



The Aragon Research Globe™ for Corporate Learning, 2021

Knowledge as a Catalyst for Employee Engagement and Operational Excellence

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Topic: Learning, Employee Engagement

Issue: Who are the vendors that are making a difference in learning?

September xx, 2021 | Research Note 2021-X



SUMMARY

The tenth annual Aragon Research Globe™ for Corporate Learning examines 18 major learning providers. In a hybrid 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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TABLE OF CONTENTS

Introduction.....	3
Learning Is Shifting to Become Part of Employee Engagement.....	3
The Learning Market Is Poised for Change.....	4
Virtual Classrooms and Video Learning in a Post-Pandemic World.....	4
TikTok for the Enterprise: The Rise of Pattern Based Microlearning that leverages Video	5
Learning Experience Is Really About Content Delivery	5
Prescriptive & Predictive Learning Journeys.....	5
Understanding Mastery-Based Learning	6
Enterprise Performance Is Dependent on the Quality of the Learning Courses Being Delivered.....	7
Learning Ecosystems and Enabling a Knowledge-Based Workplace.....	8
Licensing and Building Modern Learning Content	9
Microlearning and On-Demand Know-How delivery	10
Digital Work Hubs and Communities Will Enable Knowledge Graphs to Be Built.....	10
Questions & Answers Delivered by Learning Assistants.....	11
The Search for Better Predictive Analytics.....	11
The Hybrid Work Learning Playbook.....	12
The Aragon Research Globe™ for Corporate Learning, 2021.....	Error! Bookmark not defined.
Leaders.....	Error! Bookmark not defined.
Contenders	Error! Bookmark not defined.
Innovators	Error! Bookmark not defined.
Aragon Advisory	Error! Bookmark not defined.
Bottom Line.....	Error! Bookmark not defined.
Aragon Research Globe Overview.....	Error! Bookmark not defined.
Inclusion Criteria.....	Error! Bookmark not defined.
Exclusions.....	Error! Bookmark not defined.

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Introduction

Given the shift to hybrid work in the post-pandemic world, learning has become a critical part of what is now referred to as employee engagement. The learning of yesteryear, which was really focused on procuring learning management systems (LMS) has completely shifted to a focus on delivering knowledge through better learning experiences. This tenth edition of the Aragon Research Globe for Corporate Learning evaluates eighteen major providers in the market.

Learning is really about the application of knowledge. The big themes for the next two years are learning content and skills mastery. While in the past, many organizations have raced to license off-the-shelf courseware, going forward they will use a combination of that plus leveraging things such as internally-developed video learning and best practices so that the best knowledge can be shared with the right individuals at the right time.

As we have seen in the sales coaching and learning (SCL) market, the value of consistent and regular knowledge delivery cannot be replaced. While some learning providers can deliver on the promise of microlearning, to date, that has been a missed opportunity for many providers. This suggests that there may be best-of-breed microlearning providers that can augment the current corporate learning platform that's in place.

Business units are taking more control of the delivery of knowledge to their people. This is because there is tremendous pressure to perform in this era of digital transformation.

Learning Is Shifting to Become Part of Employee Engagement

The new battle cry has been and continues to be employee engagement. Part of engagement is onboarding and enhancing an individual's professional skills. For this reason, corporate learning, more than any other capability in talent management is really poised to become part of what Aragon is calling an employee engagement platform.

Employee engagement platforms really put people at the center of focus. It is no longer just about tracking talent; it's about putting people at the center of the conversation and investing in people. One of the fastest ways to improve the organization's performance is to enhance the operational knowledge of the work force. This makes learning much more of a strategic focus than it ever has been, and that is why more organizations are realizing that they must invest more in learning, not less.

People continue to 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.

To achieve operational excellence requires knowledge and knowhow. This 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 Learning Market Is Poised for Change

Given the focus on employee engagement and the need for regular skills enhancement, the learning market is undergoing change. Part of that change is a complete shift to focus more on adding content and content libraries to corporate learning platforms. More and more providers are now offering learning content and courseware as part of their licensing options.

