



The Aragon Research Globe™ for Corporate Learning, 2023

Learning Grows in Demand and Becomes Part of Employee Experience

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SUMMARY

The eleventh annual Aragon Research Globe™ for Corporate Learning examines 19 major learning providers. With business transformation still a growing priority, learning is both a requirement and a need for employees and customers. The race to better employee and customer experiences is tied to increased knowledge and how-tos. This means that the demand for both skills and role-based competencies will grow.

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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 a learning assistant to help employees and customers with their training needs (80% probability).

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Introduction

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.

Learning has been stuck inside talent management suites for the last 12 years. But it is now becoming clear that great learning is not necessarily tied to an HR suite but tied to a focus on skills development and job competency. The rise of both employee experience platforms and just-in-time video learning, which we call microvideo, are both helping to change how learning is delivered in the enterprise. This eleventh edition of the Aragon Research Globe for Corporate Learning evaluates nineteen major providers in the market.

The Learning Market Is Poised for Change

As mentioned above, learning is about courses and content that are merged together into a curriculum. Enterprises license many platforms to deliver basic skills and knowledge and then develop their own curriculum licensing content as well. 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.

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:

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

Learning As Part of Employee Experience

Employee engagement platforms put people at the center of focus. It is no longer just about tracking talent; it's about putting people in the middle of the conversation and investing in people. One of the fastest ways to improve the organization's performance is to enhance the operational knowledge of the 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.

Modern Learning Platforms (LMS/LXP)

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.

Modern Learning Bundled as Part of a Talent Management Suite

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.

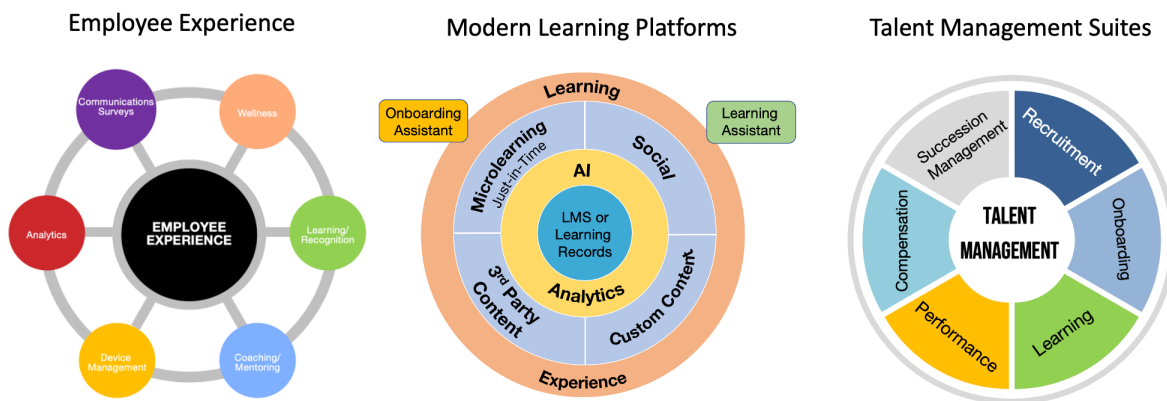


Figure 1: In 2023, Enterprises have multiple ways to acquire and deliver learning.

Learning Is Really About the Application of Knowledge.

While the term learning experience has exploded over the last several years, what it really meant was that learning providers needed to do more than just offer an LMS. It was about content, courses, and skills, which is why modern learning requires media and knowledge, not just keeping track of how and what people have learned.

Licensing content libraries is not enough for the digital enterprise. That's why the learning market is undergoing change, and that's why it is not a one-size-fits-all solution when it comes to choosing a learning platform. It is about curating content from multiple sources and continually adjusting the content recipes.

Learning Is Becoming Vital for Employee Experience and Customer Experience

The rise of so many independent learning-focused enterprises is proof that the old model of learning is only part of a talent management suite that wasn't working for employees. Business owners need to play a larger role in employee and customer-based training experiences.

AI will play a much larger role as well, since information that is shared by users can now be captured and reshared at the point of need. Below we introduce the term intelligent microvideo, and while the code word for this is 'TikTok for the enterprise,' user generated content will play a bigger role in both skills development and basic how to guides. It won't replace formal training when it comes to virtual classrooms and eLearning, but it will serve as a critical way to deliver just-in-time knowledge that leverages advanced AI-based recommendation engines that use computer vision.

The shift to learning experiences means that it's not always one size fits all when it comes to vendor selection. It's certainly not the case when it comes to content and courseware. Everyone is recommending that business units consider dedicated development resources for training and knowledge delivery.

While, in many cases, product launches focus on the training that is required, training is also needed for specific roles. It is often the case in both sales and service that dedicated sales trainers are part of the organization because so much regular knowledge transfer is needed, and experienced people are there to give guidance.

