The Aragon Research Globe™ for Corporate Learning, 2017: The Race to Modern Learning

**Summary:** The fifth annual Aragon Research Globe™ for Corporate Learning examines 21 major learning providers. Enterprises are seeking providers that provide a modern experience and that can deliver knowledge and just in time learning, in addition to compliance-related training.

**TABLE OF CONTENTS**

- Introduction ................................................................................................................................. 2
- The Race to the Modern Learning Experience ........................................................................... 2
- Content Ecosystems ...................................................................................................................... 2
- Micro and Just in Time Learning ................................................................................................ 3
- Predictive Analytics and Business Results .................................................................................. 4
- Mobility and Offline Access ......................................................................................................... 4
- Social Learning - It Takes a Community and AI. .......................................................................... 4
- Enterprises - Leverage Platforms to Drive Innovation ................................................................. 5
- Aragon Research Globe Overview .............................................................................................. 6
- Dimensions of Analysis ............................................................................................................... 6
- The Four Sectors of the Globe ...................................................................................................... 7
- Inclusion Criteria .......................................................................................................................... 8
- Exclusions ...................................................................................................................................... 8
- The Aragon Research Globe™ for Corporate Learning, 2017 ..................................................... 9
- Leaders .......................................................................................................................................... 10
- Contenders .................................................................................................................................... 18
- Innovators ...................................................................................................................................... 21
- Specialists ...................................................................................................................................... 24
- Aragon Advisory .......................................................................................................................... 26
- Bottom Line ................................................................................................................................... 26
Introduction

Empowering associates with easy access to knowledge, knowledge sharing, and training for continuous improvement can directly impact the quality of the customer experience, the efficiency of operations, and even the amount of deals closed, among other key areas of the business. When it comes to Learning, continuous is the key word to focus on for 2017. The challenge facing Business Leaders in 2017 is how to make learning a continuous part of work versus doing it sporadically. Learning is not a one-and-done operation. Trends, issues, and challenges that affect the business today can and will change tomorrow, and associates need access to the tools that will prepare them to troubleshoot these issues and to improve their performance. Part of the solution will be looking at providers who offer a modern user experience and who can deliver just in time learning. The Aragon Research Globe™ for Corporate Learning, 2017 evaluates technology and service providers that allow an enterprise to manage and deliver all forms of learning.

The Race to the Modern Learning Experience

Senior executives know that knowledge can power an enterprise and that continuous Learning is critical to short and long-term success. At the same time, users desire a modern approach to learning and they want to make Learning an integral part of their job. To meet these needs, a complete approach to Learning is a requirement; simply having a Learning infrastructure in place is no longer sufficient.

The shift to a modern Learning experience is also helping to drive the growth of new providers, such as Axonify, D2L, and NovoEd, which is putting the pressure on incumbent providers to offer more (with User Experience being the key focus area). This trend is pushing all Learning providers to shift away from a total focus on Admin Features to one of capabilities for the learner.

Content Ecosystems

In 2017, Learning has pivoted to focus more deeply on content and on the courses that provide content, including courses that are in the form of shorter segments. This demand has forced Learning Providers to partner on, acquire new, or refresh existing, learning content. In 2016, Aragon predicted that automatic content integration would become a must-have feature in the modern Learning Platform. Given the growth of content, interest in Learning Content Management systems (LCMSs) have grown alongside Video Learning platforms. Both are integral components to the Modern Learning Platform (see Figure 1).
New standards such as xAPI and Learning Records are also making it easier to track content. Learning and Development professionals understand that xAPI can open up the tracking of content, and in 2017, most vendors are in the process of supporting xAPI.

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 their app store or marketplace. The store/marketplace allows for ease of locating the partner apps and in many cases, allows for purchase of the apps.

**Microlearning and Just in Time Learning**

Delivering knowledge in small chunks at the time of need is the essence of Microlearning. In 2017, more Learning providers are enabling Microlearning in key roles, such as Sales.

