The Aragon Research Globe™ for Corporate Learning, 2024

Generative AI Means a Shift in How Learning Is Delivered

Author: Jim Lundy

Video Producer: Adam Pease

Topic: Learning, Employee Engagement

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

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Insights:

Prediction: By year end 2024, 40% of enterprises will have deployed their own versions of microvideo (60% probability).

Prediction: By year end 2025, 50% of enterprises will offer an intelligent learning assistant to help employees and customers with their training needs (80% probability).

SUMMARY

The twelfth annual Aragon Research Globe™ for Corporate Learning examines 19 major learning providers. With business transformation still a growing priority, learning is evolving from pure LMS/LXP to a modern platform that has Intelligent Learning Assistants. With AI-based Learning arriving on scene, enterprises will need to assess their current providers.

TABLE OF CONTENTS

Introduction

Corporate Learning is part of the modern workplace, now sometimes called Employee experience. Enterprises are leveraging corporate learning to help their associates perform at the highest level possible. Modern corporate learning is undergoing a tremendous shift, driven by the demand for better employee experiences and more just-in-time opportunities to learn new skills. Some of this is job-driven, and some of this is just the quest for learning. Business units are not standing still and are looking for new ways to enable associates to learn and perform better.

Many learning providers continue to do well—with either a multi-product software platform that has different elements of employee experience and/or a growing library of training and e-learning courses. These new offerings are really about the shift to a mastery-based approach to learning, which represents the maturation of learning. Intelligent Learning Assistants are also poised to help learners with their training and the ability to answer common questions quickly.

This twelfth edition of the Aragon Research Globe for Corporate Learning evaluates nineteen major providers in the market.

Intelligent Learning Assistants Emerge

Due to the rise of GPT and Large Language Models, Intelligent learning assistants are on the rise. Many initial efforts were considered very basic, but question-and-answer bots are becoming part of the digital workplace. For Employee Experience and Onboarding, Learning Assistants at a base level will be able to offer fast answers to common questions.

Large Language Models (LLM) are part of what is called Generative AI, which represents a new way for humans to talk to applications. Whether it be prompts or full natural language, the way people talk to applications is becoming less focused on queries and more focused on the spoken language. For Enterprise Learning, a few providers have added Generative AI capabilities, and more are expected to.

Intelligent Learning Assistants will be offered in a way that humans can start asking questions in free form to the application. The LLM is the front end, but it still needs the Conversational Intelligence algorithm (also called Voice AI) to be able to listen to either a voice call or, in some cases, a video call.

See Figure 1 below for the emerging architecture for Learning-based Coaching. Realize that Generative AI is still in its infancy, and many providers will add Gen AI and LLMs to their architecture over the next year. Given the shift to what is called multi-modal, the ability of Generative AI to understand documents, voice, video, and images means that Learning

assistants will be able to understand a broad range of Learning Content that can meet a specific learner's needs.
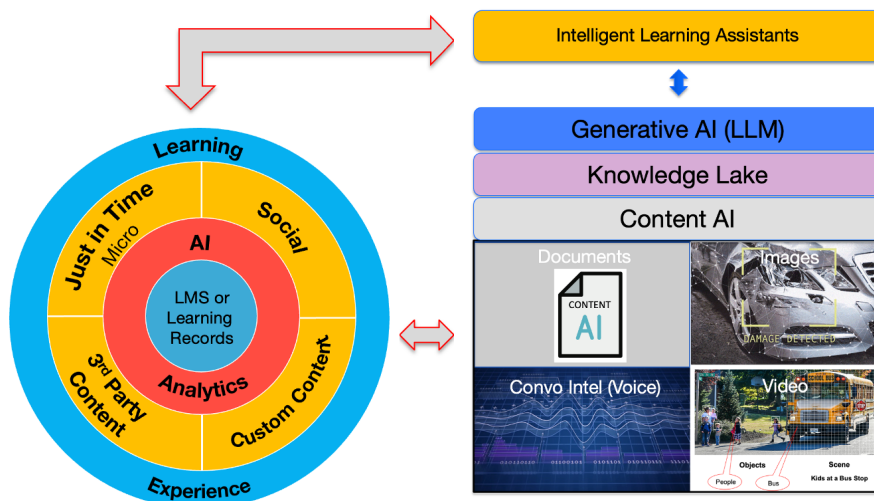
Figure 1: The emerging AI capabilities that help to make Intelligent Learning Assistants Smart for different job roles.

While nearly all of the focus today is on Conversational Intelligence, enterprises should realize that Generative AI-based applications can also be configured to read documents (document AI) and to look at video and images (computer vision).

Intelligent Learning Assistants will not be that difficult to build, given the wide availability of LLMs. While Technology providers in this report are expected to offer them, Aragon feels that many enterprises will embark on their own journey to build an Intelligent Learning Assistant. Failing that, enterprises should discuss their needs with an Aragon analyst.

Prediction*: By year end 2025, 65% of enterprises will offer an intelligent learning assistant to help employees and customers with their training needs (80% probability).*

Knowledge Lakes for People and Assistants

Part of helping people learn is training Intelligent Learning Assistants with knowledge. The rise of LLMs is kind of a low code interface into knowledge. Vector Databases will be the core technology where knowledge is actually stored as a validated piece of knowledge.

Hence, we call these knowledge lakes, not data lakes. Aragon feels that the construction of these knowledge repositories is part of the new race. Knowledge lakes will be key to helping employees and customers get their questions answered and also key to self-

paced learning.

The Learning Market Is About Content and Mastery

This is not to say that the LMS is dead – but only to suggest that buying an LMS is kind of like buying a car without an engine. Learning providers cannot just provide the platform—to be a complete provider, Learning content is needed.

Enterprise learning platforms are now multi-faceted. Aragon feels that a renewed focus on skills development and role-based training is what high-performance organizations continue to exhibit, but other organizations need to mimic these performance-focused best practices.