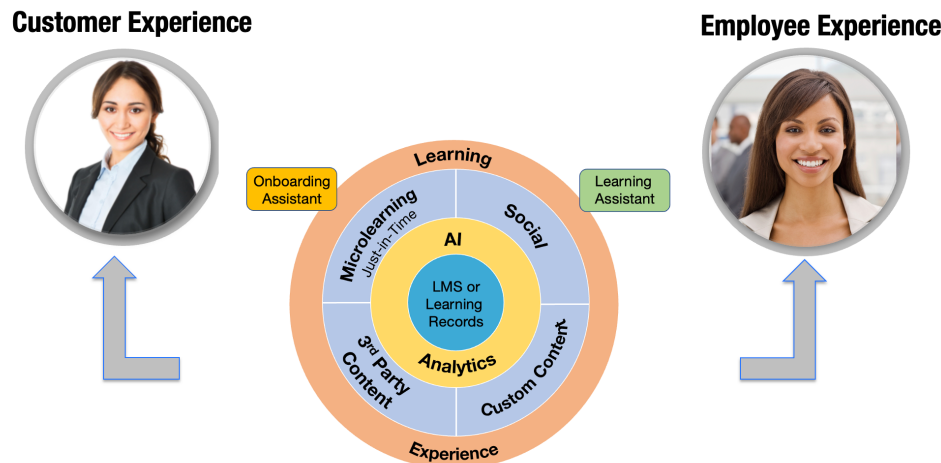


Figure 2: Learning is critical for both employees and customers.

The Rise of Intelligent Coaching

For many roles that are customer-facing there are now applications that enable both real-time and post-call coaching to help improve performance in future engagements. Coaching and mentoring are now part of employee experience platforms.

There is no doubt that even in the hybrid work environment we are in, coaching is needed to ensure job mastery as well as skills mastery. In the past, coaching has been done by managers or by mentors. Now, coaching can be done via software applications that provide recommendations based on past actions and interactions.

Conversation intelligence, sometimes referred to as voice analytics, is what allows a coaching application to provide insight and recommendations. This kind of intelligence can listen to a person, such as a salesperson or support person, and give feedback during or after the call. Post-call feedback is the prevailing trend.

Microlearning Is a Trend for Business Teams—Starting with Sales

High-performance enterprises need to have highly-trained associates, and one of the best ways to continuously reinforce learning is to use microlearning, which offers daily doses of the right content at the right time to reinforce productivity for tasks being done. Microlearning has really taken off in sales, as just-in-time knowledge can help advance sales deals.

The big idea for just-in-time learning is that advanced applications can recognize upcoming activity and provide learning nuggets for knowledge retention related to a specific task, such as a sales call. We'd note that microlearning is still emerging in the corporate learning market, offered by several providers, including Axonify and Qstream.

As mentioned below, one of the trends in video learning is the rise of microvideo, where user-generated content can be shown continuously to users based on topics they like or previous videos they have watched.

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

Video Learning Is a Trend for 2023

Given remote work, teaching employees and customers via online classes, known as virtual classrooms, is a phenomenon that is still growing. In fact, it is the go-to choice for live instruction. At the same time, demand for short-form video is growing. (see microvideo section below).

As enterprises shift to live virtual classes, they may want to recover the real estate associated with classrooms, since it is often a cost in many locations.

Because learning is now part of employee experience, we are seeing both collaboration and employee experience providers jumping on the trend of enabling employees to share best practices, such as how-to videos, in a secure and safe manner.

Why Intelligent Microvideo in 2023?

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

What Is Intelligent Microvideo? Personalization at Scale

With AI embedded that leverages 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 microvideo so that similar videos can be shared with that user. Consumer platforms such as Instagram Reels and Bytedance's TikTok offer these capabilities. 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 2024, 40% of enterprises will have deployed their own versions of microvideo (60% probability).

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

Mastery-based learning focuses on the skills needed to perform certain roles. It often involves levels of capabilities and a curriculum that starts with basic proficiency and goes all the way to expert classifications. Business divisions at enterprises are often responsible for ensuring that associates and partners have mastery—basically, that they are certified to do a certain job.

The need for advanced learning paths means that business units need to partner with learning and development. 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	Customer-Facing Training
Customer-Facing Training	

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

We would point out that many customer-facing business units already focus on the customer experience. Part of that journey mapping experience evaluates the need for better-prepared associates. This leads to a need for mastery-based learning because gaps in the employee experience are often identified by the realization that associates just don't have the knowledge to conduct that part of the engagement.

Understanding Courseware Quality and Leveraging Video Content

Quality courseware is the battle cry, and that means more attention needs to be paid to what a provider is offering and how good the content actually is. Due to this, the need to have multiple libraries and a way to source custom content is required.