To test the comprehension of just in time learning, quizzes and learning snippets can help a Sales Representative or Call Center Rep instantly re-visit the information they need to have at their fingertips. The big idea for just in time Learning is that advanced applications can recognize upcoming activity and provide Learning nuggets that help the individual retain the knowledge that is applicable to a specific activity, such as a Sales Call.
Predictive Analytics and Business Results

Just as with other business applications, Business Leaders want more robust analytics that show the impact of learning on business performance. This is a key part of measuring the ROI of Learning investments. Furthermore, this is part of the reason why Microlearning and quizzes, which can deliver or reinforce knowledge at the time of need, are becoming an essential part of the modern learning experience. Newer offerings are focusing on outcomes as a primary feedback loop for business managers.

Aragon feels that we are at the beginning of 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. In this report, a number of providers now offer predictive capabilities. This is clearly the go-forward direction and enterprises should carefully evaluate providers for their roadmaps on this capability.

Video Learning Continues to Grow

People who want to learn things fast are using video tutorials that show them how to accomplish the task at hand, and this is why Video Learning has been on the rise in recent years. One of the reasons that Video Learning is popular is that it enables Video Microlearning, which is the delivery of Learning in small chunks of 3-5 minutes.

As video continues to become the preferred learning method, we expect more Learning providers to offer more video content management capabilities. Vendors such as Cornerstone OnDemand, D2L, IBM, and PeopleFluent are leading the charge with innovative Video Learning and video sharing capabilities.

Mobility and Offline Access

Mobile support for learning is a must-have capability and in 2017, some providers do it better than others. Nearly all Learning providers offer Mobile Learning apps, but some have gone backwards to a responsive web interface. One key thing we see in the Mobile Learning market is the desire to take courses offline. Leading learning providers support this important ability. Video Learning on Mobile Devices is one of the fastest ways to gain traction with business users.

One thing that holds back the increased use of Mobile Learning is legacy content. Enterprises need to refresh old learning courses and get rid of Flash-based content that will not play on mobile devices. Meridian is still one of the few providers that delivers a mobile first approach that allows customers to have a branded Mobile Learning application that can be delivered via the Google Play or iTunes App store. Regular updates on Mobile Apps are an absolute best practice and cannot be forgone.

Social Learning: It Takes a Community and AI

Social Learning is about people learning from each other and from recommendations powered by Machine Learning. The interactions in a Learning Community depend on the available interactions between people. Social Learning blends formal and informal learning into a modern, community-
based experience. Learning providers and Social Software providers are making it much easier to build knowledge networks that deliver knowledge and information to users when they need it.

As a result of this, Social Learning Networks are becoming Knowledge Networks. The more information that becomes available, the faster it can be understood and recommended to users (via Recommendations that come from Machine Learning algorithms).

**Enterprises: Leverage Learning Platforms to Drive Innovation**

The shift to complete Learning Platforms is transformational and enterprises need to step back, observe what has happened in other markets (e.g. CRM), and look for providers that are making the investments to open up their software stack. Enterprises need to look at these two intersecting trends: the power of platforms and the need to train their people and customers in a more holistic fashion.

Learning Platforms will power innovation and allow enterprises to do more with their investments in a shorter amount of time. Enterprises looking to innovate in how they deliver Learning should look to extend their offering by integrating it with other applications.
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 Aragon Research 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:

- **Learning 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 Aragon Research Globe is segmented into four sectors, representing high and low on 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, 2017 will help clients differentiate the many vendors who 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. Technology Providers Docebo, Lumesse, and Mzinga did not respond to Aragon requests for incremental information and/or did not review the draft of this research note. 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:

- **Degreed**, based in San Francisco, is an emerging Learning Provider who focuses on Content Integration. Degreed focuses on the idea of life-long learning in enterprises.

- **EdCast**, based in Mountain View, focuses on Micro Learning and offers just-in-time capabilities such as GuideMe.

