**Hot Vendors in Learning, 2016**

**Summary:** The resurgence in the Learning market is due in part to the explosion of video and other informal content. Our 2016 Hot Vendors in Learning are helping enterprises to win the battle to make employees and customers more knowledgeable.

**Introduction**

The Learning Market is being redefined by the converging forces of predictive analytics, a mobile first world, and the rise of video Learning.

More than any other area, the need to digitally transform and win the talent wars is a race that Business Leaders desire to win. Learning is re-emerging as a hot area to invest in, and the enterprises that recognize this as a strategic move are not standing still. In this research note, we discuss some of the key trends in Learning and identify six Hot Vendors for 2016.

**Video Learning**

Video Learning is most likely destined to have the most profound impact on the enterprise out of all Learning trends. On its own, Video Learning is revolutionizing the way Learning is conducted within the enterprise. When executed correctly, it has a keen influence on overall employee performance and customer satisfaction.

The basic video tutorial is one of the foundational parts of a Learning curriculum. It can also be tied to a specific set of job skills, as well as embedded into applications for performance support.

Video Learning is poised to shake-up the Learning industry in several ways. Vendors need to respond to the demand and Learning and Development (L&D) departments need to take on the challenge of helping to create processes for generating superb instructional videos. Business Users intrinsically understand this; they are not waiting to leverage this technology.
The general video trend is headed towards more personalized and interactive content. Learning technology providers are now making it easy to customize interactive videos to the enterprise’s needs, driving innovation in the Learning industry.

Mobile Learning

The rapid growth of mobile has helped to redefine the way many business needs are fulfilled, including Learning. There is a big push for knowledge, courses, and content to be available anywhere and everywhere. This fits in line with the growth of the BYOD phenomenon, as enterprises begin to move towards personalized, and more mobile, devices.

Enterprises have taken note of this, and now there is a focus on mobile applications for Learning as well as the delivery of Learning content on mobile devices. The growth in the app market for Enterprise Learning reveals that mobility is a capability that technology providers need to focus on, since it can significantly impact the ultimate success of their product.

The way people absorb information differs from individual to individual, and location can factor into these differences. Some people have greater comprehension when somewhere quiet; others require somewhere with more activity taking place. Mobile Learning allows users to learn where they learn best, increasing the degree of knowledge retained from the module. The rise of Mobile Learning, when combined with Video, is fueling the demand for newer, easier-to-use Learning offerings.

Collaborative (Social) Learning

There are some things that are better learned in a group. Complex material can be difficult to understand, but Social Learning creates conversation and allows different viewpoints to emerge, which can result in a deeper understanding of the material for all parties.

The next phase of collaborative Learning will blend formal and informal Learning together into a modern community-based experience. Five of the 2016 Hot Vendors - Degreed, D2L, EdCast, TWIL, and Zavango - are all focused on the collaborative aspects of Learning.

Content Ecosystems - Learning Technology

The shift to Connected Clouds and the resulting ecosystems are also impacting Learning. With the push for more content and more integrated applications, enterprises are also calling
on their Learning providers to provide application marketplaces. These marketplaces enable enterprises to add extra features that are not available in the core platform; this helps Learning and Development (L&D) organizations extend the life of their programs. It also gives enterprises another avenue of program customization, by allowing them to add and subtract additional features to the platform, resulting in a custom Learning system that fits their needs.

Aragon expects that marketplaces will be commonly included by YE 2016, and Learning is no exception to this. Leading providers are already including marketplace support for their applications, ideally with support for both the application and courseware. Open Platforms are known to drive innovation by allowing users to design and create add-ons, which could aid in the development of Enterprise Learning suites down the road.

**Predictive Learning and the Rise of Learning Assistants**

One of the major shifts in Learning is the shift to Predictive Applications. This coincides with the overall trend of predictive technologies being on the rise in a myriad of sectors, including, but not limited to, Learning. Predictive technologies, generally run from the cloud, are used to suggest courses and content for users of Learning software. Predictive Learning will remove many of the manual aspects of Learning, as the sophisticated algorithms in high-quality Predictive software will help people understand their knowledge gaps.

Aragon predicts that Learning Assistants will become a common part of the workplace by 2019. That means an enterprise needs to focus on content as much as on anything else. We see Chatbots and Personalized Recommendations as two of the short-term ways that Learning can be delivered. One of our Hot Vendors Tasytt is offering a Learning Chatbot for Slack, and another Hot Vendor, Degreed, offers personalized recommendations via a number of communication channels.
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This research note is not intended to be a complete list of vendors in the markets being discussed. Rather, it highlights vendors with interesting, cutting-edge products, services or technologies.

For 2016, one of the Hot Vendors in Learning includes:

- **Desire 2 Learn (D2L Inc.)**
D2L Inc.

Figure 1: D2L’s Brightspace platform drives engagement through rich content experiences and personalization.

D2L®, offers Brightspace®, an integrated Learning engagement platform that is designed to engage the modern learner with video, social, and mobile technology. D2L’s Brightspace has excelled with tech-savvy learners in K-12 and higher education markets, and has also recently developed capabilities for the corporate Learning market.

What makes D2L’s Brightspace hot is its ease-of-use in allowing Subject Matter Experts (SMEs) to develop engaging Learning experiences. Flexible course building tools allow easy integration of both SME-created content and third party content (i.e. Scorm, YouTube, etc.) using drag-and-drop technology.

Brightspace includes native web-casting and web-conferencing tools, the ability to create video-based content, and informal feedback via webcam. From a mobile perspective, the platform provides an open architecture which allows additional modules to plug in (game-based Learning, story builder, interactive assessments) or third party tools. Analytics enable organizations to look beyond completion metrics and into the actual engagement of learners with the content.

Who Should Evaluate D2L?

Enterprises that want to improve their learner and/or employee engagement should evaluate D2L’s Brightspace as it has the potential to improve employee efficiency and increase learner engagement, making it a useful tool.

Note 1: D2L at a Glance

D2L’s Brightspace is a Learning Engagement Platform that modernizes the Learning experience. Brightspace makes it easy for subject matter experts to design engaging courses with video, social, and mobile technology. It also adapts to the learner’s path and delivers tailored content based on success, preference, and development needs.

Location: Kitchener, ON, Canada
CEO: John Baker
Key Offerings: Brightspace
Availability: Available now
Website: www.d2l.com
Aragon Advisory

• Enterprises need to re-evaluate the way they manage Learning.

• Enterprises should evaluate these Hot Vendors and others to determine how well they can improve and speed up the delivery of knowledge to associates, partners, and customers.

• Enterprises should prioritize the investment into next-generation platforms that can speed up and enhance Learning.

Bottom Line

With the resurgence in Learning comes a new generation of products and services that focus on knowledge delivery and retention. Although tracking and analytics is still important, the explosion of content coupled with the need for enterprises to move fast, has created a demand for new solutions. These Hot Vendors in Learning are making a difference.