The fastest way to produce tacit knowledge is through the use of video learning. As mentioned above, microvideo is the growing trend, and shortform video, along with in-depth courses that might include simulations, are the pathway toward full learning paths and journeys.

Given the growth of content, there has also been increased interest in providers that can manage course content from a variety of sources, including video. Both are integral components of the modern learning platform (see Figure 3 below).

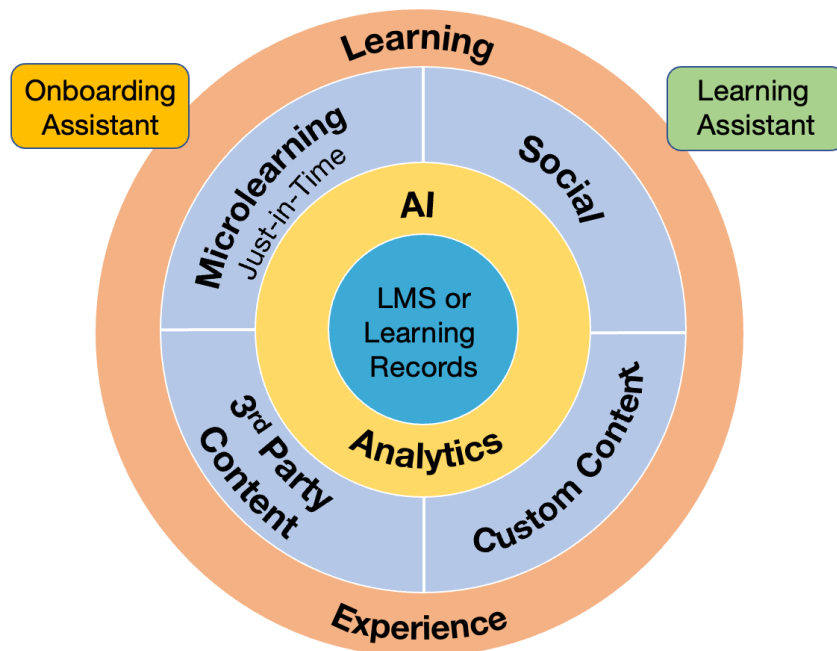


Figure 3: The learning market is shifting to a focus on learning experience and will be infused with learning assistants.

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).

Licensing and Building Modern Learning Content

The question that often comes up about learning content is whose responsibility it is to develop or procure training content. This singular issue has often led to incomplete training programs. Today, while L&D is racing to add more professional skills-based content, the business unit often owns the responsibility. In the aftermath of COVID, business units are in a race to digitize legacy classroom courses that also need modernization.

The availability of modern training content opens up the choices for enterprises. In many cases, video learning, microlearning, and in-depth training courses all need to be part of a learning path. Getting the right mix is important. Today, enterprises are just discovering the power of both microlearning and video learning.

One of the key evaluation criteria for learning providers needs to be the ease of adding content to their learning platform. This includes the ability to purchase content upfront or via the vendor's app store or marketplace. The store/marketplace allows for ease of locating the partner apps and, in many cases, drives the purchase of apps.

Learning Assistants Emerge as Coaches

The rise of tools such as ChatGPT prove that learning assistants are not that far off. Many initial efforts were considered very basic, but question-and-answer bots are becoming part of the digital workplace.

While Oracle, Skillsoft, and SAP are the few to offer chatbots/virtual learning assistants, Aragon is expecting a surge of conversational AI offerings over the next two years. Aragon feels that enterprises should ask their provider what their roadmap for conversational AI is. Failing that, enterprises should discuss their needs with

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.

an Aragon analyst. Enterprises should evaluate offering a skill-focused learning assistant for specific roles.

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

Creating a Culture of Continuous Learning

Continuous learning is about engagement with content and people, alongside AI-based recommendations that nudge users toward their learning and knowledge goals. Going beyond basic skill training should be the focus for every business unit, and that may mean digitizing old content and refreshing it at the same time. Employees want to be engaged, and they desire better training. By developing custom learning journeys that leverage the modalities discussed above, enterprises will have more engaged employees, and customers will be more engaged and often more loyal.

Learning platforms will power innovation and allow enterprises to do more with their investments in a shorter amount of time. Enterprises looking to innovate their knowledge delivery should look to extend their offering by integrating it with other applications.