- **Workday** - Workday is one of the fastest-growing cloud providers of human capital management and financial management solutions. It announced a Video Learning focused offering in 2016.
The Aragon Research Globe™ for Corporate Learning, 2017
(As of May 19, 2017)

Figure 2: The Aragon Research Globe™ for Corporate Learning, 2017
Axonify

Axonify, led by veteran Tech Startup CEO Carol Leaman, offers a modern learning platform that focuses on knowledge and just in time learning. The Axonify Employee Knowledge Platform combines predictive capabilities with gamification, creating an engaging learning experience that focuses on Microlearning and job aids. On top of that, its focus on outcomes will be notable to business buyers. This full learning platform and intuitive approach to learning has led to a significant number of enterprises selecting Axonify.

In November 2016, Axonify raised $27M in growth equity to help fund its continued growth. Axonify’s focus on a number of roles, such as Sales and Customer Service, is one of the reasons that has led to its success. In 2017, it has expanded globally with partnerships for product distribution in areas such as South Africa. Axonify’s focus on Microlearning, combined with continuous reinforcement, will be an attractive feature set for buyers.

**Strengths**
- Microlearning
- Analytics
- Predictive Capabilities
- Gamification
- Focus on Sales and Contact Center

**Challenges**
- Market Awareness
Cornerstone OnDemand

Cornerstone OnDemand (CSOD) has continued to grow in both Learning and overall Talent Management. It offers one of the most complete Learning Platforms and has the largest install base. In 2016, it expanded its Global Cloud footprint with announced data centers to be added in France and Germany. The Cornerstone Learning Module is modern and it includes Video, Collaboration, and Mobile Support. Cornerstone has satisfied the growing demand for content by building out its Content Network via partnerships with Skillsoft and others.

Cornerstone Edge, its PaaS Platform for Talent Management and Learning, has a growing number of partner applications that are part of the Edge Marketplace. Cornerstone is innovating with its Cornerstone Insights offering, which offers predictive analytics dashboards across the Talent Management Suite, including Learning.

**Strengths**
- Talent and Learning Platform
- Video and Mobile Learning
- Predictive Analytics
- Marketplace for Apps and Content

**Challenges**
- Balancing focus on Mid Market and Large Enterprise
D2L

D2L delivers a rich learning experience platform to organizations around the world. The company’s product, Brightspace, is a full feature, modern learning solution that provides an engaging experience for the learner, as well as easy tools for learning administrators, instructional designers, and subject matter experts.

Key highlights of Brightspace include: social learning and assessment, content creation and curation, adaptive learning pathways, and integrated video across the platform. D2L’s unique approach to video and developing SMEs allows any user to create short videos and share with a community of their peers, enables group based video collaboration, and provides video based assessments including online quizzing and assignments. In addition, D2L integrates well with other content vendors and is adding new partnerships with leading providers to deliver best in class corporate training content. D2L has been expanding its corporate footprint with a strong understanding of learning, education pedigree, and success with Fortune 500 customers.

**Strengths**
- Learner Experience
- Content Creation and Curation
- Video Capabilities
- Analytics
- Content and Technology Integrations

**Challenges**
- Awareness outside of North America
**IBM Watson Talent and Kenexa**

IBM Watson Talent and Kenexa is a Learning and Talent Platform that is now focused on leveraging the predictive and cognitive capabilities of IBM Watson. From a learning perspective, IBM continues to focus on content via the IBM Kenexa Premier LCMS. In 2016, IBM continued to expand its open HR partner program, which currently has over 100 partners. IBM’s flagship LCMS is used by many large enterprises due to its scalability, support for multiple content types, and multiple modes of content delivery, including mobile.

IBM has combined forces between its software division and the IBM Global Business Services Talent and Engagement division so that it can go to market in a more unified manner. By leveraging IBM’s social collaboration, video learning, and dynamic delivery capabilities, IBM offers a personalized learning experience that when combined with analytics, can help to identify and deliver learning when it is needed. IBM’s advanced, predictive Watson analytics represents the future, in part because of how easily humans can query and get answers from the system using natural language processing.

