



The Aragon Research Globe™ for Corporate Learning, 2021

Knowledge as a Catalyst for Employee Engagement and Operational Excellence

Author: Jim Lundy

Video Producer: Adam Pease

Topic: Learning, Employee Engagement

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

October 7, 2021 | Research Note 2021-37



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.

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.....	11
The Aragon Research Globe™ for Corporate Learning, 2021	13
Leaders.....	14
Contenders.....	22
Innovators.....	25
Aragon Advisory	31
Bottom Line.....	32
Aragon Research Globe Overview	33
Inclusion Criteria.....	34
Exclusions	36

Copyright © 2021 Aragon Research Inc. and/or its affiliates. All rights reserved. Aragon Research and the Aragon Research Globe are trademarks of Aragon Research Inc. All other trademarks are the property of their respective owners. This publication may not be distributed in any form without Aragon Research's prior written permission. The information contained in this publication has been obtained from sources believed to be reliable. Nevertheless, Aragon Research provides this publication and the information contained in it "AS IS," without warranty of any kind. To the maximum extent allowed by law, Aragon Research expressly disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information.

This publication consists of the opinions of Aragon Research and Advisory Services organization and should not be construed as statements of fact. The opinions expressed here-in are subject to change without notice. Although Aragon Research may include a discussion of related legal issues, Aragon Research does not provide legal advice or services and its research should not be construed or used as such. Aragon Research is a private company and its clients may include firms or financial institutions that have financial interests in entities covered by Aragon Research. Further information about the objectivity of Aragon Research can be found at aragonresearch.com

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 put people at the center of focus. It is no longer just about tracking talent; it's about putting people in the middle 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 developing. Prescriptive learning journeys often used to be referred to as learning curriculum and are mainly predefined courses that users need to master to advance their career. Predictive 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 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.