While last year we discussed the different ways learning offerings are bundled, we are suggesting that the enterprise reconsider how it trains for mastery of roles and, based on that, select providers that can meet their needs. Simply picking a platform because it is from your HCM provider is no longer sufficient. However, given that employees also want a better experience, they are attracted to enterprises that have a high level of focus on skill development, so it's a double advantage to make investments. It benefits the company through higher growth and benefits associates because they learn their skills and often learn to develop loyalty to the enterprise that didn't exist before, so there are really three approaches to acquiring learning platforms:

The different ways that learning is sold by providers:

1. Learning as Part of Employee Experience/Engagement
2. Modern Learning Platforms (LMS/LXP)
3. Modern Learning Bundled as Part of a Talent Management Suite

Modern Learning Platforms (LMS/LXP) with Learning Content

The most common approach to learning today is to acquire a modern learning platform, also referred to as either an LMS or an LXP. Learning experience platforms often have embedded content, but given that trend, even LMS providers are jumping into the content/courseware market with bundles.

The return of dedicated learning providers is good for the market—as learning has always been about an ecosystem (learning application and learning content). Many buyers were not happy with the bundle approach from large HCM providers and, as such, have often augmented their suite with a dedicated modern learning offering. Going forward, enterprises need to look at Modern Learning as including LMS and LXP functionality, which means an increasing focus on learning content and, over time, Learning Assistants.
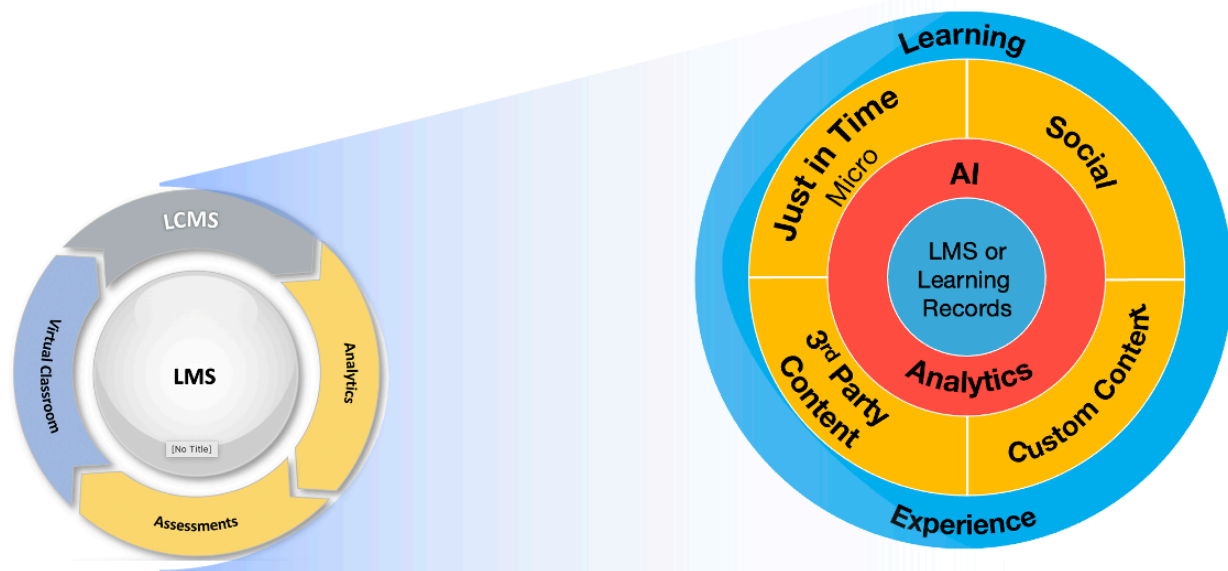
Figure 2: Modern Learning combines LMS with LXP capabilities.

Learning As Part of Employee Experience

Employees today expect to be offered training—and lots of it. Employee experience is a rising area of interest, with Learning being one of the core planks of these offerings.

The reason for this is that learning keeps associates engaged and is also the fastest way to enhance the operational knowledge of the workforce. This makes learning much more of a strategic focus than ever, 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.

Achieving operational excellence requires knowledge and know-how. 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.

Talent Management Suites Still Offer Learning

Today, there are still many talent management providers that offer learning as part of their talent management suite. However, just as many providers are growing at a faster pace because they offer both a learning platform and learning content and training as a

total bundle. Going forward, we see more enterprises selecting best-of-breed learning providers because of their ability to deliver mastery-based learning.

Bundling modern learning and talent management has been a rising trend in the last 15 years. Today, HCM and talent management providers offer a learning module as part of the bundle. These providers are now morphing to meet the demand for employee experience, and providers such as Oracle offer both a talent management offering and a new employee experience offering.
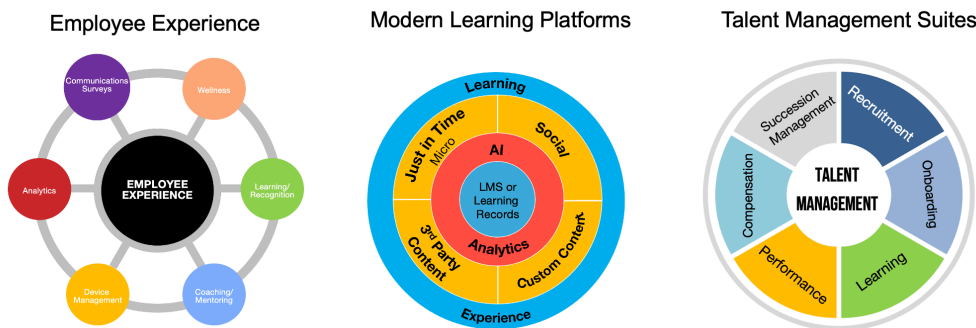
Figure 3: In 2024, Learning will be offered standalone and as part of Employee Experience or Talent Management.

Generative AI and the Rise of Intelligent Learning Assistants

Aragon has discussed the rise of learning assistants for several years. However, in 2023, this became a reality as more learning content could be delivered quickly to students with the aid of a learning assistant. While the initial capabilities may be to summarize information or to suggest courses over time, Aragon feels that learning assistants will actually be able to generate a custom set of courses at a basic level, leading to more advanced training down the road.

Advanced custom training will probably be the result of the ability of learning assistants to use computer vision AI to generate video-based learning that takes snippets from other sources to create the right level of instruction for a particular skill.