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Talent and Learning Platform</td>
<td>• Known more for LCMS than LMS</td>
</tr>
<tr>
<td>• LCMS and Content Creation</td>
<td></td>
</tr>
<tr>
<td>• Video Learning</td>
<td></td>
</tr>
<tr>
<td>• Predictive Analytics</td>
<td></td>
</tr>
</tbody>
</table>
NetDimensions

NetDimensions was acquired in March 2017 by Learning Technologies Group plc. (LTG). LTG continues to focus NetDimensions on its growth in high consequence industries, such as manufacturing and healthcare. LTG recently appointed Saba veteran Bill Mastin as SVP Global Sales of NetDimensions. Bill has proven experience with major clients and this move should help to keep NetDimensions on its growth trajectory.

NetDimensions’ growing competence in high consequence industries is due in part to its ability to deal with compliance (21CFR11) and extended enterprise training. NetDimensions is the one-stop shop that enterprises are increasingly seeking. It is now part of a group of companies that represent a comprehensive set of products and services to support organizations learning needs, including a responsive content authoring tool, xAPI LRS, content creation, and strategy. With the combination of products, services, and capital provided by LTG, we expect NetDimensions to continue to focus on its vertical market strategy and the flexibility that its SDK and API architecture provides to enterprises of all sizes.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>LMS</td>
<td>Market awareness in the U.S.</td>
</tr>
<tr>
<td>Talent Management Suite</td>
<td></td>
</tr>
<tr>
<td>Analytics</td>
<td></td>
</tr>
<tr>
<td>Compliance</td>
<td></td>
</tr>
<tr>
<td>Language Support</td>
<td></td>
</tr>
</tbody>
</table>
PeopleFluent

PeopleFluent, based in Waltham, MA, has continued to expand and enhance its full talent suite. Its growth has been due to a combination of strong product offerings and an intense focus on strong vertical markets such as healthcare. PeopleFluent was a pioneer in and has continued to lead the market in Video-based learning. The PeopleFluent Mirror Suite combines both social and video learning that can be configured in a variety of ways, based on the training need.

Because of its formal and informal capabilities, the PeopleFluent Mirror Suite provides a next-generation Learning platform, which it is leveraging in vertical markets such as healthcare, manufacturing, retail, and financial services. The combination of on-demand learning, embedded Microlearning, formal instruction, social interactions, mentoring, and video content delivery make the PeopleFluent Learning solution a robust and modern engaging experience for users.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Video Learning</td>
<td>• Known more for Recruiting</td>
</tr>
<tr>
<td>• Social/Collaboration capabilities</td>
<td></td>
</tr>
<tr>
<td>• Vertical market expertise</td>
<td></td>
</tr>
<tr>
<td>• Strength of overall Talent Management Suite</td>
<td></td>
</tr>
</tbody>
</table>
Saba

Saba, which appointed Pervez Qureshi as CEO in 2016, has made a complete shift to the Cloud and it continues to migrate its remaining on-premise customers. On May 1, 2017, Saba completed its acquisition of talent management provider Halogen Software. While this creates some short-term product overlap, overall it provides Saba with more capabilities in overall Talent Management.

In 2016, Saba made enhancements to its core product by adding real-time engagement and pulse surveys, enhanced ecommerce, more mobile capabilities, and third party video integrations. Saba continues to win due to its scalability and completeness of its Learning platform, which includes virtual classroom, social communities, predictive learning, advanced assessment, and mobile capabilities. Saba’s Predictive Learning capabilities (e.g. its TIM (The Intelligent Mentor) solution) continue to help differentiate it from others.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Social, Video and Mobile Learning</td>
<td>• Continue to deliver innovation as a private company</td>
</tr>
<tr>
<td>• Virtual Classroom</td>
<td></td>
</tr>
<tr>
<td>• Predictive analytics and capabilities (TIM)</td>
<td></td>
</tr>
<tr>
<td>• Real-time engagement measurement linked to learning</td>
<td></td>
</tr>
<tr>
<td>• Rich APIs and drag-and-drop Marketplace</td>
<td></td>
</tr>
<tr>
<td>• Learning Record Store (LRS) and learning journeys</td>
<td></td>
</tr>
</tbody>
</table>
Skillsoft/SumTotal