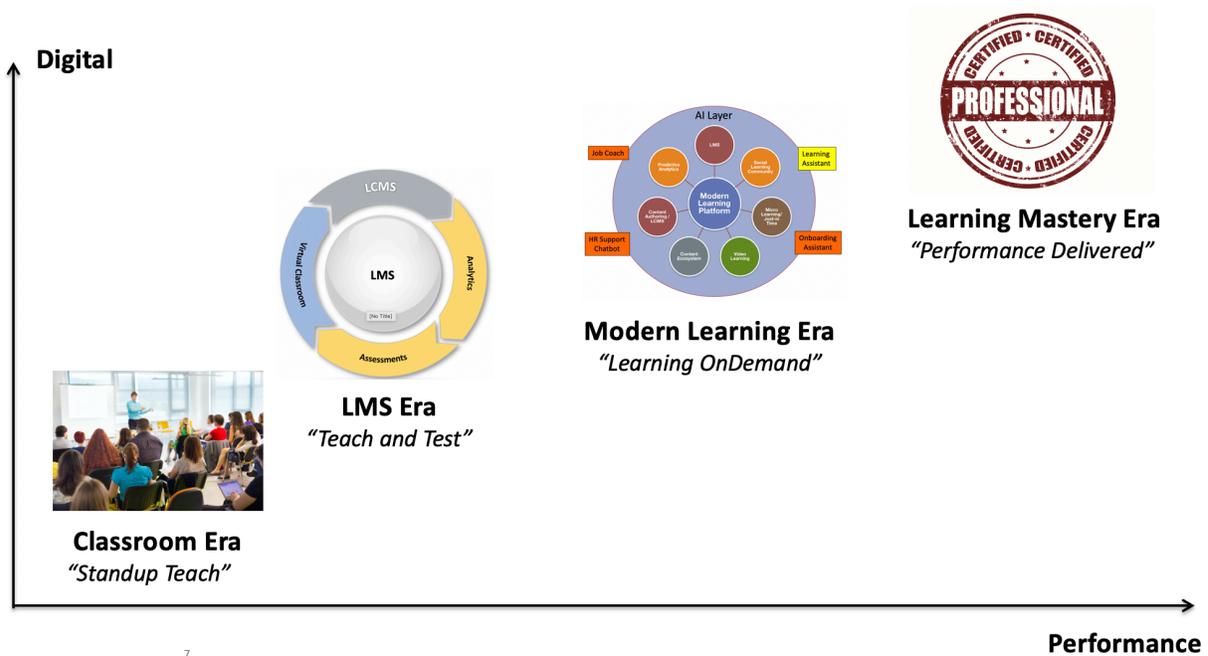


Figure 1: Learning mastery is a growing focus by business executives in enterprises.

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 obstacle for enterprises today is to create courses that tap the knowledge of their associates– this is referred as tacit knowledge. The fastest way to produce 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 TikTok 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 TikTok 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).

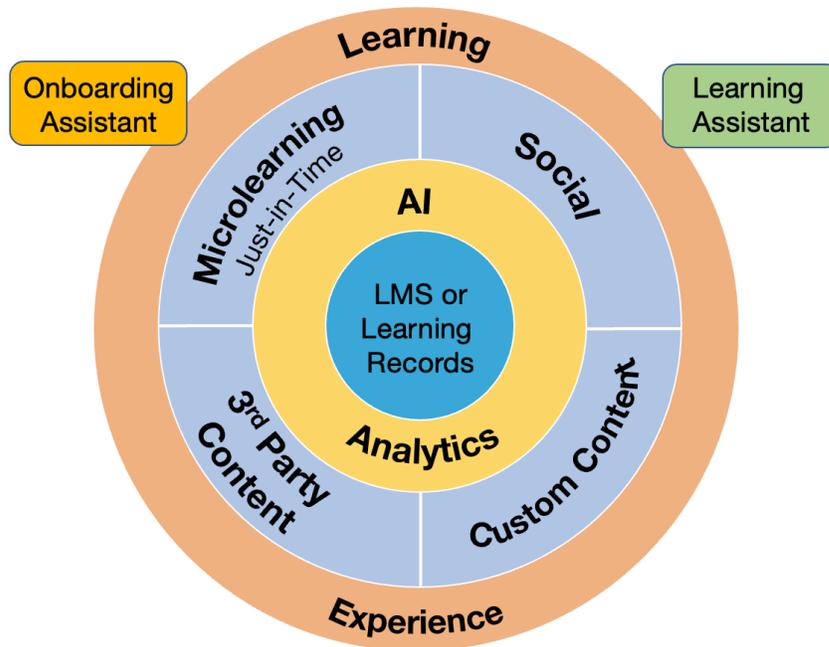


Figure 2: The learning market is shifting to a focus on learning experience and will be infused with learning assistants.

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.



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

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.

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, chatbots are helping customers and employees every day by answering common questions faster than humans can.

While Oracle, Skillsoft, and SAP are the few to offer chatbots/ virtual learning assistances, Aragon is expecting 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 October 7, 2021)