However, just doing this in 2021 is not enough. Learners want to learn differently, and new modalities, such as TikTok and Instagram Reels, are proving to be clever ways to deliver information in what we would call a microlearning format.

Virtual Classrooms and 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. However, there are

new delivery models for video-based learning content that have been popularized by consumer content platforms.

TikTok for the Enterprise: The Rise of Pattern Based Microlearning that leverages Video

One of the reasons for the massive surge in demand for TikTok and for Instagram Reels is that the application adapts to what the user is viewing. This essentially represents a new way to deliver knowledge and learning content by shifting the application's ability to recommend related content that may be tied to a specific job or specific set of skills.

This type of delivery mechanism is ideally suited for rich media such as video how-tos and video roleplays. Additionally, it has been proven that this type of delivery mechanism is highly addictive, and so enterprises are seeking out providers that can offer a TikTok for the enterprise style experience. Initially, Aragon's take is that we expect to see demand in areas such as sales or support where best practice roleplays should become quite popular.

The other big area will be how-tos for service and support. One of the benefits of this medium is that the user can watch the same video over and over again to master the specific skill.

Learning Experience Is Really About Content Delivery

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

While today it is about continuous learning and regular training, the need for an LMS as part of the overall learning platform has not gone away. While off-the-shelf content is flying off the shelves, the challenge remains to provide great learning content that meets the needs of horizontal skills and job-specific skills.

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.

Prescriptive & Predictive Learning Journeys

Learning journeys are still evolving. Aragon sees two distinctive approaches evolving. Prescriptive learning journeys often used to be referred learning curriculum and are mainly predefined courses that users need to master to advance their career. Prescriptive learning journeys, also called learning paths are what enterprise journeys should be building now.

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.

The best learning journeys leverage off the shelf courseware, as well as custom developed courses. Over the last three years, we have seen many enterprises in a race to fill out their courseware library. The challenge here is that many too many firms have signed up for basic skills-based training libraries and the issue of mastery becomes an issue because these courses teach fundamentals but not necessarily the skills needed to complete a set of tasks tied to a role.

Predictive learning journeys are the future. They involve a more adaptive approach where the system is continuously recommending courses tied to an employee's role.

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. Business divisions at enterprises are often responsible for ensuring that associates and partners have mastery—basically that they are certified to do a certain job.

The pandemic brought an intense focus to the mastery-based approach. Remote workers still require a high level of training to become proficient. 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. More providers have shifted towards a mastery-based approach to learning since we introduced this concept last year.

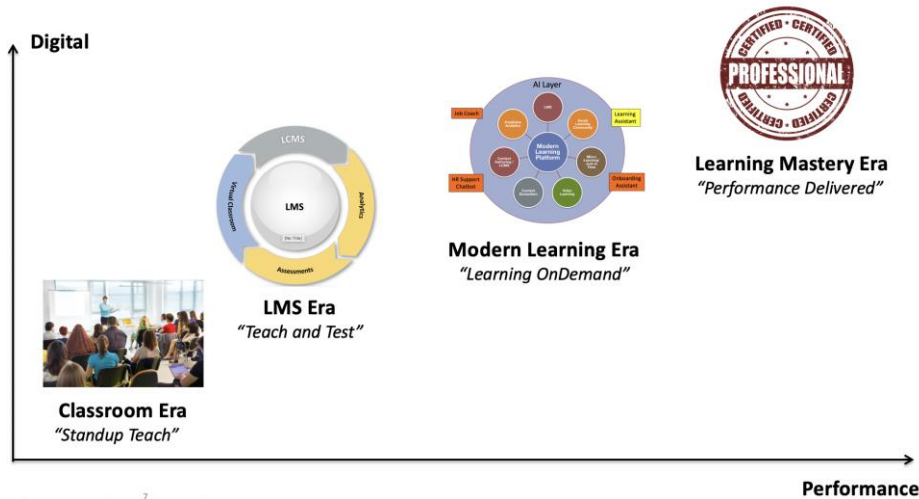


Figure 1: Learning mastery is a growing focus by business executives in enterprises.