Skillsoft, led by its Executive Chairman, Bill Donoghue, and newly appointed President and CEO, Larry Neal, has been focused on an extreme makeover of both its core talent platform and its learning content. Its subsidiary, SumTotal Systems, has upgraded most of its customers to the SumTotal Talent Expansion Suite, which offers a modern, engaging user experience with machine intelligence at its core, making it one of the easiest-to-use systems on the market. When combined with its off-the-shelf content from Skillsoft, it now offers one of the most complete talent ecosystems on the market as well.

SumTotal has significantly enhanced its enterprise search capabilities and has also added predictive recommendations in the form of recommended Learning and prescriptive development to close skill gaps. By combining its Learning Platform with its growing library of Business and Leadership Skills and Digital Skills, HR, IT and its new Compliance Content, Skillsoft and SumTotal makes it easier for enterprises to get both a platform and content all at once. Earlier this year, Skillsoft launched Percipio, its cloud based, state-of-the-art content delivery and immersive learning platform. With a renewed focus on the customer, its products, and its content, Skillsoft remains one of the providers to beat.

**Strengths**

- Large Install base
- Talent Management Suite
- User Experience
- Social Learning
- Robust Content Library

**Challenges**

- Supporting a large legacy base of products
Contenders

Blackboard

Blackboard built its Higher Education and K-12 install organically and via acquisition. With over a decade of experience in the corporate and government markets, Blackboard is starting to compete even more in this space and has some compelling customer use cases. In the cloud, Blackboard’s recent deployment on Amazon’s FedRAMP-certified AWS GovCloud will help it maintain and win more U.S. Federal Government learning business.

Blackboard Learn, the company’s flagship LMS, seamlessly integrates with its other solutions, including Blackboard Collaborate, which offers full Virtual Classroom capabilities. Blackboard Learn also integrates 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
Meridian Knowledge Solutions

Meridian Knowledge Solutions, based in Reston, Virginia, has continued to innovate with regular releases of its flagship LMS cloud platform. With its compliance and extended enterprise capabilities, Meridian continues to win new customers in multiple industries where training large numbers of people in a timely fashion is critical. Meridian's recent releases have expanded its certification capabilities, improved eCommerce experience, enhanced gamification, and introduced support for Microlearning. Its regular software updates continue to enhance the user experience and expand on its deep feature set, which demonstrate Meridian’s continued focus on Learning.

Meridian is still one of the few providers that delivers a mobile first approach. This allows customers to have a branded Mobile Learning application that can be delivered via the Google Play or iTunes App store. Meridian has had a heritage of selling to the to the Defense, Federal, and State Government buyers and this continues to be a core competency for the company.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Extended Enterprise</td>
<td>• Awareness outside of U.S.</td>
</tr>
<tr>
<td>• Mobile First Learning</td>
<td></td>
</tr>
<tr>
<td>• Branded Mobile Apps for Customers</td>
<td></td>
</tr>
<tr>
<td>• Scalability &amp; Security</td>
<td></td>
</tr>
<tr>
<td>• Easily configured branding options for the user experience</td>
<td></td>
</tr>
<tr>
<td>• Integration &amp; APIs</td>
<td></td>
</tr>
<tr>
<td>• Salesforce.com/CRM integration</td>
<td></td>
</tr>
<tr>
<td>• Custom extensions</td>
<td></td>
</tr>
</tbody>
</table>
Oracle

The Oracle Learn Cloud is part of the overall Oracle HCM Cloud Service. In 2017, Oracle updated the Learning Cloud with the addition of Learning Communities and the ability to create real-time reports for training and compliance status of teams and individuals. This builds on capabilities added last year, such as Video support and recommendations. The Video support includes allowing subject matter experts to publish their own video best practices.