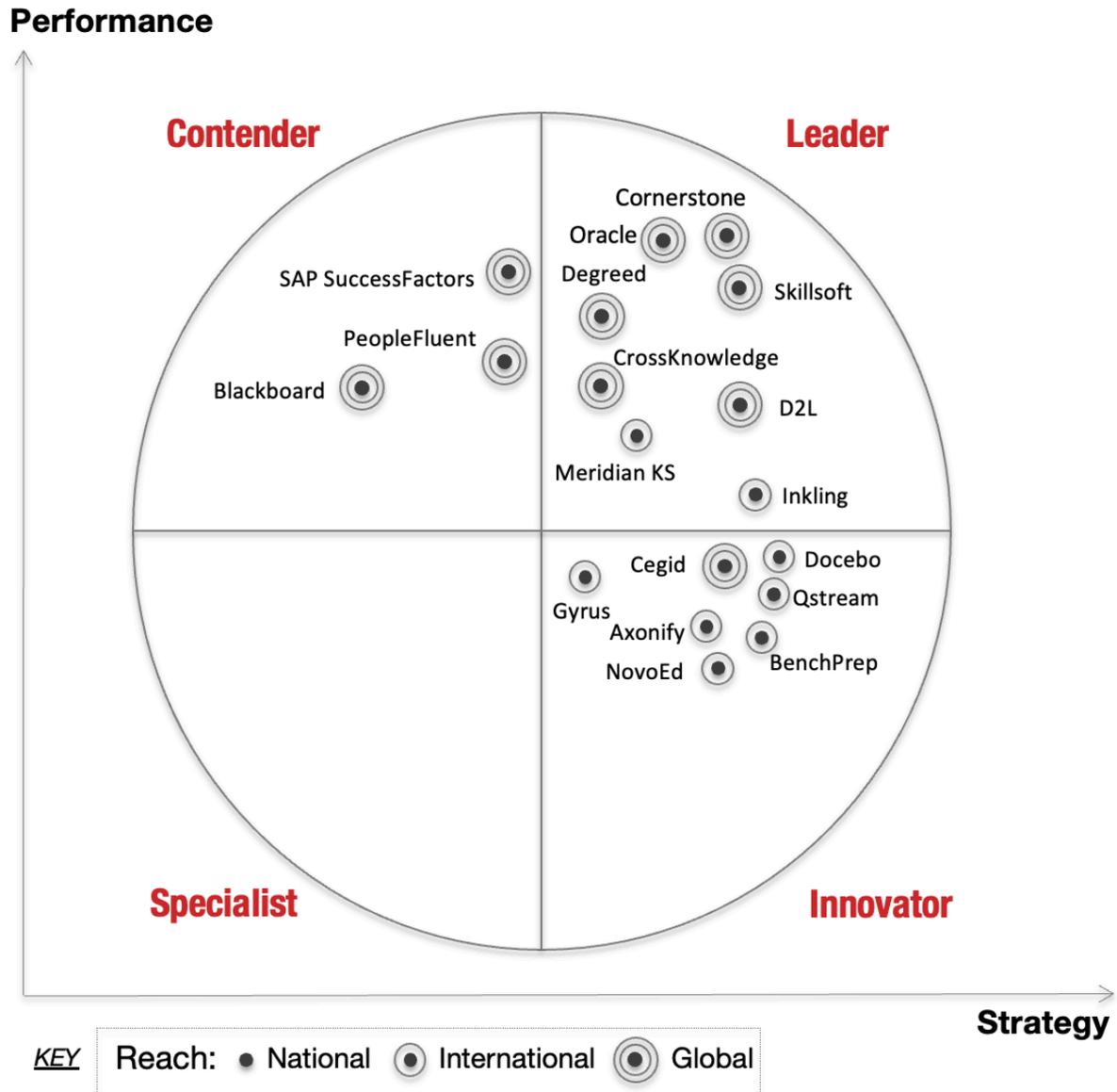


Figure 4: The Aragon Research Globe™ for Corporate Learning, 2021.

Leaders

Cornerstone OnDemand

Cornerstone OnDemand (CSOD), based in Santa Monica and led by CEO Phil Saunders, announced it was being taken private in a \$5.2 billion deal. This comes on the heels of its merger with Saba Software in 2020. In September 2020, Cornerstone announced Ajay Awatramani as Chief Product Officer. The combination of Cornerstone and Saba makes for one of the largest install bases of talent management and learning in the industry.

CSOD offers both LMS and LXP functionality, as well as a full talent management platform. With a focus on end-to-end learning support, CSOD offers the ability to create your own learning content and has been focusing more on reselling learning content. Learning content has become a growing revenue channel for it. 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. With the integration with Cornerstone's Skills Graph, organizations receive a boost to their upskilling initiatives.

