cases, drives the purchase of apps.

High-Performance Teams Require Advanced Learning Journeys and Custom Content

As we mentioned above for mastery-based learning, developing high-performance teams in the enterprise means that learning journeys need to be tailored to specific jobs and specific sets of skills. Typically, for many of these jobs, off-the-shelf content will not suffice. Enterprises need to embark on a program to develop advanced learning journeys

for each job level, and then develop learning content that will be required to master that particular role competency.

Microlearning and On-Demand Know-How delivery

The challenge with any job or sport is memory recall. In high consequence jobs and roles, microlearning is making a difference. Microlearning refers to the delivery of knowledge in small chunks at the time of need. Nearly every job can benefit from microlearning. In sales, microlearning has become a requirement in some industries, such as life sciences. We see microlearning becoming more critical going forward in aerospace, defense, healthcare, retail, and manufacturing.

Testing the comprehension of just-in-time learning, quizzes, and microlearning can help a sales representative or call center rep instantly revisit critical information. The big idea for just-in-time learning is that advanced applications can recognize upcoming activity and provide learning nuggets for knowledge retention related to a specific task, such as a sales call.

Communities—Enabling People to Share Their Tacit Knowledge

For both employees and customers, learning-based communities are a great way to share best practices in the form of discussions and content sharing (such as videos of best practices). While communities have been described in the past as social learning, enterprises should not overlook the opportunity to leverage this form of information sharing because of its high impact for customers.

As content and people-based analytics continue to get smarter, communities where tacit knowledge is shared will become a rich source of answers to common questions.

Learning Experiences on Any Device—at Any Time

Mobility of professionals is a given, and, while for most, delivering mobile content is not an issue, this is not a requirement to overlook. The ability to deliver training content as well as microlearning and video learning on mobile devices is now a must-have requirement.

More providers are making their mobile learning experiences richer and customizable. One of the best ways to increase employee and customer engagement is to enable learning anywhere. The best way to do that is to have a native, mobile app learning experience.

Video Learning in a Post-Pandemic World

Remote teaching has made a comeback during the pandemic as we prepare to enter what we call the post-pandemic era. Live video classes are the norm in higher education and in the corporate world. Access to recordings becomes key, as does improved video search, and the ability to edit a class to add online quizzes.

User-generated video content is also easier to share and can be part of a custom learning path. Users can also replay key scenes of either a class recording or a how-to video over and over again until they are sure they understand and can move forward. Replay accessibility makes video one of the fastest ways to learn a new task or procedure.

Because of the ease with which people can learn with video in their everyday lives, they will come to expect—and demand—this same form of learning in their professional lives. Enterprises would be wise to acknowledge this trend of video becoming the preferred learning method, which this research note will continue to explore.

Look to learning providers who can easily support video or who have a roadmap to provide it. Many providers offer integrations with leading enterprise video providers.

Learning Assistants Are Still a Work in Progress

While we have predicted the shift to learning assistants for the last 2 years, today most HR departments have learning support chatbots to help associates with answers to questions. However, there are a number of firms that have learning chatbots in development, and a few, such as Oracle and Skillsoft, have already shipped them.

Many conversational AI platforms now support the importation of knowledge bases so that when a new chatbot/agent is developed, the knowledge base can be loaded right into their intents. Aragon feels that enterprises should ask their provider what their roadmap for conversational AI is. Failing that, enterprises should discuss their needs with an Aragon analyst.

Prediction: *By YE 2023, 50% of enterprises will offer a learning assistant to help employees and customers with their training needs.*

The Search for Better Predictive Analytics

Recommending courses for employees to take is becoming the new normal. Enterprises are on the hunt for more predictive learning experiences and that often starts with a better understanding of what is happening with learners in the enterprise.

Aragon feels that we are at the beginning of the predictive learning era in which courses and content are recommended and delivered to students on demand. When machine learning is added to a learning platform or learning community, better training recommendations can be made. A growing number of providers in this report offer predictive capabilities.

This means that better learning experiences are on their way—however, the onus is on the enterprise to understand the product roadmaps of providers to ensure when these capabilities will be available.