Put Microlearning to Work for Frontline Workers

The need for enterprises need to have highly-trained associates continues to be a top issue. Microlearning, which has also been called just-in-time learning, helps people to get tasks done with daily doses of knowledge.

Microlearning, which started in sales, is now being used in many departments, particularly for frontline workers. Microvideo has become much easier to share.

With AI and automation, learning applications can recognize upcoming activities 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 and is offered by several providers, including Axonify and Qstream. 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.

Video Learning and Microvideo as 2024 Initiatives

Video Learning is easier to do now than ever before. Even for Live Instruction, recordings can now be automatically sectioned into chapters for quick access. Learning Assistants can also locate these knowledge assets quickly to help reinforce the lesson that is being taught.

One of the reasons for the massive surge in demand for video learning is the consumer appetite for TikTok videos and Instagram Reels. Microvideo is essentially the 'TikTok for the enterprise" and is 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.

With AI-based computer vision, a platform can determine what a user is watching based on the images in the video or the meta-tagging tied to a micro video so that similar videos can be shared with that user. With this level of intelligence, the automation of skills-based video delivery training is possible.

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 repeatedly 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.

Prediction: By year end 2026, 50% of enterprises will have deployed their own versions of microvideo (60% probability).

Mastery-Based Learning Is Shared by Business Units and L&D

Learning has evolved, and today, it is about being able to accomplish all of the tasks and decisions in performing a role. 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.

Mastery-based learning also is more than just basic skills checklists. It means having advanced learning paths to get to the mastery of a role. It also means that business units need to partner with learning and development to come up with a plan to develop a

mastery-based curriculum. If we look at the different parts of a learning path, each group should take on some of the fundamentals. Note, it may be that the business unit owns the role and the content and leverages L&D to deliver some of the content, along with partners.

Business Unit	Learning and Development Organization
Entry Level Product Training	Employee Onboarding Courses
Mid-Level Product Training	Basic Skills courses
Advanced Product Training	Business Unit - Customer-Facing Training
Customer-Facing Training	Business Unit Customer Support

Table 1: Breaking down the roles and responsibilities for learning content development.

Mastery-Based Learning and the Extended Enterprise

Building up world class Mastery learning is no easy task. However, for any firm with customers, customer experience is often about learning and a mastery of how to use the product being sold. Many times, the Mastery-based learning offered to associates can also be offered to customers and that the payoff is often more satisfied customers who buy more.

Skills—Learning Content vs. Learning Training

Most of the Content providers in this report offer off-the-shelf courses. This means that there is a course the user takes and often reviews exercises or a test at the end. This is one of the ways that people can learn skills, but it takes skills, knowledge, and Process to perform a role.

Courses that are part of a role-based approach to training are something to look for. Also, providers that offer the option of live instructors (onsite or virtual) should also be looked at carefully. What we would say is that the more critical the job is at your firm, the more important and vital training is to successful performance.

Roles—Being able to Perform a Job

So, when evaluating Learning Content and Training providers, it is important to look at both core skills learning and role-based training. Both go hand in hand. An analogy: in sports, a player on a team needs to have skills to play the sport. On top of that, they need to know how to play their role—either as an individual or as a member of a team.

This rings true for enterprises as well. If anything, investments in training have not kept up with the shift to becoming a digital business. Technology is playing a bigger role in nearly every job, and with Generative AI, real work assistants will be in the workplace.

Training employees on how this new technology can be put to work is just one aspect of some of the coverage in this report. For the enterprise overall, learning how to buy (or build) predictive applications to increase the speed of the business—is an area that many enterprises are only now becoming aware of (Note: Aragon advises enterprises on AI).

Both are integral components of the modern learning platform (see Figure 4 below).
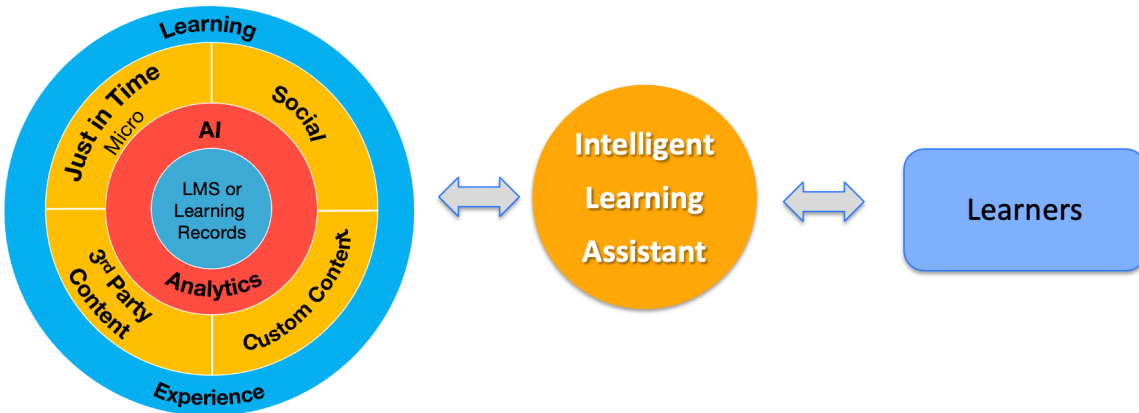

Figure 4: The learning market is shifting to a focus on learning experience and will be infused with learning assistants.

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).

Building a Learning Curriculum—The Ecosystem Manager

The providers in this report are part of the learning ecosystem you need to build. However, for each department in your enterprise, there needs to be a manager—someone we refer to as an Ecosystem Manager—who oversees the building of training programs.

Providers in this report are part of the equation of building out a full role-based training program. Some providers allow you to mix and match content from different providers to accomplish this, but often you need more.

LXPs were supposed to do this, but often functionality is limited. The truth is – the enterprise does need a Learning Platform to build out the role-based training. It should be noted that a few providers do enable this to varying degrees. See providers such as Cornerstone, Degreed, Schoox, and Skillsoft as examples.

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 of 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.

The Aragon Research Globe™ for Corporate Learning, 2024

(As of February 7, 2024)

Figure 5: The Aragon Research Globe™ for Corporate Learning, 2024.