Cornerstone has shown increased revenue due to its learning content practice. The Cornerstone content offering, Content Anytime, combined with the CSOD Learning platform, positions the newly integrated company to offer both basic skills and advanced learning journeys. Additionally, Cornerstone Insights offers predictive analytics dashboards across the talent management suite, including learning. Having absorbed Saba, CSOD, with its LMS/LXP and Content Anytime now offers enterprises both infrastructure and learning content to help them focus on their learning needs.

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, a subsidiary of John Wiley & Sons and based in Paris and New Jersey offers a learning experience platform. It has been continuing to expand its content offerings with engaging learning pathways. The CrossKnowledge learning content catalog 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. To expand the ability for enterprises to create their own engaging learning content, CrossKnowledge has partnered with Elucidat which offers an authoring environment for course creation.

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. Over the last year, CrossKnowledge has added over 70 new skill paths that focus on soft skills such as critical thinking, leadership, and personal development. With its learning platform and its growing portfolio of native content, CrossKnowledge is well-positioned to deliver the full set of learning content and experiences.

Strengths

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

Challenges

- Market awareness in North America

D2L

D2L has continued to grow and focus on its four core vertical markets: Associations, Higher Education, K-12, and Corporate. D2L CEO John Baker added new executives to his team over the last year including CMO Alys Scott, a veteran in the HCM industry. D2L Brightspace provides an engaging experience for the learner with a particular focus on video learning, mastery-based learning, and social feedback. D2L's Brightspace platform is a cloud-based learning management system. Brightspace makes it easy to support exceptional learning experiences in person and online by providing educators, learning administrators, and learners with tools. Brightspace also makes it easier to complete assessments and provide meaningful feedback. Learning data and analytics reports are readily available, providing up-to-date information and insights that help answer questions and inform decisions to take action and improve learning outcomes.

With customers in both the education and corporate markets, D2L continues to explore opportunities for synergistic learning and development programs to advance initiatives around upskilling and reskilling the workforce through micro degrees and credentialing. In July 2021, D2L announced D2L Wave, which will focus on providing an entire set of career skills to enterprise associates. D2L Wave will partner with a number of providers, including a number of higher education universities. D2L Wave covers a large number of job proficiencies, including Cloud Computing, general business skills, leadership skills, and more. In addition to D2L Wave, D2L also offers easy-to-use content creation tools and templates for learning administrators, instructional designers, and subject matter experts. Formal courses and certifications are available to employees through a network of academic partners to update and enhance the skills/knowledge necessary to help employees make continuing contributions to the workforce.

D2L has been expanding its corporate footprint with associations, Fortune 500 customers, and continuing education. With its growing industry focus, D2L is well prepared for to meet the needs of higher ed and corporate customers alike.

Strengths

- Learner experience
- Competency-based learning and skills development
- Content creation and curation
- Video capabilities
- Analytics
- Content and technology integrations

Challenges

- Market awareness outside of higher education

Degreed

Degreed named Box veteran Dan Levin as CEO in April 2021. At the same time, it announced a \$153M Series D round of funding. The total funding for Degreed now totals \$335M. Degreed focuses on skills development via learning and on-the-job development experiences. Its approach via Learning Experience has proved to be popular. Degreed 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. The Degreed skill analytics provides a solid set of insights into what people are learning and where the experts are.

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. Degreed has expanded its capabilities to allow for extended enterprise deployments. It now allows for training across organizations, meaning a number of organizations can be connected in one extended enterprise instance of Degreed.