Prediction: *By YE 2021, 30% of learning analytics offerings will be tying performance to the knowledge level of the associate.*

The Post-Pandemic Learning Playbook Starts with Planning and Content

The post-pandemic playbook for learning means stepping back and developing a plan for training that leverages virtual classrooms instead of physical classrooms. Going beyond basic skill training should be the focus for every business unit, and that may mean digitizing old content and refreshing it at the same time. Employees want to be engaged and they desire better training. By developing custom learning journeys that leverage the modalities discussed above, enterprises will have more engaged employees, and customers will be more engaged and often more loyal.

Learning platforms will power innovation and allow enterprises to do more with their investments in a shorter amount of time. Enterprises looking to innovate their knowledge delivery should look to extend their offering by integrating it with other applications.

The Aragon Research Globe™ for Corporate Learning, 2020 (As of July 23, 2020)



Figure 4: The Aragon Research Globe™ for Corporate Learning, 2020.

Leaders

Cornerstone OnDemand

Cornerstone OnDemand (CSOD) announced its merger with Saba Software in March 2020. The \$1.395 billion deal has CSOD founder Adam Miller transitioning as CEO to Saba CEO Phil Saunders. The combination of Cornerstone and Saba makes for one of the largest install bases of talent management and learning in the industry. With traditional LMS and LXP functionality, a full set of talent modules, as well as robust content authoring via Cornerstone Create, Cornerstone is a full modern learning platform that can deal with onboarding, basic, and advanced training requirements.

Cornerstone also features a growing focus on content. Enterprises have a full set of learning and talent offerings to select from. In particular, the modern interface enables Netflix-style learning channels support, enhanced collaboration, and the ability to deliver user-generated video and off-the-shelf content. The Cornerstone content offering, Content Anytime, combined with the CSOD and Saba Modern Learning platforms, positions the newly integrated company to offer both basic skills and advanced learning journeys. Cornerstone Insights offers predictive analytics dashboards across the talent management suite, including learning. With both Cornerstone and Saba under one roof, enterprises have more learning choices than ever before.

Strengths

- Talent and learning platform
- Compliance enablement at scale
- Video and mobile learning
- Content offerings and delivery
- Content creation
- Predictive analytics
- Marketplace for apps

Challenges

- Reconciling two overlapping product families

CrossKnowledge

CrossKnowledge is owned by John Wiley & Sons. It has been improving its learning capabilities with its learning experience platform, which has been enhanced over the last year. CrossKnowledge also features a robust set of learning content that it also licenses to others. CrossKnowledge's off-the-shelf set of content offerings features 20,000 courses in 17 different languages that focus on employee development, leadership development, sales excellence, and onboarding. Its success in learning outsourcing and custom content development has allowed it to attract a growing number of brands.

CrossKnowledge's BlendedX offers the ability for clients to create highly efficient training programs with assessment and survey capabilities that are fully mobile-enabled. The CrossKnowledge Learning Suite offers students the ability to acquire relevant skills highly efficiently through these structured training programs, alone or in groups. CrossKnowledge has been able to leverage its learning suite platform to take advantage of the growing demand for extended enterprise training for customers and partners. Part of the appeal is the platform, the content, and the portal customization features. CrossKnowledge is well-positioned to deliver the full set of learning content and experiences needed in a post-pandemic world.

Strengths

- Learning outsourcing
- Learning suite
- Content authoring
- Content library
- Sales use case
- Management and leadership development

Challenges

- Market awareness in North America

Degreed

Degreed has continued to win in the market as demand for skills development via learning has continued to grow. It has continued to push its learning experience platform that offers skills management and measurement tools; and now, curated learning experiences that include on-the-job development opportunities like tasks, projects, and stretch assignments as well as content. In June 2020, Degreed announced that it had received an additional \$32 million to accelerate its product roadmap, with a focus on data science, skill analytics, and career mobility. This is on top of the June 2019 \$75 million, bringing total funding to \$182 million.

Degreed aggregates content from multiple sources, including CrossKnowledge, LinkedIn Learning, OpenSesame, and Skillsoft, as well as thousands of paid and public sources, like blogs, videos, and podcasts. It delivers these skills-focused content offerings in a modern, easy-to-digest learning experience platform, which is fully mobile. The Degreed mobile app makes it easy to take courses or other learning resources on the go, and its personal signup option is a great way for enterprises to get started.