Leaders

Cornerstone OnDemand

Cornerstone OnDemand (CSOD), based in Santa Monica and led by Himanshu Palsule, announced Bernd Leger as its CMO in April 2023. CSOD continues to focus on Learning via the multiple brands it has. CSOD is private and majority owned by Private Equity firm Clearlake Capital. CSOD now has four install bases that it serves: Cornerstone, Saba, SumTotal, and EdCast. Cornerstone has one of the largest install bases of talent management and learning in the industry.

Under the four brands, CSOD offers both LMS, LXP, and a full talent management platform, including customer and partner training. One thing to point out is that each learning platform has strengths that may attract buyers based on their requirements. Its Talent Experience Platform, which became available in 2023, features Opportunity Marketplace, Content Studio, and Skills Innovation. Skills innovation builds on the CSOD Skills Graph.

Cornerstone has shown increased revenue due to its learning content practice. The Cornerstone content offering, Content Anytime, has seen solid demand from buyers. Its recently launched Content Studio is helping to power more customized learning experiences. Content Studio offers streamlined Search, it can organize content with a focus on the skills needed to be developed, and it provides operational and outcome-focused analytics. With the integration with Cornerstone's Skills Graph, organizations receive a boost to their upskilling initiatives.

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	Challenges
• Talent and learning platform	• Reconciling multiple overlapping product families
• Compliance enablement at scale	
• Video and mobile learning	
• Content offerings and delivery	
• Content creation	
• Predictive analytics	
• Marketplace for apps	

D2L

D2L, which is based in Kitchener, Ontario, and led by CEO John Baker, completed its IPO in November 2021, raising about $120 Million. D2L focuses on four core vertical markets: Associations, Higher Education, K-12, and Corporate. D2L Brightspace provides an engaging experience for the learner with a particular focus on video learning, mastery-based learning, and social feedback. D2L made a major shift into the Talent Management space in 2021 with the launch of D2L Wave, its professional development platform. D2L Wave is a free-to-use workforce education marketplace that helps organizations grow by offering world-class professional development that attracts and keeps talent. D2L Wave is a free-to-use workforce education marketplace that helps organizations grow by offering world-class professional development to help close skill gaps and attract and retain talent.

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 the tools they need anytime, anywhere, and on any device. 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.

In November 2022, D2L launched the Brightspace Creator+ package, which is designed to enable low code creation of course content. Creator+ offers templates to speed up course creation, a styling tool that integrates with video editing tools to enable more visual experiences, and a Practices tool to enable practice exercises and quizzes. Creator+ simplifies the complexity of creating learning content to make any content creator feel confident and empowered to build compelling and engaging courses for their learners. This package of ready-made content templates, easy-to-use interactive elements, screen captures, and practice exercises allow educators to craft instructionally sound content.

D2L has been expanding its corporate footprint with associations, Fortune 500 customers, and continuing education sectors. It has also seen solid growth in Europe. With its growing industry focus and its enhanced focus on content and content creation, D2L is well-prepared to meet the needs of higher ed and corporate customers alike.

Strengths	**Challenges**
• Learner experience	• Market awareness outside of North America
• Competency-based learning and skills development	
• Content creation and curation	
• Video capabilities	
• Analytics	
• Content and technology integrations	

Degreed

 Degreed based in Pleasanton and led by CEO David Blake, announced Sandeep Beotra as CFO in May 2023, Nicole Williams as Chief Operating Officer, Nate Kimmons as Chief Revenue Officer, and Sanjay Parmar as Chief Technology Officer in January 2024. Degreed is private and has a total funding of $411M after its 2021 D Round of $153M. Degreed offers its LXP, its Learning Academies, its growing Content Marketplace, and a new skills platform. In December 2022, Degreed completed the acquisition of Learn In, which includes prepaid learning stipend cards, a marketplace of mastery learning programs aligned to the most in-demand skills, a customizable program builder, a tuition benefits manager, and dedicated coaching.

Degreed has expanded its capabilities to allow for extended enterprise deployments. It now allows for training across complex organizations, meaning a number of organizations can be connected in one extended enterprise instance of Degreed. The Degreed skill analytics provides a solid set of insights into what people are learning and where the experts are. The Degreed mobile and MS Teams app makes it easy to take courses or other learning resources on the go.

Degreed aggregates content from multiple sources, including TED@Work, Circus Street, DataCamp, edX, LinkedIn Learning, KES (Brazil), OpenSesame, Pluralsight, Skillsoft, and Udemy for Business, among others. The Learn In offering, now called Degreed Academies, allows for custom academies to be built, while the Content Marketplace offers personal tuition assistance and access to hundreds more content providers, including complete degree programs. Degreed is experimenting with different GenAI options for creating & curating content and learning pathways. Degreed is taking a measured approach to incorporating GenAI based on 1) the nature of its customers (many highly regulated); 2) global locations (i.e., some countries having banned ChatGPT); and 3) the evolving rules and regulations (or lack of) around GenAI.

Degreed has a solid and growing set of basic LMS capabilities, and it is continuously adding additional capabilities via partnerships and integrations with LMS partners, including LearnUpon, Konviva, and Docebo, as well as Workday and SAP SF; Degreed also continues to expand globally both with direct reach and via its growing partnerships with leading HCM and talent management solutions, including SAP and Workday, as well as talent intelligence and talent marketplace solutions like [Eightfold](#) and [Phenom](#). Degreed continues to partner with Workday and SAP, which leverage Degreed for its skills, data & insights, content offerings, and Learning Academies.

<u>Strengths</u>	<u>Challenges</u>
• Learning experience	• Dependence on LMS partners
• Learning Academies	
• Content and content partnerships	
• Skill measurement and management	
• Mobile app	
• Market awareness	

Docebo

Docebo, based in Toronto and led by Founder and CEO Claudio Erba, has continued to grow at a double-digit rate since its December 2020 IPO. Docebo's Learning Platform includes the Docebo Learn LMS, Docebo Content—an off-the-shelf content library, and Docebo Shape, a content creation tool that leverages AI. It also offers Docebo Impact, which measures learning effectiveness and Learn Data, which measures the impact of learning against critical business objectives.