Degreed continues to add basic LMS features such as content hosting, and it adds additional capabilities mainly via 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 measurement and management
- Mobile app
- Market awareness

Challenges

- Dependence on LMS partners

Inkling

Inkling, based in San Francisco and led by CEO Jeff Carr, focuses on providing a mobile-first, modern learning platform for distributed workforces. In 2021, Inkling doubled down on its mobile first approach to learning by updating its mobile apps for iOS and Android. The new mobile experience includes geofencing, voice commands, and support for QR Codes. 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 enables 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. Some of the reasons for Inkling's success are its ability to quickly publish and update critical content at the speed of the business and offer quick reference access to microlearning content anytime, anywhere, and on any device

Inkling Learning Pathways product that enables a more guided learning experience with learning paths, gated steps, targeted assignments, and role-based dashboards. Inkling also launched its new Inkling Connect iPaaS platform that provides pre-built connectors to a variety of learning and operational systems. For example, Inkling's Learning Connector allows enterprises to easily surface Inkling content into their LMS or LXP, avoiding the need to create and manage SCORM packages and resulting versioning issues. In July 2021, Inkling announced a new set of partner-led mobile admin apps that make it easy for enterprises to administer learning on the fly. In 2021, Inkling also released its new InkForms product that enables clients to build operational checklists with embedded learning. Inkling is well-positioned to assist enterprises with their operational learning needs, which continue to grow in a hybrid work environment.

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

Meridian Knowledge Solutions

Meridian Knowledge Solutions, based in Reston Virginia, and led by CEO Jonna Ward, continues to win 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. 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, on-premise, or through a hybrid model.

Meridian helps enterprises with its focus on core learning, compliance, and training inside and 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 to different learning audiences. Meridian also announced more robust test management features that include 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 or Percipio.

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 2021 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 well as its overall Oracle HCM Cloud which saw significant updates over the last year. Oracle Learning Cloud has been updated and it now can offer a personalized learning journey from onboarding to skill development. Oracle now supports micro-learning via its content generation tools. On top of this, Oracle now offers robust course recommendations that can be tailored to each employee or customer—if it is extended enterprise.

Oracle Learning also offers 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 social learning via 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 LinkedIn Learning integration Oracle has continued its robust investment in AI, for both content recommendations, as well its overall conversational AI focus. The Oracle Digital Assistant is part of the Oracle cloud HCM offering, which includes Oracle Learning. This makes Oracle one of the first providers to offer a learning assistant, which will help with onboarding and ongoing skills development.

Strengths

- Personalized learning journeys
- 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's recent IPO was done via a SPAC, and it brings together Skillsoft with its subsidiary SumTotal, and the merger with Global Knowledge, which is known for its classroom and virtual training capabilities. Skillsoft continues to offer 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, including compliance, leadership development & business, and technology & developer, which now support multiple languages. This means that Skillsoft is well-poised to address the demands for learning from a content perspective, whether it be digital or in the classroom.

SumTotal Systems, a Skillsoft brand, offers a full LMS, talent management, talent acquisition, and workforce management platform. This complete talent development solution has learning at the core. In 2021, SumTotal announced that it had added virtual classroom integrations for Microsoft Teams, as well as Zoom. SumTotal has continued to enhance its mobile app for learning delivery. The app was updated in 2021, and the ability to deliver learning content on mobile devices in a seamless fashion helps SumTotal to keep winning new customers. Besides leveraging Skillsoft learning courseware, SumTotal continues to add to its library of out-of-the-box content connectors. SumTotal announced the support for LinkedIn Learning and EdX content, as well as BizLibrary, Coursera, GoFluent, Harvard Business Publishing, HSI Vado Learning, Udacity, and Udemy.

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. With Global Knowledge as part of the overall portfolio, the amount of learning content offered that includes certifications for cloud and many other IT certs, makes Skillsoft one of the largest providers of off the shelf content—both skills and mastery-based content.

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
- Blended learning

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. On September 13th, Blackboard and Anthology agreed to merge. The deal will close before the end of 2021 and Jim Milton, Chairman and Chief Executive Officer of Anthology, will be CEO of the combined company. Blackboard offers Blackboard Learn, its flagship LMS, and Blackboard Collaborate, which offers full virtual classroom capabilities. Outside of its K-16 core focus, Blackboard's offerings for corporate learning target associations, governments, and sales organizations. Blackboard Learn is FedRAMP-certified for low-impact SaaS on AWS GovCloud, which has helped it win a number of US government accounts.