In December 2019, Degreed announced the acquisition of Adepto to help match people with specific skills to jobs as well as projects. Degreed has limited LMS features, but it also has seen success due to its partnership with LMS provider LearnUpon. Degreed is now a global provider that allows learning to occur in 27 languages and geographies around the world.

Strengths

- Learning experience
- Content partnerships
- Skill certification
- Mobile app

Challenges

- Awareness outside of North America

Meridian Knowledge Solutions

Meridian Knowledge Solutions continues to win in both corporate and government markets, offering a complete modern learning platform. The Meridian LMS™, focuses on delivering best-in-class learning solutions that are fully mobile-enabled. Meridian LMS™ capabilities include responsive design, intuitive user experience, deep certification functionality, eCommerce support, gamification, microlearning, and career development. Meridian helps enterprises with its focus on core learning, compliance, and training outside of the enterprise. Meridian's Spring 2020 release features modernized catalog pages, including in-line content play, a new SCORM course player, robust xAPI support, and new certification history and workflows. Meridian makes it easy for customers to create their own content with their own set of authoring tools or via integration with solutions such as dominKnow.

Meridian leverages extensive partnership networks—which include OpenSesame, BizLibrary, Percipio, and other content authoring leaders. With its heritage of selling to defense, federal, and state and local government buyers, Meridian in 2020 has expanded the number of resellers who can address these markets.

Strengths

- Extended enterprise
- Content creation
- Compliance (government & commercial)
- Mobile-first learning
- Integration capabilities (APIs & web hooks)
- Scalability & security
- Cloud or behind the firewall
- Extensive support for multiple domains

Challenges

- Market awareness outside of the US

Oracle

Oracle continues to invest in Oracle Learning Cloud (OLC), its modern learning platform that is offered as part of its talent management cloud. Oracle Learning Cloud offers certifications, learning paths, course and course offerings, digital eLearning, assessments, and instructor-led training that can lead to mastery-based certifications. OLC also integrates with the Goal Management and Career Development modules of the Oracle HCM SaaS suites. OLC also offers communities for learners to share knowledge, including video. Oracle's support for video learning allows enterprises to share the growing library of user-generated content.

Oracle continues to offer native Skillsoft and LinkedIn Learning integration and supports Webex and Adobe Connect for virtual classes. Oracle has continued its robust investment in AI, for both content recommendations, as well its Adaptive Intelligent Apps (AI) focus in HCM and its overall conversational AI focus, which includes chatbots for its recruiting application. Oracle's complete shift to the cloud, its makeover of its entire talent platform, and its continued investment in learning make Oracle one to evaluate in learning.

Strengths

- Video learning
- Communities
- Investment in AI
- Overall strength of HCM and talent suite
- Extended enterprise

Challenges

- Awareness outside of Oracle install base

Skillsoft/SumTotal

Skillsoft, which announced a pre-arranged Chapter 11 filing to reduce debt, offers one of the most robust sets of learning content, powered by its Percipio learning platform, which it has continued to expand. Skillsoft has microlearning video content and 700+ skill-based and role-based learning paths. It has added compliance, leadership development, and digital transformation content to its Percipio platform, which now supports multiple languages.

SumTotal Systems is the wholly-owned subsidiary that offers a full LMS, talent management, and talent acquisition platform and offers a complete talent development solution with learning at the core. Its modern and engaging user experience leverages machine intelligence and all of Skillsoft's content to address the needs of skill development and employee engagement. In addition to Skillsoft, SumTotal continues to add to its library of out-of-the-box content connectors. In 2019, SumTotal announced the support for LinkedIn Learning and EdX content, as well as Coursera, Harvard Business Publishing, and Udacity.

Skillsoft helped to pioneer learning assistants with its Percipio Embedded Learning Synchronized Assistant (ELSA) and SumTotal Intelligent Assistant (SIA), which helps learners with specific training needs. Both SumTotal and Percipio offer an intuitive and personalized experience with AI-driven recommendations based on user interests and online behaviors. Both SumTotal and Percipio also support the hosting of custom content (e.g., AICC, SCORM, various formats) for clients, and can aggregate content from different free/paid sources. Skillsoft has continued to expand and enhance what is one of the largest off-the-shelf content libraries, and the demand for learning content continues to grow.