The Aragon Research Globe™ for Corporate Learning, 2023

(As of February 2, 2023)

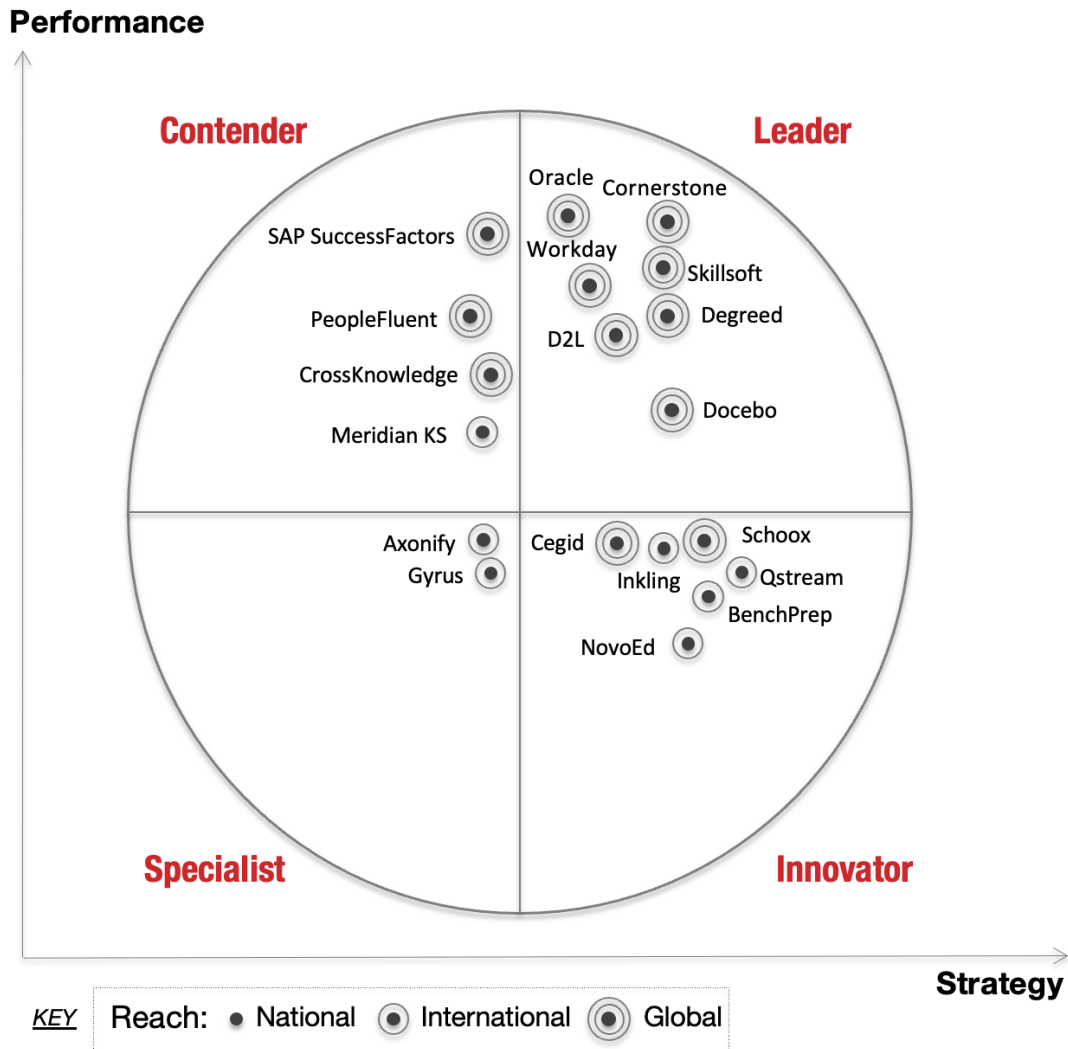


Figure 4: The Aragon Research Globe™ for Corporate Learning, 2023.

Leaders

Cornerstone OnDemand

Cornerstone OnDemand (CSOD) was acquired by Private Equity firm Clearlake Capital in a \$5.2 billion deal and named Himanshu Palsule as its new CEO in January 2022. As CSOD became a private company, the appetite for acquisitions increased. In 2021, CSOD announced it was buying both Edcast and SumTotal Systems for undisclosed amounts. CSOD now has four install bases that it serves: Cornerstone, Saba, SumTotal, and EdCast. This comes on the heels of its merger with Saba Software in 2020. With all of its acquisitions, Cornerstone has one of the largest install bases of talent management and learning in the industry.

CSOD offers both LMS and LXP functionality, as well as a full talent management platform. With a focus on end-to-end learning support, CSOD offers the ability to create your own learning content and has been focusing more on reselling learning content. Learning content has become a growing revenue channel for it. Its new Content Studio will enable users to find, create, and deliver content from any source.

With traditional LMS and LXP functionality, a full set of talent modules, as well as robust content authoring via Cornerstone Create, Cornerstone is a full modern learning platform that can deal with onboarding and basic and advanced training requirements. With the integration with Cornerstone's Skills Graph, organizations receive a boost to their upskilling initiatives.