Oracle has been in a protracted battle with competitors for its core HCM install base and as such, it has significantly refocused on its HCM Cloud offerings. For buyers using Oracle HCM and Talent Management Suite, Oracle Learning Cloud is a solid choice.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video Learning</td>
<td>Multiple Learning offerings</td>
</tr>
<tr>
<td>Overall strength of HCM Suite</td>
<td>Focus on Learning</td>
</tr>
<tr>
<td>Extended Enterprise</td>
<td></td>
</tr>
</tbody>
</table>

SAP SuccessFactors

SAP SuccessFactors, an SAP Company, offers one of the leading Talent Management platforms on the market. SAP continues to battle for full HCM and Talent Management Suite market ownership, and at the same time, SAP SuccessFactors continues to have a large Learning install base. It continues to push its Open Content Network (partnerships with external content providers OpenSesame, Udacity, Coursera, lynda.com, and others) and its integrated eCommerce, which enterprises can leverage across partners and customers.

SAP Jam, which integrates with the Learning solution, has had a number of significant updates that make Social Learning a breeze, including an enhanced Intranet capability, which can serve as a Digital Water cooler for sharing tacit knowledge, mentoring, and providing enhanced support for extended enterprise. SAP Jam and SAP SuccessFactors offer a number of third party apps via the SAP marketplace.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platform scalability</td>
<td>Focus on Learning versus Employee Central</td>
</tr>
<tr>
<td>Learning functionality</td>
<td></td>
</tr>
<tr>
<td>Courseware integration</td>
<td></td>
</tr>
<tr>
<td>Marketplace App integration</td>
<td></td>
</tr>
</tbody>
</table>
Innovators

Docebo

Docebo, based in Italy and Atlanta, is owned by Klass Capital. With a full feature set and a modular design, it continues to win new accounts in EMEA and North America. In 2017, Docebo shipped Docebo 7.0, which includes Docebo Coach and Share, its two Modern Learning modules that had been in beta in 2016.

Docebo continues to focus on core learning and Extended Enterprise. It offers an online content store option, which it calls a “MOOC Builder.” Docebo now offers clients the ability to customize their Mobile apps in both the Apple iTunes and Google Play App Stores. The open approach offered by Docebo is helping it to win new clients on a global basis.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>LMS capabilities</td>
<td>Lack of Native Mobile Apps</td>
</tr>
<tr>
<td>MOOC Builder</td>
<td>Collaboration capabilities</td>
</tr>
<tr>
<td>Coaching</td>
<td></td>
</tr>
</tbody>
</table>

Expertus

Expertus offers a full Learning Platform, including an innovative, mobile first app for Android and iOS. Expertus has also started targeting Sales with its ExpertusOne in the Salesforce AppExchange.

With features including gamification, Expertus is focused more on the end user experience and less on the administrator, something business buyers want. Expertus also enables meetings for live virtual training, which eliminates having to buy a separate virtual classroom product. In addition, Expertus has an integrated Learning Record Store (LRS) Tin Can, advanced e-Commerce compliance tracking, gamification, and a large library of REST API integrations.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>LMS capabilities</td>
<td>Market Awareness</td>
</tr>
<tr>
<td>Mobile Apps</td>
<td></td>
</tr>
<tr>
<td>User Experience</td>
<td></td>
</tr>
<tr>
<td>Salesforce Integration</td>
<td></td>
</tr>
</tbody>
</table>
Mindflash

Mindflash, led by long term CEO Donna Wells, is delivering on the promise of a Learning Platform that makes it easy to create or add content to it. Mindflash offers easy upload of courses, which include powerpoint, video, and SCORM files. Via integrations, such as its Salesforce Plugin, Mindflash is focusing on the needs of business buyers.