Docebo continues to offer Docebo Connect, which helps to streamline integrations with other applications, and Docebo Flow, which allows Learning to be surfaced in-the-flow of work with either employee or customer-facing applications. Docebo also continues to offer Docebo Insights as part of its Learning Platform.

In January 2022, Docebo acquired Skillslive, a Learning Consulting firm in Melbourne, to expand its APAC presence. Docebo continues to support a number of external libraries through robust integrations, allowing customers to use their existing subscriptions to content providers like LinkedIn Learning, Skilla and more directly within the Docebo Learn LMS.

Docebo invests heavily in innovation that improves both the admin experience and the learner experience. In April 2023, Docebo announced the acquisition of PeerBoard, which will enhance its social learning and digital community capabilities. In June 2023, Docebo announced that it had acquired Edugo.AI to expand its Generative AI technology and further enhance its content authoring capabilities. In August 2023, Docebo announced a partnership with Google Cloud on Generative AI innovation.

Docebo continues to leverage AI to make intelligent course and content recommendations for learners and platform administrators. It also continues to leverage OEM partnerships to help its continued growth. With its investments in AI and content, Docebo is positioned well for continued growth.

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<tr><th>Strengths</th><th>Challenges</th></tr>
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- LMS capabilities
- Generative AI capabilities
- Content Marketplace
- Mobile app
- Content Creation
- Coaching

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- Balancing OEM vs. direct sales

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Oracle

Oracle continues to invest in its portfolio of Human Capital Management and Employee Experience. In April 2022 Oracle introduced Oracle ME, its Employee Experience Suite. Oracle Learning Cloud (OLC), its modern learning platform, is still offered as part of the Oracle Cloud HCM, which saw significant updates over the last year. Oracle Learning Cloud offers unlimited personalized learning journeys from onboarding to skill development. Oracle now supports micro-learning via its content generation tools. On top of this, Oracle Learning Cloud is fully unified with Oracle's Dynamic Skills, an AI-driven global skills engine that optimizes skills discovery and related learning recommendations for users and eases administration with automated skills-tagging of learning content at scale.

With a combined Oracle ME and Oracle Learning Cloud—it shows the potential for more personalized employee journeys that include coaching (via Oracle ME) and personalized Learning. In particular, the Digital Assistant that is part of Oracle ME means that regular interactions and learning recommendations can help to keep employees engaged. This builds upon the existing Oracle course recommendations that can be tailored to each employee or customer.

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. Some of the Community capabilities may overlap with the features of Oracle ME, but Oracle ME may allow for broader community engagement.

Oracle continues to offer native LinkedIn Learning integration. Additionally, 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 Cloud—and is available to any sized organization, local and global, with or without external content or integrations. This makes Oracle one of the first providers to offer a learning assistant, which will help with onboarding and ongoing skills development.

Strengths	**Challenges**
• Personalized learning journeys	• Awareness outside of Oracle install base
• Video learning	
• Communities	
• Investment in AI	
• Overall strength of HCM and talent suite	
• Extended enterprise	

Schoox

Schoox, which is based in Austin and Thessaloniki, Greece, and led by Founder and CEO Lefteris Ntouanoglou, focuses on modern learning with an employee-centric focus on both skills and jobs. In July 2021, Vista Equity Partners made an undisclosed investment in Schoox. This investment has allowed Schoox to invest in its platform and in its growth trajectory.

The Schoox platform offers Learning, Goals and Performance, Social Collaboration, Career Development, and Content Curation. Schoox offers a unique approach to learning that allows training outcomes to be compared against overall enterprise key performance indicators (KPIs). This approach should prove to be popular with business leaders.

Schoox has a growing number of content/courseware providers that include AllerTrain, BizLibrary, HSI, Intellezy, KnowCyber, Lobster Ink, MasteryTCN, Restaurant Playbooks, StateFoodSafety, Traliant, and UL Solutions. Skills that they offer via partners include Business Skills, Personal Development, Restaurants, Safety, HR Compliance, and industry-specific courses. Schoox integrates with all modern HCM/Payroll solutions and has productized integrations with YouTube, Vimeo, Google Drive, OneDrive, Zoom, Teams, and WebEx that make it easy to manage learning & development business processes.

Schoox offers a unique approach to learning that allows training outcomes to be compared against overall enterprise key performance indicators (KPIs). This approach should prove to be popular with business leaders. As Schoox continues to focus on its growing set of use cases, including Extended Enterprise, Frontline Workers, and Franchise training, Schoox is one to watch in the corporate learning market.

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<tr><td align="center"><u>**Strengths**</u></td><td align="center"><u>**Challenges**</u></td></tr>
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- Modern learning experience
- Social, collaborative based learning
- Content authoring and curation
- Dashboards & analytics
- Coaching
- Collaborative learning
- Integration with content and video libraries
- Management of complex organizational hierarchies suited for extended enterprise / franchises

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- Market awareness in North America

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Skillsoft

Skillsoft, based in Denver, CO, and led by CEO Jeff Tarr, continues to focus on helping enterprises with their workforce transformation initiatives. The AI-driven Skillsoft learning platform enables customers to grow, measure, and track skills. It offers both LMS and LXP functionality, and one of the industry's most robust sets of multimodal learning content.

Skillsoft's platform makes skilling personalized and accessible, offering a blend of self-paced online courses, hands-on practice, virtual live online classes, and coaching to close skill gaps. It provides over 1,250 expertly curated skill-based and role-based learning paths across compliance, leadership, and technology in multiple languages.

Over the past few years, Skillsoft has brought together three additional organizations to align with its fast-growing customer market. These include Codecademy, for deeper IT and tech mastery; Global Knowledge to address the growing demand for Instructor Led Training (ITL); and Pluma (now Skillsoft Coaching) to provide one-to-one executive-quality leadership development.

In June 2023, Skillsoft announced its ChatGPT Learning Journey offering, which helps enterprises understand Generative AI and Large Language Models. In September 2023, Skillsoft announced its Conversational AI Simulator (Skillsoft CAISY™) to help business leaders practice human skills such as coaching an employee. Given the ability to create a multitude of scenarios, CAISY should be popular with enterprises.