Enterprise Performance Is Dependent on the Quality of the Learning Courses Being Delivered

For years, Aragon has recommended enterprises invest in high quality learning content. The challenge is that many enterprises have not met that goal due to average off the shelf courseware. The challenge for enterprises today is to create courses that tap the knowledge of their associates—this is referred as tacit knowledge. The fastest way to run tacit knowledge is through the use of video learning.

Today, video learning content is easy to create, often due to existing user generated videos. Aragon has been discussing learning content for the last seven years, and now, with Tik Tok for the enterprise looming, enterprises have no choice but to embrace their users' and customers' videos. When enterprises do this, they will be able to gain a competitive advantage.

Prediction: by year end of 2024, 40% of enterprises will have deployed their own versions of Tik Tok for the enterprise (60% probability).

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 2).

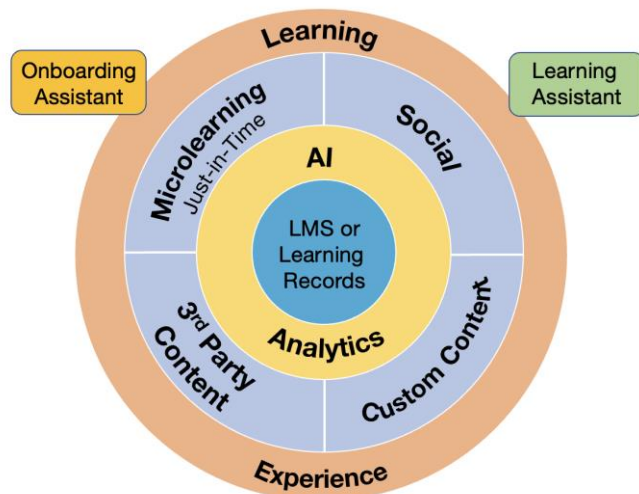


Figure 2: The learning market is shifting to a focus on learning experience and will be infused with learning assistants.

Learning Ecosystems and Enabling a 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.

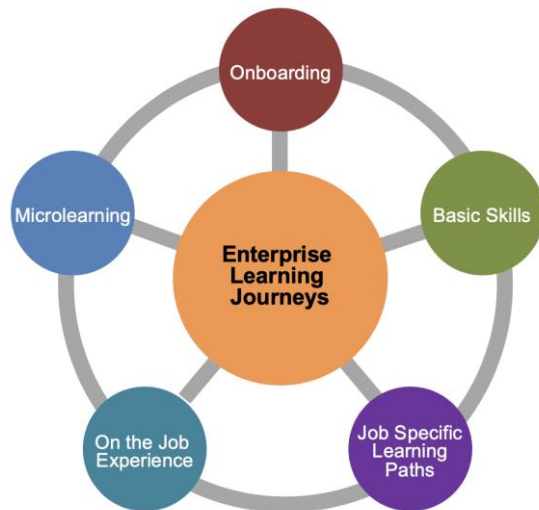
Besides employee learning journeys, the race for better customer engagement and training has been on for some time. This is also referred to as the extended enterprise, which is all about enabling and training customers how to use the provider's products and services. All of this means that the enterprise 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: onboarding, professional skills, job specific skills, on the job training—with coaching, and just-in-time microlearning (see Note 1).

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 choice 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.



Note 1: Critical Learning Journeys

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.

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.

Microlearning and On-Demand Know-How delivery

High-performance enterprises need to have highly-trained associates, and one of the best ways to continuously reinforce learning is to use micro-learning, which offers daily doses of the right content at the right time to reinforce productivity for tasks being done.

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. We'd note that Microlearning is still emerging in the corporate learning market, offered by several providers, including Axonify and Qstream.