CSOD has a heritage in learning and often leads with that, but over the years it became a full talent management platform as well. It is now shifting to also offer employee experience. In October 2022, CSOD announced its Talent Experience Platform, which will be available in 2023. It features an 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, combined with the CSOD Learning platform, positions the newly integrated company to offer both basic skills and advanced learning journeys. Additionally, Cornerstone Insights offers predictive analytics dashboards across the talent management suite, including learning. Having absorbed Saba, CSOD, with its LMS/LXP and Content Anytime, now offers enterprises both infrastructure and learning content to help them focus on their learning needs.

Strengths

- Talent and learning platform
- Compliance enablement at scale
- Video and mobile learning
- Content offerings and delivery
- Content creation
- Predictive analytics
- Marketplace for apps

Challenges

- Reconciling multiple overlapping product families

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 professional development that attracts and keeps 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 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 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 enable any content creator 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 unique 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

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

Challenges

- Market awareness outside of higher education

Degreed

Degreed brought back Co-Founder David Blake as CEO after buying his new mastery-based learning start-up, Learn In. The firm also announced that it had recruited industry veteran David Carter as its CRO (ex-Cornerstone sales leader) and made a series of other executive hires, including new CPO Nag Chandrashekar (ex-Saba product leader). Degreed raised a Series D round in April 2021 of \$153M and total funding now totals \$411M.

Degreed helped to pioneer the focus on skills development via learning and on-the-job development experiences. Degreed offers skills management and measurement tools, as well as curated learning experiences that include on-the-job development opportunities like tasks, projects, and stretch assignments as well as content. The Degreed skill analytics provides a solid set of insights into what people are learning and where the experts are. The Degreed mobile app makes it easy to take courses or other learning resources on the go, and its personal sign-up option is a great way for enterprises to get started.

In December 2022, Degreed completed the acquisition of Learn In, which had been founded by David Blake. Learn In compliments the Degreed platform. It 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 aggregates content from multiple sources, including CrossKnowledge, Cybrary, DataCamp, Great Learning (India), LinkedIn Learning, KES (Brazil), OpenSesame, Pluralsight, Skillsoft, and The Ken Blanchard Companies. It also can access user-generated content, including paid and public sources, like blogs, videos, and podcasts. Degreed has expanded its capabilities to allow for extended enterprise deployments. It now allows for training across organizations, meaning a number of organizations can be connected in one extended enterprise instance of Degreed.

Degreed has a solid and growing set of basic LMS capabilities, and it is continuously adding additional capabilities via its partnerships with LMS partner LearnUpon. 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. In May 2022, Degreed announced that its LXP was available in the SAP online store. This is an expansion of the partnership that Degreed has had with SAP SuccessFactors. And in October 2022, the company also became a Select Partner in Workday's Software Alliance Program, making it one of only a handful of vendors Workday is collaborating with on its Skill Cloud.

Strengths

- Learning experience
- Content partnerships
- Skill measurement and management
- Mobile app
- Market awareness

Challenges

- Dependence on LMS partners

Docebo

Docebo has continued to grow at a double-digit rate since its December 2020 IPO. Docebo also announced a new CMO, Ryan Brock, and Chief Sales Officer, Nina Simosko. Docebo launched a new updated Learning Suite in March 2021 that includes the Docebo Learn LMS, Docebo Content—an off-the-shelf content library, Docebo Shape, a content creation tool that leverages AI and Docebo Impact, which measures the effectiveness of the Learning deployment.

In October 2021, Docebo expanded its product portfolio with the addition of Docebo Connect, which helps to streamline integrations with other applications, and Docebo Flow, which allows Learning to be surfaced with either employee or customer-facing applications. Docebo also continues to offer Docebo analytics as part of its Learning Platform.

Docebo also announced that it is offering AWS Skills Builder Subscriptions that are powered by Docebo. In January 2022, Docebo acquired Skillslive, a Learning Consulting firm in Melbourne, to expand its APAC presence.

Docebo Content continues to support LinkedIn Learning, GO1, and many others. 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.

Strengths

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

Challenges

- Balancing OEM vs. direct sales

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 microlearning 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 its 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 organizations of all sizes, 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

- Personalized learning journeys
- Video learning
- Communities
- Investment in AI
- Overall strength of HCM and talent suite
- Extended enterprise

Challenges

- Awareness outside of Oracle install base

Skillsoft

Skillsoft is now a public company, and it continues to buy and sell assets to lead in learning experiences. In April 2022, Skillsoft completed its acquisition of Codecademy with a purchase price of \$525 Million in cash and stock. Codecademy fits into the mastery-based learning trend, and it now will enable more IT Pros to enhance their development skills. Before Codecademy, Skillsoft had added Global Knowledge, which added to its ability to deliver instructor-led training.

In June 2022, Skillsoft announced that it was selling its SumTotal Systems unit to Cornerstone OnDemand for \$200 M. The SumTotal Sale should help to cover the cost of the Codecademy acquisition.