Skillsoft helped to pioneer learning assistants with its Embedded Learning Synchronized Assistant (ELSA) which has a Google Chrome Browser Plug-in and helps learners with specific training needs. With Global Knowledge and Codecademy as part of the overall portfolio and the amount of learning content offered, Skillsoft is one of the largest providers of corporate learning, including off-the-shelf content for both skills and mastery-based content.

Strengths	**Challenges**
• Install base	• Rationalizing the integration of recent acquisitions
• Consumer-grade user experience	
• Learning assistant (ELSA and SIA)	
• AI personalization and curated learning journeys	
• Mobile iOS and Android apps	
• Video-based microlearning	
• Approximately 850 skill benchmarks to track proficiency and growth across a range of business, leadership, and technical topics	
• Skill analytics dashboards	
• FedRAMP certification	
• Blended learning with both instructor-led and coaching offerings	

Aragon Research

Workday

Workday, based in Pleasanton, CA, and led by CEO Carl Eschenbach, was an early mover in Cloud, and it has seen strong growth over the last ten years for its focus on human capital management (HCM) and financial services offerings. Workday also complements its HCM offerings with Learning and Talent Management offerings. Workday also offers Workday Engage and Workday Everywhere.

Workday Engage is an initiative focused on delivering personalized experience across devices; Workday Everywhere allows associates to view learning courses from Microsoft Teams or Slack; and Workday Empower will focus on personalization using machine learning. Workday also offers integrations with both Degreed and Skillsoft.

Workday Learning, which is offered as an add-on to its large customer base, offers learning campaigns, curated content that can be personalized, integrated compliance, and analytics that can provide real-time notifications. In September 2022, Workday introduced a low-code App Builder as part of Workday Extend to allow developers to build and deploy unique Workday-based apps.

In September 2023, Workday announced Generative AI capabilities that will allow job descriptions to be written, as well as contract analysis and corrections. Workday also announced an AI marketplace to allow enterprises to find new third-party AI and ML applications. It also announced Workday AI Gateway, which allows developers to develop AI apps using Workday AI.

Workday also offers Extended Enterprise so that an enterprise can provide learning to its customers. Extended Enterprise is a major revenue driver for learning providers, and as Workday continues to expand this offering, it will see more demand. Workday was one of the first HCM providers to shift to the cloud and as more enterprises want to leverage Workday as a single source of truth along with an AI-enhanced user experience, we expect that demand for its learning offering will continue to grow.

Strengths	**Challenges**
• HCM install base	• Balancing focus on learning vs. HCM and financial services
• AI personalization and digital badges	
• Overall focus on skills	
• Microsoft Teams and Slack integration	
• AI personalization and digital badges	
• Learning journey	
• Blended learning	

Contenders

CrossKnowledge

CrossKnowledge is a wholly-owned subsidiary of Wiley and Sons and is led by Group VP Guillaume Gérard. It is based in Suresnes, France, with teams across the globe. The CrossKnowledge product offerings include its LXP, a full set of APIs, Learning Analytics, and a full e-learning authoring platform. They also offer a mix of a blended learning experience, a library of learning content developed with a wide faculty of thought leaders, facilitation expertise and facilitated programs, and a range of specialized services, including learner marketing and learning design.

Blendedx, its blended learning experience, enables its customers to develop their own training courses and training programs through a variety of learning activities. It also comes with a dedicated facilitation workspace. CrossKnowledge's full solution also includes another format, Learning Channels, for more unstructured learning.

Additionally, CrossKnowledge supports Mobile Learning via the MyLearning Mobile App, which also offers customization options. The CrossKnowledge Learning Suite offers students the ability to acquire relevant skills highly efficiently through these structured training programs, alone, or in groups.

CrossKnowledge's off-the-shelf set of content offerings feature 20,000 courses in 17 different languages that focus on employee development, leadership development, sales excellence, and onboarding. Two areas where it has made a significant investment in courses include management and leadership. It has also launched a set of new offerings over the last year that feature industry experts discussing high-in-demand topics, such as middle leadership and leading in uncertainty. The Facilitated Learning experiences, launched in 2022, are cohort-based and facilitator-led, designed to deliver outcomes thanks to an expertly-designed blend of CrossKnowledge learning capabilities.

With its commitment to growing its portfolio of outcome-based learning experiences, CrossKnowledge is well-positioned to deliver the full set of learning content and experiences, particularly for management and leadership development. CrossKnowledge is focused on delivering highly contextualized and impactful experiences through its extensive design, marketing, integration, and operational services.

Strengths	Challenges
• Learning outsourcing	• Market awareness in North America
• Learning suite	
• Content authoring	
• Content library	
• Sales use case	
• Management and leadership development	

Meridian Knowledge Solutions

Meridian Knowledge Solutions, based in Arlington, Virginia and led by Founder and CEO Jonna Ward, continues to focus on its Learning Platform for its diverse customer base. 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.

In August 2023, Meridian announced the launch of its Meridian Max LXP that offers a new user interface that includes configurable widgets and delivers a personalized learning experience for users. Meridian also announced an enhanced integration with Open Sesame. The 2023 Summer release also features US DOD Impact Level 4 (IL4) compliance.

Meridian helps enterprises with its focus on core learning, compliance, and training inside and outside of the enterprise. Meridian now allows for branded sub-domains which can allow different parts of an enterprise to offer a personalized experience to different learning audiences. In January 2023, Meridian announced capabilities that include enhanced collaboration that allows learners to interact with each other inside of a course.

Meridian is known for its focus in federal government, state, and local, and extended enterprise. Meridian also offers test management capabilities that include drag-and-drop question management and advanced workflows, modernized catalog pages, including in-line content play, a SCORM course player, robust xAPI support, and new certification history and workflows.

Besides OpenSesame, Meridian integrates with BizLibrary, Vado, and Vivid for learning content. For content authoring, Meridian partners with dominKnow. With its heritage of selling to defense, federal, and state and local government buyers, Meridian now also focuses on Construction and Engineering, Energy, Financial Services, Life Sciences, and Manufacturing.

