

Learning Technologies and Platforms 2022 and Beyond



Overview

The corporate learning technology market is complex and constantly evolving (see Figure 1). In today’s world—with video everywhere, ubiquitous social networking, and AI embedded in every platform—the learning and development (L&D) market has started to adapt. While there are many new technologies available (e.g., xAPI, creator platforms, skills taxonomies, cohort and collaborative learning platforms, online coaching, and mentor networks), most organizations are moving away from systems that deliver just training and toward those that also drive business capabilities. And this means coupling online education and learning with skills development, practice, experience, and mentors.

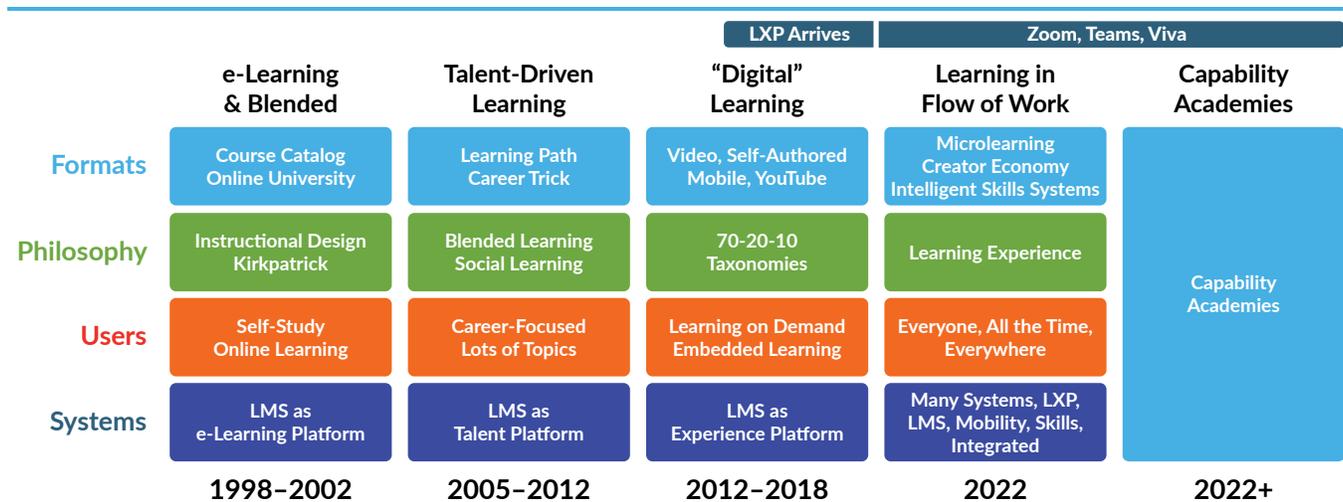
As most L&D professionals know, there are dozens of diverse ways to train people, and each method can be used for different purposes. While we want dynamic and compelling digital experiences, we also want access to experts, projects, developmental assignments, and support tools to help employees continuously develop and grow. In 2022, corporate learning is building systems that bring these approaches together in compelling and productive ways.

Keeping Up with the New State of L&D

Driven by this continuous innovation, L&D departments now have access to a variety of learning resources. We’ve found that the average company has around 22 different L&D tools and platforms, and this is not surprising. In many ways, the L&D tech stack is as complex as almost any other area of HR, including recruiting, which is similarly fragmented.

For vendors, keeping up with this rapidly developing market is a challenge. Most vendors who try to “do everything” often fall behind. Saba, for example, tried to build competency-based learning, performance management, and development tools, but it could not keep up. Cornerstone, PeopleSoft, Oracle, and SAP have all tried to build or buy all the pieces, but the ever-changing market makes it difficult for any one company to take the lead. This is because corporate training is one of the most creative, innovative technology markets in the world, and great companies are always adopting new tools. The metaverse is another new example: We now have virtual reality (VR) and augmented reality (AR) training available in many forms. Every time a new technology is invented, someone tries to use it for education and training.

Figure 1: The Evolution of Corporate Learning



Source: The Josh Bersin Company, 2022

Consider VR, AR, and the use of creator economy tools like TikTok and YouTube, activity streams like Twitter, cohort collaboration like Microsoft Teams, and video tools like Zoom, Webex, and Google Workspace. Every one of these tools is used for education and training, and this does not even include the tools available for video content indexing, translation, assessment, and prescriptive learning.

You will want to create a learning infrastructure that pulls the different pieces of the tech ecosystem together to help learners build needed skills and capabilities for the future (see Figure 2). This learning infrastructure will form the backbone of your overall learning strategy.