Skillsoft leads with its Percipio learning platform that offers both LMS and LXP functionality. It offers one of the most robust sets of learning content. Skillsoft has microlearning video content and 1000+ skill-based and role-based learning paths, including compliance, leadership development & business, and technology & developer, which now supports multiple languages.

Besides its own growing library of off-the-shelf content, Skillsoft also has partnerships with AlertDriving, BizLibrary, Coursera for Business, Cybervista, GoFluent, getAbstract, Interskill Learning, HSI Vado Learning, Udacity, and Udemy Business.

Skillsoft helped to pioneer learning assistants with its Percipio 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, the amount of learning content offered, which includes certifications for cloud and many other IT certs, makes Skillsoft one of the largest providers of off-the-shelf content for both skills and mastery-based content.

Strengths

- Install base
- Consumer-grade user experience
- Learning assistant (ELSA and SIA)
- AI personalization and digital badges
- Mobile iOS and Android apps
- Video-based microlearning
- Curated learning journeys (Aspire) aligned to skill ontology
- Nearly 500 skill benchmarks to track proficiency and growth across a range of business, leadership, and technical topics
- Skill analytics dashboards
- FedRAMP certification
- Robust content library
- Blended learning with both instructor-led and coaching offerings

Challenges

- Rationalizing the integration of recent acquisitions

Workday

Workday, based in Pleasanton, CA, and led by Co-CEOs Aneel Bhusri and Carl Eschenbach, focuses on human capital management (HCM), talent management, learning, and financial services. In learning it is seeing growing success by offering learning as an add-on service to its large install base of HCM customers.

Workday Learning 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 to allow developers to offer unique Workday-based apps.

It also unveiled new offerings to support its new experience strategy: Workday Engage, an initiative focused on delivering personalized experience across devices; Workday Everywhere, which allows associates to view learning courses from Microsoft Teams or Slack; and Workday Empower, which will focus on personalization using machine learning. Workday also offers integrations with both Degreed and Skillsoft.

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, we expect that demand for its learning offering will continue to grow.

Strengths

- HCM install base
- AI personalization and digital badges
- Overall focus on skills
- Microsoft Teams integration
- AI personalization and digital badges
- Learning journey
- Blended learning

Challenges

- Balancing focus on learning vs. HCM and financial services

Contenders

Wiley CrossKnowledge

CrossKnowledge, a leading professional learning brand wholly owned by Wiley, and part of one of the world's largest publishers and a global leader in research and education, is based in Suresnes France, and Minneapolis. CrossKnowledge offers a learning experience platform, a growing library of in-house developed learning content, and its new Facilitated Learning, which was announced in December 2022. CrossKnowledge Facilitated Learning offering provides facilitators for live discussions as well as featured content. The initial focus of the Facilitated Learning offering is on empowering key talent with the right capabilities to navigate today's business challenges and unlock their full leadership potential.

The CrossKnowledge product offerings include its LXP, a full set of APIs, Learning Analytics, and a full e-Learning authoring platform. 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 growth IQ and personal development. The recently launched Facilitated Learning experiences are cohort-based and facilitator-led, designed to deliver outcomes thanks to an expertly-designed blend of CrossKnowledge learning capabilities.

CrossKnowledge has been able to leverage its learning suite platform to take advantage of the growing demand for extended enterprise training for customers and partners. Part of the appeal is the platform, the content, and the portal customization features. 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.

Strengths

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

Challenges

- Market awareness in North America

Meridian Knowledge Solutions

Meridian Knowledge Solutions, which continues to be led by Founder and CEO Jonna Ward, offers its learning platform to markets that include public sector, state, and local, and extended enterprise. The Meridian LMS™ is a modern learning offering that is fully mobile-enabled and offers responsive design, intuitive user experience, certification capabilities, eCommerce support, gamification, microlearning, and career development. Meridian can also be deployed in the cloud, on-premise, or through a hybrid model.

Meridian helps enterprises with its focus on core learning, compliance, and training inside and outside of the enterprise. Meridian 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 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.

Meridian leverages extensive partnership networks, which include OpenSesame, BizLibrary, Vado, and Vivid. For content authoring, Meridian partners with dominKnow. With its heritage of selling to defense, federal, and state and local government buyers, Meridian now also focuses on Construction and Engineering, Energy, Financial Services, Life Sciences, and Manufacturing.

Strengths

- Extended enterprise
- Content creation
- Compliance (government & commercial)
- Mobile-first learning
- Integration capabilities (APIs & web hooks)
- Scalability & security
- Cloud or behind the firewall
- Extensive support for multiple domains

Challenges

- Market awareness outside of the US

PeopleFluent

PeopleFluent, a wholly-owned subsidiary of the Learning Technologies Group (LTG), offers a full modern learning platform that includes LMS, LXP, and learning analytics. PeopleFluent also offers a full talent management suite that includes compensation, performance, recruitment talent mobility, succession, and org charting.