As mentioned above, one of the trends in video learning is the rise of TikTok for the enterprise, where user generated content can be shown continuously to users based on topics they like or previous videos they have watched. While no one is currently offering PayPal for the enterprise, we expect that they will over the next few years.

Regardless, Aragon feels that microlearning is here to stay, and that in many cases, enterprises may work with a stand-alone microlearning provider that augments the existing corporate learning provider.

Digital Work Hubs and Communities Will Enable Knowledge Graphs to Be Built

With the advent of AI, software algorithms will be able to recognize information shared by individuals and shared by teams. When people can see a knowledge graph and the information associated with it, they will be able to understand what others have done and learned faster than ever before.

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. Visualization of how work is being done will be delivered by both social and knowledge graphs. While this is a form of analytics, understanding how people and content interact will help business leaders understand the impact of training and learning.

Questions & Answers Delivered by Learning Assistants

While learning development has been slow to embrace conversational AI, the good news is the rest of the enterprise has not. Today, the chatbots are helping customers and employees everyday by answering common questions faster than humans can.

While Oracle, Skillsoft, and SAP are the few to offer chatbots/ virtual learning assistances, Aragon expects a surge of conversational AI offerings over the next two years. 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.

Going forward, the training of virtual agents/chat bots will increasingly be done by both L&D as well as specific business units.

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

Because of enhancements in AI, content analytics is here. In the past, courses were meta-tagged to help users find the courses they were looking for, but not always. Today, with computer vision and advanced analytics, very detailed scenes from courses can be identified so you can see or have delivered the exact courseware that will help you in your job even if it's a scene that is from a longer video.

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 2023, 40% of learning analytics offerings will be tying performance to the knowledge level of the associate (60% probability).*

The Hybrid Work Learning Playbook Starts with Learning Journeys and Continuous Reinforcement

The hybrid work learning playbook means stepping back and developing a plan for training that leverages multi-modal learning journeys, including self-paced courses as well as virtual classroom instruction 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, 2021

(As of September xx, 2021)



Figure 4: The Aragon Research Globe™ for Corporate Learning, 2021.

Leaders

Meridian Knowledge Solutions

Meridian Knowledge Solutions, based in Reston Virginia, and led by CEO Jonna Ward, continues to win grow in its core markets, including public sector, state and local, and extended enterprise. It added a number of new executives in 2021, including Hung Vu as head of product and operations. continues The Meridian LMS™, is a modern learning offering that is fully mobile enabled and offers responsive design, intuitive user experience, certification capabilities, eCommerce support, gamification, microlearning, and career development. Meridian can also be deployed in the cloud or on-premise.

Meridian helps enterprises with its focus on core learning, compliance, and training outside of the enterprise. Meridian's Spring 2021 release features the ability to add branded sub-domains which can allow different parts of an enterprise to offer a personalized experience. Meridian also announced more robust test management features that includes drag-and-drop question management and advanced workflows. 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, Vado and Vivid. For content authoring, Meridian partners with dominKnow. 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.

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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

Aragon Advisory

- A skills-only approach to learning is not enough in a hybrid work world. Mastery-based learning is the new way forward. Business executives need to examine their overall approach to learning mastery.
- Besides developing a robust learning content strategy, enterprises also need to have operational plans to refresh courseware each year.
- 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 has shifted, and it is now focused on skill and knowledge mastery. This makes learning part of the hybrid work ecosystem. While modern learning is about providing better customer and employee engagement, enterprises need to take a step back and examine their current shortfalls in delivering a robust training and learning environment. Business leaders have a major role to understand their approach to learning and need to partner with L&D to ensure the training and learning needs of their enterprise are being met. Given the need for this new approach to training and learning, an expanded portfolio of learning providers may be in order.

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.

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 digital adoption with its flagship offering GuideMe.
- **Infor** offers ERP software as well a Talent Management Suite that includes Learning as part of that platform.
- **Workday** is one of the fastest-growing cloud providers of human capital management and financial management solutions.