Strengths	**Challenges**
• Extended enterprise	• Market awareness outside of the US
• 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	

PeopleFluent

PeopleFluent continues as a wholly-owned subsidiary of the Learning Technologies Group (LTG) and offers a full modern learning platform that includes its Learning Management System (LMS) and Learning Analytics and Content Authoring. Additionally, PeopleFluent offers its Learning platform as part of its full talent management suite, which includes compensation, performance, recruitment talent mobility, succession, and org charting.

The PeopleFluent Content Authoring is powered by Gomo (owned by LTG), and it features an easy-to-use interface that is also mobile ready. With the ability to leverage custom themes, learning content that is developed can be updated globally and the learning can be delivered in 250 languages.

PeopleFluent has enhanced its learning experience that is delivered through integrations with other components from the LTG portfolio, including Watershed LRS (advanced analytics), Instilled (visual and collaborative learning), and Rustici Software (native course launcher). PeopleFluent continues to leverage its partnership with Visier to leverage its people analytics platform. One of the things that helps PeopleFluent to win deals is its Exam Engine, which helps enterprises create and administer exams without the need to license a third-party Test Platform.

PeopleFluent's platform is multi-lingual and supports over 31 Languages. On third-party content, it integrates with Aurion Learning, CognosOnline, Courseware, Go1, New Horizons, and OpenSesame. With its increased focus on Learning Content, PeopleFluent is a solid choice for enterprises looking to replace their existing provider.

<table>
<tr><td align="center"><u>**Strengths**</u></td><td align="center"><u>**Challenges**</u></td></tr>
<tr><td>

- Content authoring
- Growing content partnerships
- Social/collaboration capabilities
- Vertical market expertise
- Analytics
- Strength of overall talent management suite

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- Market awareness outside of North America

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SAP SuccessFactors

SAP SuccessFactors is the business unit at SAP that focuses on human experience management (HXM) and Learning. SAP SuccessFactors continues to offer core HCM functionality, such as talent intelligence, which includes its learning platform. SAP SuccessFactors has also offered its SAP SuccessFactors Work Zone, which is essentially a digital work hub that also includes learning.

In July 2023, SAP SuccessFactors launched the new Integrated Learning Experience, which is powered by the Talent Intelligence Hub and a growing set of AI-based recommendations. The new experience allows better navigation of content, the ability of learners to save content for later, and can easily bookmark content instead of having to manually assign it.

SAP SuccessFactors continues to offer Degreed LXP integration via the SAP App store. SAP also offers off-the-shelf content from Harvard Publishing and LinkedIn Learning. It 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 can now offer Learning where people need it and for SAP customers, SAP SuccessFactors may be an easy addition to the platform versus buying a standalone LMS.

Strengths	**Challenges**
• Platform scalability	• Market awareness outside of the SAP install base
• Overall talent and HCM focus	
• Degreed partnership	
• Learning functionality	
• Courseware integration	
• Marketplace app integration	

Innovators

BenchPrep

BenchPrep, led by Co-Founder CEO Ashish Rangnekar and Co-Founder and Chief Product Officer Ujjwal Gupta, focuses on mastery-based training and learning for enterprises and associations. BenchPrep's LMS is designed with test and certification preparation in mind, using confidence-based learning and adaptive learning pathways to help learners build confidence as they prepare for a certification. 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 partners with Snowflake for its enhanced reporting and data visualization tools.

BenchPrep offers extended learning offerings via its integration with BigCommerce to enable the direct purchases of courses. 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 and PMI have continued their joint PMI Study Hall, an offering to assist students in preparing for the Project Management Professional (PMP) certification. 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	**Challenges**
● LMS capabilities	● Market awareness
● Mastery-based learning approach	
● Omni-channel delivery	
● White label	
● Upskilling	
● Reporting	
● Advanced analytics	
● Test and certification preparation	

Cegid

Cegid, led by CEO Pascal Houillon, focuses on Retail Solutions, Finance and Tax and HR & Talent Management. Talentsoft is its lead offering in its Human Resources business unit. Cegid now offers Core HR, Talent Management, Talent Acquisition, and Learning.

The Cegid Learning and Development Platform is a full LMS and supports video learning as a core offering, which enhances the overall approach to social learning. It also offers a full onboarding module that can be bundled with Cegid Learning.

It is based in Paris and has a growing client base in HR and Learning across France, the UK, Germany, and Northern Europe. Cegid also has an expanded HR footprint in Southern Europe and Latin America from the Meta4 acquisition.

In addition to its existing products Cegid offers off-the-shelf content via partnerships with OpenSesame, and Talentsoft, which offers additional off-the-shelf content as well as custom content development services. Demand for Learning Content is high and with its embedded learning content management system (LCMS), Cegid can allow enterprises to manage their course updates on a local and global basis.

Given the focus on industries, particularly Retail, Cegid is well positioned to offer its full suite of product offerings including Learning, which is so critical to Retail, given the high turnover of associates.

<u>Strengths</u>	<u>Challenges</u>
• Learning features and portal	• Balancing focus on retail vs. talent management
• Talent management suite	
• Learning paths	
• Dashboards and analytics	
• Content focus	
• Video learning	

Inkling

Inkling, based in San Francisco and led by CEO Mike Parks, continues to offer its mobile-first, modern learning platform for distributed workforces. Inkling learning focuses on find, learn, and do, which is more forward-looking than the traditional teach-and-test approach. This makes it ideal for Operations across multiple industries. Inkling leads with an intuitive mobile-first experience for both iOS and Android devices.

Inkling Knowledge allows for the creation of highly interactive and visual content for on-the-job learning that includes real-time performance support. This mission-critical content supports operational processes and replaces legacy operation manuals, training guides, and job aids for operational procedures. Inkling also offers its InkForms product that enables clients to build operational checklists with embedded learning.

Inkling Learning Pathways is a product that enables a more guided learning experience with learning paths, gated steps, targeted assignments, and role-based dashboards. Inkling's Connect iPaaS platform can allow enterprises to easily surface Inkling content into their LMS or LXP. Inkling has developed a solid and growing customer base in industries where operational knowledge is key. These include Grocery, Healthcare, Hospitality, Life Sciences, Retail, Restaurants and more.