PeopleFluent focuses on a learning experience that is delivered through integrations with other components from the LTG portfolio, including Watershed LRS (advanced analytics), Instilled (visual and collaborative learning), Gomo (authoring), and Rustici Software (native course launcher). 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. Finally, PeopleFluent continues to offer video content creation, delivery, sharing, search, and embed tools. PeopleFluent has created a rather fluid way for companies to embed content from anywhere and export and embed content anywhere and still track learner metrics—formally and informally.

Strengths

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

Challenges

- Market awareness outside of North America

SAP SuccessFactors

SAP SuccessFactors is the human capital management (HCM) part of SAP. SAP SuccessFactors offers core HCM functionality, such as talent management, which includes its learning platform. It is branding its effort as Human Experience Management. Since 2020, SAP SuccessFactors has also offered its SAP SuccessFactors Work Zone, which is essentially a digital work hub that also includes learning.

SAP SuccessFactors offers SAP Content Stream, powered by Skillsoft. SAP SuccessFactors Learning focuses on employee development. Because of the overlap between SuccessFactors Learning and SAP Litmos, in July 2022, SAP announced that it was selling its Litmos Learning offering to Francisco Partners. SAP also leverages capabilities from its SwoopTalent acquisition, which will help provide more customized employee journeys with its talent data intelligence capabilities.

In 2022, SAP SuccessFactors launched a growth portfolio, a dynamic that allows employees to showcase their capabilities. It also announced a skills ontology, which uses AI to identify employee capabilities based on job, skills, and accomplishments.

In May 2022, SAP also began to offer Degreed 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, as part of a bundled HCM offering or part of Workzone. Its focus is on encouraging an open ecosystem so organizations can take advantage of new innovations and easily integrate the best combination of solutions to make their employees successful.

Strengths

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

Challenges

- Balancing focus on learning versus talent and HCM platforms

Innovators

BenchPrep

BenchPrep, based in Chicago and led by CEO Ashish Rangnekar, focuses on mastery-based training for enterprises and associations. BenchPrep's LMS is purpose-built for test and certification preparation, using confidence-based learning and adaptive learning pathways to help learners feel confident going into their exam or certification test. 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. In 2021, BenchPrep enhanced its reporting and data visualization tools via a partnership with Snowflake.

BenchPrep leverages integration with BigCommerce to enable a more seamless way for enterprises to offer extended learning capabilities with 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.

In April 2022, BenchPrep and PMI announced that BenchPrep would power the PMI Study Hall, a companion 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

- LMS capabilities
- Mastery-based learning approach
- Omni-channel delivery
- White label
- Upskilling
- Reporting
- Advanced analytics
- Test and certification preparation

Challenges

- Market awareness

Cegid

Cegid, based in Paris and led by CEO Pascal Houillon, focuses on Retail Solutions and HR & Talent Management. It has made Talentsoft its lead offering in its Human Resources business unit. Talentsoft, is based in Paris and has a growing client base in HR and Learning across France, the UK, Germany, and Northern Europe. With Cegid's 2019 acquisition of Meta4, it expanded its HR footprint in Southern Europe and Latin America. Cegid now offers Core HR, Talent Management, Talent Acquisition, and Learning.

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

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. With its embedded learning content management system (LCMS), enterprises can manage their course updates on a local and global basis.

Given Cegid's focus on Retail, Finance, Tax, and overall compliance, buyers of those solutions will be adding the Cegid, HR, Talent management, and learning offerings. Given the growing focus on Industries by major application providers, Cegid's strategy positions them well for the future.

Strengths

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

Challenges

- Balancing focus on retail vs. talent management

Inkling

Inkling, which focuses on providing a mobile-first, modern learning platform for distributed workforces, made leadership changes in January 2022 with the appointment of Mike Parks as CEO and Jim Pearson as CFO. Inkling focuses on learning for employee experience with a focus on find, learn, and do, which is more forward-looking than the traditional teach-and-test approach. Inkling leads with an intuitive mobile-first experience for both iOS and Android devices.

Inkling's core product, Inkling Knowledge, enables dynamic content creation and distribution for all learning content and organizational knowledge, including intelligent search, making it ideal for just-in-time performance support and content that is always current. Inkling also offers its InkForms product that enables clients to build operational checklists with embedded learning.

Inkling enables the creation of highly interactive and visual content for on-the-job learning that includes real-time performance support around strategic and mission-critical content. It also supports operational processes, which replace legacy operation manuals, training guides, and job aids for operations that often involve repetitive tasks.

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, avoiding the need to create and manage SCORM packages and resulting versioning issues. Inkling's focus on operations and knowledge positions it well for the future.