Strengths

- Install base
- Consumer-grade user experience
- Learning assistant (ELSA and SIA)
- AI personalization and digital badges
- Mobile iOS and Android apps
- Video-based microlearning
- Learning journey
- FedRAMP certification
- Robust content library
- Flexible deployment model

Challenges

- Migration of Skillport install base to Percipio

Contenders

Blackboard

Blackboard is one of the leading providers of LMS systems to higher education and K-12 markets. Blackboard Learn is the company's flagship LMS and it integrates with its other solutions, including Blackboard Collaborate, which offers full virtual classroom capabilities. Its primary focus areas in corporate learning include associations, governments, and sales organizations. In government, Blackboard Learn is FedRAMP-certified for low-impact SaaS on AWS GovCloud, which has helped it win a number of US government accounts.

In 2020, Blackboard announced the sale of its Blackboard Open LMS platform to LTG Technologies. It rebranded its Moodle offering as its Blackboard Open LMS. Last year, it also expanded its content partnerships to include VitalSource, a provider of digital content and textbooks. This adds to Blackboard's existing integration with Lynda.com for off-the-shelf courseware and now supports integrations with content management providers such as Dropbox and many more.

Strengths

- Built for education
- Collaboration tools
- Predictive capabilities
- Virtual classroom
- Accessibility
- Mobile solutions
- Full suite of learning products and solutions

Challenges

- Known mainly in the K-12 market

PeopleFluent

PeopleFluent, which is part of the Learning Technologies Group, offers an LMS, LXP, and learning analytics. PeopleFluent has continued to focus on creating technology that makes “learning” permeate throughout the business and that supports the complete employee experience. PeopleFluent has done this primarily through integrations with other components from the LTG portfolio, including Watershed LRS (advanced analytics), Instilled (visual and collaborative learning), Gomo (authoring), and Rustici Software (native course launcher).

Further, third party integrations with content providers, including Go1 and OpenSesame, have allowed for the inclusion of aggregated content from multiple sources. Finally, PeopleFluent continues to lead with innovative video content creation, delivery, sharing, search, and embed tools. PeopleFluent has created a rather fluid way for companies to embed content from anywhere and export and embed content to anywhere and still track learner metrics—formally and informally.

Strengths

- Video learning
- Social/collaboration capabilities
- Vertical market expertise
- Analytics
- Strength of overall talent management suite

Challenges

- Explaining the recent product integrations and product additions with a comprehensive PeopleFluent story

SAP SuccessFactors

SAP SuccessFactors offers one of the leading talent management platforms on the market. SuccessFactors offers Learning and Collaboration via SAP Jam and SAP Content Stream, powered by Skillsoft. SAP SuccessFactors Learning focuses on employee development and SAP Litmos solutions drive customer experiences. For all focus areas, SAP learning solutions can help to automate learning assignments that are tied to compliance and create better employee and customer experiences by creating knowledgeable people who can be successful in their jobs.

SAP Content Stream was new in 2019 and replaced a partnership with Degreed. SAP also offers SAP Enable Now, its services offering for custom content development. SAP SuccessFactors has a large learning install base, and its partnership with Skillsoft helps to meet the needs for skills development across all industries and sizes. Today, SAP offers 500+ curated learning paths, or channels.

SAP SuccessFactors offers mobile learning for anytime, anywhere access—natively built and secure out of the box. It also offers a new digital assistant for SAP SuccessFactors, which is available as part of its beta program and creates an additional option to humanize the user experience with an AI chatbot.

SAP SuccessFactors's strategy with HXM and for learning is to encourage an open ecosystem so organizations can take advantage of new innovations and easily integrate the best combination of solutions to make their employees successful.

Challenges

Strengths

- Platform scalability
- Overall talent and HCM focus
- Skillsoft partnership
- Learning functionality
- Courseware integration
- Marketplace app integration

- Focus on learning versus talent and HCM platforms

Innovators

Axonify

Axonify focuses on frontline workers with its modern learning and communications solution that combines AI-based adaptive learning capabilities with gamification. Axonify focuses on training frontline employees, such as retail and grocery associates, contact center agents, and field sales reps, as well as plant and logistics workers across a variety of industry verticals. Axonify has continued its partnership approach, building off of early success with the SAP app marketplace with new partnerships with Kronos, the Retail Doctor, and Automotive Retail supplier MSX. Axonify also added OpenSesame to its growing list of content marketplace partners.