Mindflash has been growing and adding to its vertical market focus, which now goes beyond Technology to include Financial Services, Healthcare, Manufacturing, and Retail. With the demand for an integrated Modern Learning Platform with easy content integration, business leaders may look to Mindflash in part because of the ease of deploying and the value pricing it provides.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Salesforce Integration</td>
<td>• Awareness</td>
</tr>
<tr>
<td>• Content Integration</td>
<td></td>
</tr>
<tr>
<td>• Pricing</td>
<td></td>
</tr>
<tr>
<td>• Support for Extended Enterprise</td>
<td></td>
</tr>
</tbody>
</table>

Mzinga

Mzinga offers its proven Learning Platform OmniSocial, as well as Twil, its mobile first video learning offering that is easy to configure and use by business users. Mzinga has a consistent track record as a platform for enterprises that need to train large numbers of internal or external partners – including extended enterprise use cases for sales, support, and service.

Mzinga also offers support for xAPI and the resulting Learning Record Store (LRS). This means it will be easier for organizations to track learning outside of the LMS. OmniSocial Learning, when bundled with Mzinga’s Content Authoring tool Composica, offers a complete learning ecosystem that empowers learners with a modern user experience and support for mobile video. Given the growing interest in both Video and Custom Content, Mzinga offers more options for enterprise buyers.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Social and Collaborative Learning</td>
<td>• Market awareness outside of U.S.</td>
</tr>
<tr>
<td>• Content Creation</td>
<td></td>
</tr>
<tr>
<td>• Video Learning</td>
<td></td>
</tr>
<tr>
<td>• Extended enterprise expertise</td>
<td></td>
</tr>
</tbody>
</table>
NovoEd

NovoEd, based in San Francisco and led by CEO Ed Miller, is an emerging Learning Provider that offers an online learning platform that delivers more engaging and effective learning experiences. The demand for a better Learning Experience is being met by NovoEd, which makes it easy for Learners to collaborate and learn on the go from their Mobile Device.

NovoEd, which is used by a number of major Universities, is also gaining in popularity among large corporations, thanks to its ability to scale engaging in-person training programs online. Employees learn by collaborating on projects, sharing feedback, and applying new skills to the workplace. Learning continues through social and Microlearning at the point of need, across all devices. This blend of continuous formal and informal learning increases engagement and drives outcomes. The built-in AI that allows learners to see what is trending in their Learning Community takes Social Learning to the next level, and the robust analytics enable administrators to track engagement and improve efficacy.

Strengths
- Modern Learning Experience
- Mobile Support
- Dashboards & Analytics
- Social Learning

Challenges
- Market Awareness

Technomedia

Technomedia, a wholly owned division of the Cegid Group, continues to focus on Learning as one part of its Talent Management Suite. In 2016, it launched PeopleVision, which leverages big data, incorporates predictive capabilities with an enhanced user experience, and provides insights across the Talent Modules. Technomedia’s Learning and Development platform is comprehensive and has all of the capabilities an enterprise needs to manage a Global Learning Initiative. Technomedia also added Video Learning to its portfolio as part of its regular Cloud Release schedule. Video Learning enhances the overall approach to Social Learning from Technomedia.

Technomedia has demonstrated continued growth outside its traditional strongholds in Canada and France. With its relationship with Cegid and the investment of Silver Lake Partners and AltaOne Capital as controlling shareholders, we expect this to expand even more. Its regularly updated product line and solid install base are helping it to compete and win against larger talent management providers.

Strengths
- Learning Features and Portal
- Talent Management Suite
- Dashboards & Analytics
- Video Learning

Challenges
- Content Partnerships
Specialists

Gyrus Systems

Gyrus Systems, based in Henrico, Virginia and India, offers a complete LMS-focused Learning solution that is used by both small and medium enterprises. GyrusAim features an intuitive user interface with simple workflows for an administrator, instructor, students and managers. In 2017, Gyrus updated GyrusAim to include advanced gamification integration with openbadges.org and a brand new, responsive HTML5 interface.