Strengths

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

Challenges

- Awareness outside of North America

NovoEd

NovoEd, under the leadership of 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 is also 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. Its market focus is on enabling large enterprises to deploy employee upskilling, leadership development, design thinking, digital transformation, and onboarding programs at scale. In February 2022 NovoEd announced new Learning Journeys that allow learning experiences to be integrated together into pathways that are configurable and customizable for different groups of learners.

NovoEd now also integrates with Degreed so more enterprises can offer more skills-based courses. NovoEd offers an authoring environment that allows for the fast creation of learning content. NovoEd also offers native Mobile apps for iOS and Android. NovoEd offers 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

- Modern learning experience
- Social, team-based learning
- Mobile app
- Content authoring and curation
- Dashboards & analytics
- Collaborative learning
- Integration with content and video libraries

Challenges

- Market awareness

Qstream

Qstream led by CEO Dan Whelan, has continued to focus on its just-in-time microlearning platform, which it helped to pioneer. Given its 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 with 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. It 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 present 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, professional services that include content development best practices, instructional design services, program launch services, and translation services and integrations.

Strengths

- Microlearning platform
- Just-in-time knowledge delivery
- Life sciences install base
- In-depth proficiency and assessment analytics
- Scenario-based, job-specific learning
- Enterprise-grade mobile capabilities
- Professional services
- High user engagement
- Microlearning integration capabilities with other learning and work systems

Challenges

- Market awareness outside of North America

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, Schoox Vista Equity Partners made an undisclosed investment in Schoox. Before the Vista Equity investment, the total investment in Schoox had been US \$6.5M, Schoox bolstered its Management team in 2022 with the addition of Megan Younker as CMO and Andy White as CFO.

The Schoox platform offers Learning, Goals and Performance, Social Collaboration, Career Development, and Content Curation. 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.

Schoox has a growing number of content/courseware providers that include: Aller Train, Biz Library, KnowCyber, Mastery TCN, Restaurant Playbooks, StateFoodSafety, Traliant and Vado. Skills that they offer via partners includes Business Skills, Personal Development, Restaurants, Safety, HR Compliance, and industry-specific courses. Given its learning platform and its growing content partnerships, Schoox is one to watch in the corporate learning market.

Strengths

- Modern learning experience
- Social, collaborative based learning
- Content authoring and curation
- Dashboards & analytics
- Collaborative learning
- Integration with content and video libraries
- Management of complex organizational hierarchies suited for extended enterprise / franchises

Challenges

- Market awareness in North America

Specialists

Axonify

Axonify, based in Waterloo, Ontario Canada, and led by Founder and CEO Carol Leaman focuses on frontline worker learning and communications. In June 2022, Axonify announced it was purchasing Nudge, an employee communications firm. Axonify also offers learning for contact centers, finance and insurance, and telecom. Axonify offers its modern learning and communications platform that combines AI-based adaptive learning capabilities that also includes a library of off-the-shelf content sourced from a content marketplace.

In May 2022, Axonify announced 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.

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

Axonify Impact™ offers advanced analytics that uses AI and big data to measure the impact of training for programs delivered through Axonify's platform. Axonify's focus on frontline workers with a mobile-first approach continues to help it win new customers.

Strengths

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

Challenges

- Market awareness outside of North America

Gyrus Systems

Gyrus Systems has continued to focus on modern learning and offers the GyrusAim LMS, its flagship learning platform. GyrusAim offers a modern interface that includes gamification, social learning, and a responsive mobile HTML5 interface. GyrusAim capabilities include core ILT, learning path, e-learning, assessments, certifications, onboarding, gamification, social learning, webinar (Zoom, Slack, Microsoft Teams, etc.), performance/feedback, and more. Gyrus partners with Microsoft and Gyrus Cloud is available on the Microsoft Azure Marketplace.

In June 2022, Gyrus announced a partnership with Warp AR to offer Virtual Reality to create scenario-based VR training. Gyrus has content 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, along with bundled assessments.

Strengths

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

Challenges

- Market awareness outside of North America

Aragon Advisory

- Enterprises need to focus both on core skills and a mastery-based approach to learning. Business units need to partner with L&D to ensure that the right focus is put on learning mastery for critical jobs.
- Besides developing a robust learning content strategy, enterprises also need to have operational plans to refresh courseware each year.
- Microvideo for best practices around skills and how-to guides is expected to become an expectation by employees.
- Given legacy talent management suites, having more than one learning provider will become the new normal.

Bottom Line

The learning market has shifted, and learning is being offered both standalone and as part of either an employee experience platform or a talent management suite. The need for quality learning content falls upon both the business unit and the learning and development group. Given the need for this new approach to training and learning, enterprises will often find that they need to have more than one learning provider to meet all of their needs.

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.

Inclusions

The following technology providers were added for 2023:

- **Schoox**
- **Workday**

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.