Axonify Impact™ offers advanced analytics that uses AI and big data to measure the impact of training for programs delivered through Axonify's platform. Axonify's focus on continuous daily training reinforcement makes it an ideal choice to drive frontline employee engagement and performance.

Strengths

- Microlearning
- Analytics
- AI-powered adaptive learning
- Video- and question-based training content
- Gamification and training engagement
- Mobile device support
- Focus on retail associates
- Focus on sales and contact center

Challenges

- Market awareness outside of North America

BenchPrep

BenchPrep is a Chicago-based company focused on mastery-based training for enterprises and associations to ensure high performance. BenchPrep offers two core products. BenchPrep Ascend™ is a scalable solution for delivering personalized experiences and upskilling learners. In June 2020, BenchPrep introduced BenchPrep Engage™ to help businesses move beyond point-in-time transactional learning with regularly-spaced education cycles. Enterprises can define personalized pathways for their learners that correspond to their preferred learning style and understand the current state of learning through BenchPrep's dashboards, which are dynamically updated.

BenchPrep goes to market directly and offers enterprises the ability to white label and customize their software. BenchPrep also sells to training providers who want to monetize learning, whether in a B2C or B2B model. The unique B2B functionality allows training providers to extend learning to their customers through extended enterprise user administration, content propagation, analytics, and reporting. With the need for increased job skill competencies, BenchPrep's focus on mastery-based learning makes it one to watch.

Strengths

- LMS capabilities
- Mastery-based learning approach
- Mobile app
- White label
- Upskilling
- Reporting

Challenges

- Market awareness

Cegid

In addition to its stronghold in the French CPA and ERP markets, Cegid Group's international development continues to focus on omnichannel retail solutions as well as payroll and HR management, which includes a major focus on learning. The Cegid talent portfolio includes learning, recruiting, performance, succession planning, compensation, and analytics. In September 2019, the company acquired Meta4, the leading HCM provider in Spain, significantly expanding Cegid's HR footprint in Southern Europe and Latin America.

Cegid offers a modern learning experience that includes the ability to offer custom learning paths. Thanks to a recent UX/UI redesign, these learning paths' functionalities have been significantly improved. Cegid's Learning and Development Platform is a full LMS and also supports video learning as a core offering, which enhances the overall approach to social learning. Cegid offers off-the-shelf content via partnerships with OpenSesame and others. It also offers the ability to create simulations, which is an important content type for its core healthcare and retail markets. The Cegid PeopleVision Analytics offering leverages big data, incorporates predictive capabilities, and provides insights across the talent modules.

Strengths

- Learning features and portal
- Talent management suite
- Learning paths
- Dashboards and analytics
- Content partnerships
- Video learning

Challenges

- Balancing focus on retail vs. talent management

D2L

D2L targets organizations that care about engaging people in learning to achieve business results. D2L has been a leader in the higher ed marketplace for 20 years and has successfully extended its learning offerings into the associations and corporate markets. D2L Brightspace provides an engaging experience for the learner with a particular focus on video learning, mastery-based learning, and social feedback. Brightspace Core makes it easy to create engaging content and access courses from any device. Brightspace also focuses on skill and job mastery with personalized learning via automated learning paths. It also offers easy-to-use content creation tools and templates for learning administrators, instructional designers, and subject matter experts. Brightspace supports social learning and assessment, content creation and curation, adaptive learning pathways, and integrated video across the platform, keeping learners engaged and motivating them with awards and badges that recognize and showcase their progress. D2L meets the needs of custom content creation by enabling SMEs to create short videos and share videos with a community of their peers.

Brightspace Performance Plus offers an enhanced set of analytics and in-depth analysis of learning path progress by associates. D2L supports data visualizations, intuitive dashboards, and integrated workflows, making it easier to gather, report, and make decisions based on learner experiences. Brightspace Engagement Plus offers extended enterprise features and the ability to seamlessly add interactive, gamified learning experiences directly within the platform. D2L has been expanding its corporate footprint with associations, Fortune 500 customers, and continuing education. Although corporate is the company's highest growing segment, it still has its largest success in higher education, where the company started.