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, a wholly-owned subsidiary of the Learning Technologies Group, is a full talent management provider that offers an LMS, LXP, and learning analytics. Outside of Learning, PeopleFluent offers Performance, Talent Mobility, Compensation, Succession, and Org Charting. PeopleFluent focuses on a learning experience that is delivered 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). In March 2021, PeopleFluent announced a partnership with Visier, to leverage their people analytics platform

PeopleFluent has also seen success in industry verticals, including healthcare and sales training. On third-party content, it integrates with Go1 and OpenSesame. 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

- Market awareness outside of North America

SAP SuccessFactors

SAP SuccessFactors, a wholly-owned subsidiary of SAP, repositioned its overall HCM and talent management offerings as human experience management. SAP SuccessFactors offers Learning SAP Content Stream, powered by Skillsoft. SAP SuccessFactors Learning focuses on employee development and SAP Litmos solutions drive customer experiences. SAP recently doubled down on HCM when it acquired SwoopTalent, which will help provide more customized employee journeys with its talent data intelligence capabilities.

SAP Content Stream powered by Skillsoft has continued to expand. SAP also offers off-the-shelf content from Harvard Publishing and LinkedIn Learning. SAP also offers SAP Enable Now, its services offering for custom content development. 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.

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.

Strengths

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

Challenges

- Focus on learning versus talent and HCM platforms

Innovators

Axonify

Axonify, based in Waterloo, Ontario Canada, helped to pioneer the shift to microlearning. In April 2021, it announced an undisclosed investment from private equity provider Luminate Capital. Four members of Luminate Capital will join the Axonify Board of Directors. Axonify focuses on learning for frontline workers in retail and grocery markets. It also offers learning for contact centers, finance and insurance, and telecom. Axonify offers its modern learning and communications platform that combines AI-based adaptive learning capabilities that also includes a library of off-the-shelf content sourced from a content marketplace.

Axonify offers three different modules, Train, Reinforce, and Communicate. Based on their market focus, many retailers will want to evaluate both Train and Reinforce. The growing Axonify content marketplace features BizLibrary, OpenSesame, Bob Phibbs the Retail Doctor, and Vado.

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 microlearning and continuous learning reinforcement makes it solid choice to drive frontline employee engagement.

Strengths

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

Challenges

- Market awareness outside of North America

BenchPrep

BenchPrep, based in Chicago, focused on mastery-based training for enterprises and associations to ensure high performance. BenchPrep's LMS focuses on delivering personalized experiences, upskilling learners, and helping enterprises offer regularly-spaced education cycles using a microlearning approach. 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. BenchPrep's LMS is purpose-built for test and certification preparation, using confidence-based learning and adaptive learning pathways to help learners feel confident going into their exam or certification test. Additionally, in January 2021, BenchPrep announced an integration with BigCommerce to enable a more seamless way for enterprises to offer extended learning capabilities with direct purchases of courses.

In March 2021, BenchPrep announced a new data suite built on Snowflake to provide powerful insights and advanced analytics to help organizations understand patterns in their data to improve their learner experience. 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 as well as software organizations who are looking to improve product adoption and expand their certification programs, whether in a B2C or B2B model. BenchPrep helps enterprises 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
- Omni-channel delivery
- White label
- Upskilling
- Reporting
- Advanced analytics
- Test and certification preparation

Challenges

- Market awareness

Cegid

Cegid, based in Paris, made a major move in July 2021 with the purchase of Talentsoft, which is based in Paris and has a growing client base in HR and Learning across France, the UK, Germany, and Northern Europe. This deal follows the 2019 acquisition of Meta4, the leading HCM provider in Spain, significantly expanding Cegid's HR footprint in Southern Europe and Latin America. The acquisition of Talentsoft is expanding Cegid's ability to serve customers in the UK, Germany and Northern Europe, which complements its prior expansion in Southern Europe with Meta4.