Gyrus offers actionable dashboards and also supports multiple Ecommerce integrations, making it an option for extended enterprise. With support for over 35 languages, Gyrus is poised to compete in the Global Learning market.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• LMS capabilities</td>
<td>• Market Awareness</td>
</tr>
<tr>
<td>• Dashboards</td>
<td></td>
</tr>
<tr>
<td>• Skills-based Learning approach</td>
<td></td>
</tr>
<tr>
<td>• Language Support</td>
<td></td>
</tr>
</tbody>
</table>

Lumesse

Lumesse continues to focus on both the Lumesse and TalentObjects brands. In 2016, Diane Palmquest joined the US Team as the GM for the US-based Lumesse and CEO of TalentObjects. TalentObjects is the brand that is associated with its offering for the Salesforce App Cloud.

In 2016, Lumesse released Learning Gateway 8, its personalized Learning Platform that is focused on self-paced learning for users. Lumesse provides both off-the-shelf content brokerage and bespoke content development services, ideal for firms that prefer content and learning services together. Lumesse also released its CourseBuilder 8, which with its responsive HTML5 support, enables Course Creation that can run on all devices.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Overall Talent Suite</td>
<td>• Market awareness outside the U.S.</td>
</tr>
<tr>
<td>• Ease of Content creation</td>
<td></td>
</tr>
<tr>
<td>• Support for Mobile Devices</td>
<td></td>
</tr>
<tr>
<td>• Content Services</td>
<td></td>
</tr>
</tbody>
</table>
SilkRoad

SilkRoad, led by veteran CEO John Shackelton, is moving beyond traditional talent management transactions focused on automating processes to talent activation to deliver personalized talent journeys for employees to drive better business outcomes. Through SilkRoad Activate, which includes SilkRoad Recruiting, Onboarding, Performance, and Learning, SilkRoad offers mid-market and enterprise organizations the ability to tailor and deliver content for its employees on demand. Learning creates personalized learning portals with an intuitive, mobile-ready user interface; customizable learning libraries; automated learning processes via built-in workflow capabilities; comprehensive reporting; e-commerce capabilities; and access to third party, off-the-shelf courses.

When learning assessments happen in the field post training, SilkRoad’s mobile job assessment checklist makes it easy to verify or validate how well an employee follows a predefined process or procedure. The social functions of Learning can also be customized, making it ideal for customer learning deployments. With Microsoft Cloud and Office 365 integrations, Learning, which integrates with Onboarding and Performance, delivers a comprehensive and customizable experience for employee activation.

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-market and Enterprise Focus</td>
<td>Market awareness outside the US</td>
</tr>
<tr>
<td>Microsoft Cloud Support</td>
<td></td>
</tr>
<tr>
<td>E-commerce support for extended enterprise</td>
<td></td>
</tr>
<tr>
<td>Fully customizable for personal talent journeys</td>
<td></td>
</tr>
<tr>
<td>E-commerce support for extended enterprise</td>
<td></td>
</tr>
<tr>
<td>Connected learning experiences across the employee lifecycle</td>
<td></td>
</tr>
<tr>
<td>Mobile User Interface</td>
<td></td>
</tr>
<tr>
<td>Mobile job assessment checklists</td>
<td></td>
</tr>
<tr>
<td>Compliance tracking</td>
<td></td>
</tr>
</tbody>
</table>
Aragon Advisory

- Enterprise Learning planners should balance the need for an engaging Learning experience against just looking at LMS features.

- The shift to Platforms is here and enterprises should ask for product roadmaps on when third party app integrations will be offered (if they don't already do so).

- Enterprises should consider pilot tests to get feedback on critical capabilities such as user experience.

- Enterprises should look at vendors that make content integration simpler and faster. Content offerings should be examined for ease of use.

Bottom Line

Enterprises are beginning to re-evaluate how they transfer knowledge to associates and partners. Modern Learning offerings are all about the experience and having content at the user's fingertips. Business Leaders and Learning and Development Professionals should look at their current Learning providers and ensure that they can meet current and future needs, including, and especially, just in time learning capabilities.