Strengths

- Learner experience
- Mastery-based learning
- Content creation and curation
- Video capabilities
- Analytics
- Content and technology integrations

Challenges

- Balancing focus on higher ed vs. corporate markets

Docebo

Docebo offers a modern learning offering that excels at social learning. Its Discover, Coach, and Share offering allows users to share knowledge with each other and with external users. Its offering has a full feature set and a modular design, and it continues to win new accounts in EMEA and North America. In 2020, Docebo added LogMeIn's GoToTraining to enable more enterprises to do remote virtual classroom instruction to its 35+ native integrations and connectors.

Docebo continues to leverage AI to make intelligent course and content recommendations for learners and platform administrators. The Docebo Content Marketplace supports LinkedIn Learning and a new partnership with GO1. Docebo has multiple content packages to meet the off-the-shelf content needs of enterprises. Docebo also has a native integration with Salesforce, which will help it meet the growing demand for sales coaching and learning.

Strengths

- LMS capabilities
- Social learning
- Mobile app
- MOOC builder
- Coaching

Challenges

- Balancing OEM vs. direct sales

Inkling

Inkling has continued to build momentum with large global enterprises and sophisticated brands through its focus on providing a mobile-first, modern learning platform for distributed workforces. One of the unique capabilities of Inkling is its support for the creation of highly interactive and visual content for on-the-job learning that commonly serves two main needs: (1) providing real-time performance support around strategic and mission-critical content, and (2) replacing legacy operation manuals, training guides, and job aids for operations that often involve repetitive tasks. This ability to offer quick reference access to microlearning content anytime, anywhere, and on any device is helping Inkling develop a strong reputation as an ideal solution to power operational agility —which it refers to as “Learning at Workspeed”—something customers are finding increasingly important in these times of accelerated digital transformation.

In October 2019, Inkling announced a new Inkling Learning Pathways product that enables a more guided learning experience with learning paths, gated steps, targeted assignments, and role-based dashboards. Inkling’s core product, Inkling Knowledge, enables dynamic content creation and distribution for all learning content and organizational knowledge, including intelligent search, making it ideal for just-in-time performance support and content that is always current. Inkling Learning Pathways streamlines the learning process to improve learner engagement, performance, and information retention, allowing managers to easily manage training assignments, verify trainee skills, and measure results. Customers can also use Inkling’s Learning Connector to easily surface Inkling content into their LMS or LXP, avoiding the need to create and manage SCORM packages and resulting versioning issues. Inkling also offers Inkling Advanced Analytics and a mobile operations platform called Inkling Collaboration.

Strengths

- Learner experience
- Content creation and curation
- Microlearning
- Operations use case
- Sales enablement use case
- Video content support
- Content and technology integrations

Challenges

- Awareness outside of North America

NovoEd

NovoEd, which is wholly-owned by Devonshire Investors, the private equity arm of Fidelity Investments, added acting CEO, Scott Kinney, who also leads the education technology team for Devonshire. NovoEd continues to focus on high-impact collaborative learning experiences for large global enterprises, executive education providers, and training organizations. In April 2020, NovoEd announced that Wilson Learning had agreed to leverage NovoEd to deliver digital learning to its growing client base. NovoEd's main use cases are developing organizational capabilities, including leadership development, onboarding, design thinking & innovation, and diversity & inclusion.

Creating collaborative, social learning experiences that transform in-person training into a digital, collaborative format for enterprise capability building is what NovoEd is well-suited for. NovoEd offers an authoring environment that allows for the fast creation of learning content. Content created can then be delivered by NovoEd across PCs, tablets, and phones. AI-based usage tracking allows users to see others' activity and what is trending in their learning community. NovoEd also enables enterprises to take new and existing learning content and build the right learning paths.

Strengths

- Modern learning experience
- Social, team-based learning
- Mobile app
- Content authoring and curation
- Dashboards & analytics
- Collaborative learning
- Integration with content and video libraries

Challenges

- Market awareness

Qstream

Qstream offers a microlearning platform that has grown out of the life sciences market and is being adopted by enterprises in broader verticals and for horizontal use cases beyond sales training. This is because Qstream focuses on just-in-time knowledge delivery to increase skill proficiency. When combining scientifically proven spaced learning with the testing effect best practices (scenario-based Q&A challenges, repetition, real-time feedback, peer interaction, and game mechanics), the learner is able to recall information and apply newly learned skills on the job sooner. Qstream assists enterprises with professional services that include content development best practices, instructional design services, content review, program setup and launch, reporting and analytics, and strategic consulting to help get the best learning results.