The Cegid talent portfolio includes learning, recruiting, performance, succession planning, compensation, and analytics. 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. In addition to its existing Cegid offers off-the-shelf content via partnerships with OpenSesame, Talentsoft offers additional off-the-shelf content as well as Custom content development services. With its embedded learning content management system (LCMS), enterprises can manage their course updates on a local and global bases.

Strengths

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

Challenges

- Balancing focus on retail vs. talent management

Docebo

Docebo, which did an IPO in December 2020, announced a series of new executives, including the promotion of Alessio Artuffo as President and Rudy Valdez as Chief Operating Officer. Docebo launched a new updated Learning Suite in March 2021 that includes the Docebo Learn LMS, Docebo Content—an off-the-shelf content library, Docebo Shape, a content creation tool that leverages AI and Docebo Impact, which measures the effectiveness of the Learning deployment.

Docebo Content is really an update of its previous content marketplace, which supports LinkedIn Learning, GO1, and many others. Docebo continues to leverage AI to make intelligent course and content recommendations for learners and platform administrators. Docebo now offers an updated set of Learning analytics that it launched in July 2021, and it can help to track learning outcomes and their impact on business outcomes. Docebo does count a growing number of OEM partnerships to help its continued growth.

Strengths

- LMS capabilities
- Content Marketplace
- Mobile app
- Content Creation
- Coaching

Challenges

- Balancing OEM vs. direct sales

Gyrus Systems

Gyrus Systems based in Virginia, has continued to offer the GyrusAM LMS, its flagship learning platform. GyrusAim Cloud is available on the Microsoft Azure Marketplace. GyrusAim offers a modern interface that includes gamification, social learning, and a responsive mobile HTML5 interface. GyrusAim capabilities include core ILT, learning path, e-learning, assessments, certifications, onboarding, gamification, social learning, webinar (Zoom, Slack, Microsoft Teams, etc.), performance/feedback and more. Gyrus also has an API platform to enable integration with third-party applications.

Besides employee training, 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.

For Content, Gyrus partners with GO1, OpenSesame and Banker's Academy for off-the-shelf courseware. It also partners with dominKnow for courseware authoring. With support for over 16+ 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

NovoEd

NovoEd, based in San Francisco and led CEO Scott Kinney, focuses on high-impact collaborative and social learning experiences for global enterprises, executive education providers, and training organizations. NovoEd's Platform allows for flexible practice, a team workspace, learner profiles, discussions, and a project gallery for team members to provide feedback on each other's work. In September 2021, NovoEd announced that NovoEd Video Practice that allows for the development of interactive video learning scenarios.

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 now integrates with Degreed so more enterprises can offer more skills-based courses. NovoEd offers an authoring environment that allows for the fast creation of learning content. NovoEd now offers native Mobile apps for iOS and Android. AI-based usage tracking allows users to see others' activity and what is trending in their learning community.

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 based in Boston, has seen growth due to its focus on a just-in-time microlearning platform that has excelled in the healthcare and life sciences markets. Today it is being adopted by enterprises in broader verticals and for horizontal use cases beyond sales training. Qstream helped to pioneer microlearning and its focus on just-in-time knowledge delivery. Through this proven approach, learners are able to recall information in job scenarios sooner than traditional methods. The capabilities that can be delivered via Qstream include scenario-based Q&A challenges, spaced repetition, real-time feedback, peer interaction, and game mechanics.

Qstream offers robust analytics and has been able to show higher levels of engagement via its game mechanics, which makes microlearning fun, partially because it occurs in short bursts and can be delivered within the flow of work. Qstream has solidified its ability to extend beyond traditional LMS deployments. This is due to its ability to provide first presentation of learning content, reinforce knowledge, create meaningful behavioral change, and provide managers with real-time data on an individual's learning needs for remediation and coaching. Qstream assists enterprises with strategic positioning, professional services that include content development best practices, instructional design services, and program launch services.

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

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.