<table>
<tr><th>Strengths</th><th>Challenges</th></tr>
<tr><td>

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

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- Awareness outside of North America

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NovoEd

NovoEd, based in San Francisco and led by CEO Scott Kinney, offers a unified solution for building and delivering cohort-based, social, and collaborative learning experiences. NovoEd is used to transform and scale in-person training by changing the modality of delivery to a digital, collaborative format. NovoEd continues to be leveraged by large enterprise organizations to build corporate and capability academies.

NovoEd's Platform enables group and team workspaces, in-course coaching, and mentorship features for internal or external coaches and mentors, learner profiles, video practice, discussions, and a project gallery for team members to provide feedback on each other's work. NovoEd is built for large learner populations with features like automated learner comms and nudges, enrollment management, technical integrations with LMS and LXP systems, and course and cohort management. In March 2023, NovoEd announced a partnership with GP Strategies (now owned by Learning Technologies Group (LTG)), which allows GP Strategies to offer NovoEd to potential clients and to add their well-known professional services to the mix.

The NovoEd focus is on enabling large enterprises to deploy employee upskilling, leadership development, design thinking, digital transformation, and onboarding programs at scale. In November 2023 NovoEd announced Learning Experience Impact, a free course to help business leaders learn about change management.

NovoEd is not new to AI. They offer AI-based automated translation for multi-region, multi-language courses. AI-based usage tracking and advanced analytics allow users and administrators to see others' activity and what is trending in their learning community.

Strengths	**Challenges**
• Modern learning experience	• Market awareness outside of North America
• Social, team-based learning	
• Mobile app	
• Content authoring and curation	
• Dashboards & analytics	
• Collaborative learning	
• Integration with content and video libraries	

Qstream

Qstream led by CEO Dan Whelan, has continued to focus on its just-in-time microlearning platform, which it helped to pioneer. Given their focus, Qstream sees success in the financial services, healthcare, and life sciences markets. While it started with a focus on sales training and enablement, other vertical markets are adopting it due to its ability to deliver knowledge in small chunks.

Through this proven approach, learners are able to recall information in job scenarios sooner than traditional training methods. The capabilities that can be delivered via Qstream include scenario-based Q&A challenges, spaced repetition of information, real-time feedback & manager coaching, peer interaction, and game mechanics.

In 2022, Qstream introduced front-line manager analytics reports, a new self-serve content management experience, an enhanced user experience featuring new question types, and updated manager coaching capabilities. They also announced new integrations with Microsoft Teams, Salesforce, Slack, Cornerstone, SAP SuccessFactors, Cisco Webex, and others.

Qstream has solidified its ability to enhance traditional LMS deployments and other training initiatives. 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 analytics on an individual's learning needs for remediation and coaching. Qstream assists enterprises with strategic positioning and professional services that include content development best practices, instructional design services, program launch services, translation services, and integrations.

Strengths	**Challenges**
• Microlearning platform	• Market awareness outside of North America
• 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	
• Microlearning integration capabilities with other learning and work systems	

Specialists

Axonify

Axonify, led by Founder and CEO Carol Leaman, continues to focus on frontline worker experiences that include learning and communications. Axonify has continued to focus on employee experience with a key focus on operations and using learning to ensure that people have the operational knowledge to get work done. Axonify offers learning for contact centers, finance and insurance, and telecom.

In addition to learning, 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 continues to offer its Content Assistant offering, which helps trainers to create multiple choice questions. Content Assistant works in conjunction with the Axonify Content Marketplace, which offers pre-packaged Learning Content.

In October 2023, Axonify announced a partnership with Vyond, and a new Content Studio offering. With Content Studio there is an expanded library of video training courses. Additonally Axonify offers a content marketplace with courses from 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 mobile-first approach and a growing library of video content, positions Axonify well to serve enterprises with frontline workers.

Strengths	Challenges
• Microlearning	• Market awareness outside of North America
• Analytics	
• AI-powered adaptive learning	
• Video- and question-based training content	
• Gamification and training engagement	
• Mobile device support	
• Focus on retail associates	

Gyrus Systems

Gyrus Systems, based in Richmond, VA, and led by Founder and CEO Viren Kapadia, has continued to focus on modern learning. The GyrusAim LMS is its flagship learning platform, and it has several capabilities including e-Learning, Learning Path, Skills Management and Competencies, Assessments and Certifications, AI Maintenance and Social Learning. which includes a modern interface that includes gamification, social learning, and a responsive mobile HTML5 interface.

GyrusAim also offers integrations with Zoom, Slack, Microsoft Teams for virtual classroom delivery. Gyrus partners with Microsoft and Gyrus Cloud is available on the Microsoft Azure Marketplace. 2023 saw Gyrus focus more on industries and today they focus on Manufacturing, Life Science, Banking & Finance, Government (Defense), Nonprofits, High Tech, and Utilities.

Gyrus continues to offer learning content and training via partnerships with GO1, OpenSesame, and Banker's Academy for off-the-shelf courseware. It also partners with dominKnow for courseware authoring. 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.

<table>
<tr><td align="center"><u>Strengths</u></td><td align="center"><u>Challenges</u></td></tr>
<tr><td>

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

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- Market awareness outside of North America

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Aragon Advisory

- Enterprises need to focus on a robust approach to learning for critical job roles in every part of the enterprise. Business units need to partner with L&D to ensure that the right focus is put on learning mastery for critical jobs.

- Enterprises are still faced with the need to develop robust learning content strategy, enterprises also need to have operational plans to refresh courseware each year.

- Enterprises should look to leverage Microvideo to make it fast and easy to share best practices for skills and how-to guides.

- Enterprises should evaluate Learning providers for their roadmaps for Generative AI and Intelligent Learning Assistants.

Bottom Line

No market is immune to the reality that Generative AI is here to stay. Intelligent Learning Assistants are coming, and enterprises should make plans for changing providers if the incumbent provider is not investing in this innovation effort. The need for quality learning content falls upon both the business unit and the learning and development group. Given that quality learning is still hard to attain, enterprises should look to have a committee in each business unit that is focused on roles and skills—and the courseware needed to enable high performance.

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, 2023 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.

- **Blackboard** focuses on the Higher Education market, where it continues to own a large install base.

- **Infor** offers ERP software as well a Talent Management Suite that includes Learning as part of that platform.