Qstream offers a simple, question and answer based approach to knowledge delivery, which includes game mechanics, giving knowledge workers the right information at the right time to do their jobs. Qstream makes a great addition to traditional LMS deployments due to its ability to reinforce knowledge, create meaningful behavioral change, and provide managers with real-time data on an individual's learning needs to focus their coaching efforts and prove an ROI on their learning investments.

Strengths

- Microlearning platform
- Just-in-time knowledge delivery
- Life sciences install base
- In-depth proficiency and assessment analytics
- Scenario-based, job-specific learning
- Enterprise-grade mobile capabilities
- Professional services
- High user engagement

Challenges

- Market awareness outside of North America

Specialists

Gyrus Systems

Gyrus Systems offers GyrusAim Learning Cloud, its LMS-focused learning solution. GyrusAim offers a modern interface that includes gamification and a responsive mobile HTML5 interface. Besides the enterprise, Gyrus supports the extended enterprise use case with support for multiple e-commerce platforms for customers to purchase the training they need along with bundled assessments. Gyrus also has an API platform to enable integration with third-party applications.

In April 2020, Gyrus announced a partnership with GO1, an off-the-shelf content provider that aggregates over 100 different content providers. Besides GO1, Gyrus partners with OpenSesame and VADO for off-the-shelf courseware. It also partners with dominKnow for courseware authoring. With support for over 15 languages out of the box, Gyrus supports the needs of a growing enterprise.

Strengths

- LMS capabilities
- Dashboards
- Skills-based learning approach
- Language support
- Growing content partnerships

Challenges

- Market awareness

Aragon Advisory

- Besides the learning experience, enterprises need to ask their learning providers for roadmaps that show future R&D investments in areas such as microlearning and video learning.
- Enterprises need to develop a full learning content strategy that can deal with both basic skills and the learning paths needed for specific jobs.
- Enterprises need to realize that in most cases, they will need more than one learning provider to meet their needs.

Bottom Line

The learning market is shifting to a complete focus on knowledge delivery. While that has always been the goal, the focus on technology has taken away from the focus on learning outcomes. Modern learning is about providing better customer and employee engagement. Blending learning platforms with basic and advanced training content is now the new race. Business leaders as well as learning and development professionals should focus on the need for content and for knowledge delivery, especially when it comes to microlearning. This focus may mean adding new learning providers into the mix.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared, regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer Experience:** Feedback on the product, installs, upgrades, and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?

- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

The Aragon Research Globe™ for Corporate Learning, 2020 will help clients differentiate the many vendors that offer tools to let enterprises manage and deliver all forms of learning.

The inclusion criteria for this Aragon Research Globe are:

- **Revenue:** A minimum of \$4 million in primary revenue for learning products or services (LMS, LCMS, classroom, authoring) or a minimum of \$15 million in revenue in a related market (talent management, collaboration, or learning content courseware).
- **Shipping product:** Must be announced and available.
- **Customer references:** Vendor must provide customer references in each region where the vendor does business.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe™ process. Aragon's analysis is based on its research and use of other valid sources including:

- Publicly available information
- Discussion with enterprises that use the product

Non-participation by technology providers in the Aragon Research Globe™ process does not affect their inclusion in this research note. The inclusion criteria listed in this research note is the determining factor.

Inclusions

The following vendors were new to this year's Aragon Research Globe:

- **BenchPrep**

Exclusions

The following vendors were excluded from this Aragon Research Globe:

- **Area9 Lyceum**, a spinoff of Area9, offers a learning platform that enables adaptive learning.
- **EdCast**, based in Mountain View, focuses on microlearning and offers just-in-time capabilities, such as GuideMe.
- **IBM** is focusing more on its Watson Talent offerings, including but not limited to Career Coach.
- **Workday** is one of the fastest-growing cloud providers of human capital management and financial management solutions.