Choosing a Learning Strategy

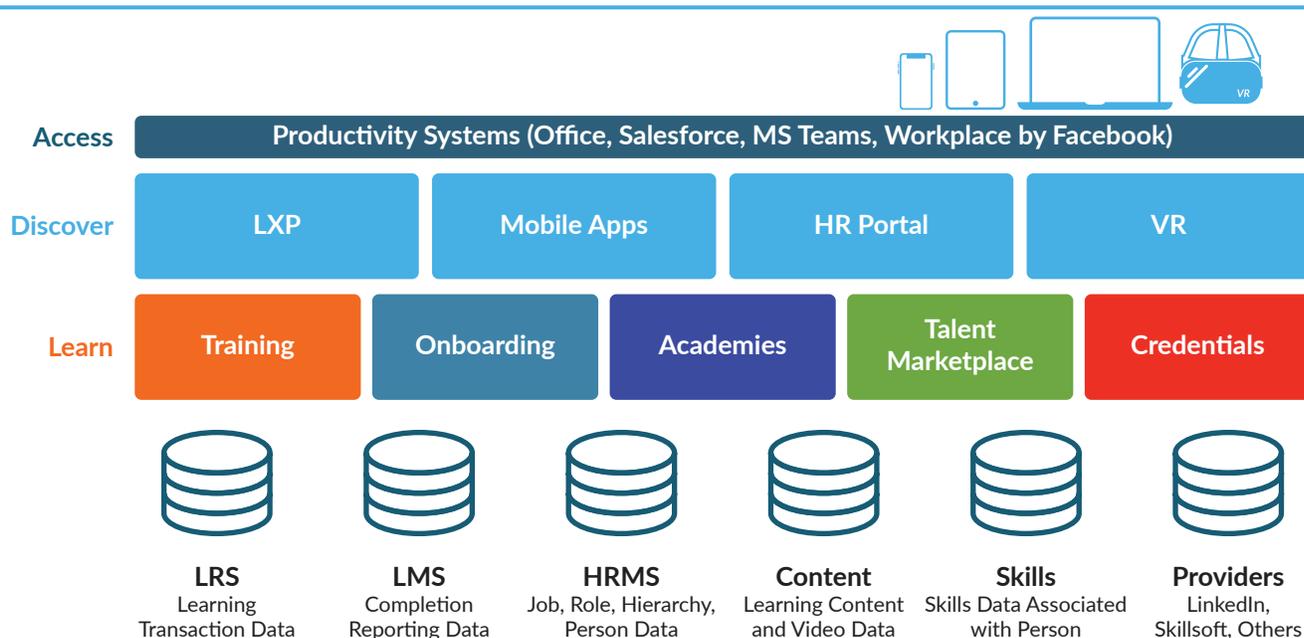
Your training department (or function) is going to have to make a lot of choices. You will have to decide how much self-study, video learning, face-to-face instruction, and other modalities you'll use. Do you want people to be certified or credentialed, and if so, how will you determine the criteria? Will you want people to develop and share content internally? Will you want to include online books and reference materials? How about the use of coaches, mentors,

or peers? Do you want to build career models and associate learning with the various career paths you develop? Will you build capability academies to focus on strategic functional or business areas?

The decisions you make will impact which vendors, tools, and tech you use, and each organization will have its own unique approach. In fact, we've visited and worked with hundreds of L&D organizations, and no two are the same. Some are highly centralized and structured. Some are highly decentralized and run by business unit or functional leaders. And the best will have a blend of both, using what we call a "federated" structure.

And, of course, each company has its own enterprise resource planning (ERP), human capital management (HCM), payroll, and other employee systems. So, the L&D "stack" has to fit into all of this. One point worth mentioning is all major ERP vendors have learning platforms. None of them are complete, nor will they ever be. Therefore, if you do decide to use the learning management system (LMS) or learning experience platform (LXP) provided by your core HR vendor, just remember that it won't be enough. The specialized providers will do more, and you'll want to look at them.

Figure 2: Learning Infrastructure



Source: The Josh Bersin Company, 2021

Getting Started

Effectively managing all these L&D technologies is challenging. To get you started, this report begins by breaking down all the layers of the L&D tech stack, which will enable you to understand all the programs, tools, and frameworks you need to consider. We then explain how L&D technology fits into the larger architecture of HR technology, which includes many areas (e.g., skills ontology or the talent marketplace) that touch on L&D. Once you are more comfortably positioned in this landscape, we then explain the various categories of L&D technology and platforms and list a few of the important vendors in each. Finally, we present an eight-step process on how to operationalize an L&D stack that will work within your own company.

Our courses in the Josh Bersin Academy and the SuperClasses offered as part of our corporate membership program will give you more details. We are here to advise, consult, and help you with your strategy. If you read this report and use the rest of the articles, podcasts, and help provided in our membership program, you'll become an expert. And this will help you grow your company's impact, grow your own career, and make your employees happier than ever.

If there's one thing we've learned over the years, it's that employees value learning as much—if not more—than money at work. So, if you create a fantastic learning experience and a scalable easy-to-use L&D technology stack, you'll be giving your company a critical competitive advantage.

The L&D Tech Stack: Breaking It Down

When choosing an L&D technology stack, there are essentially five “layers” of tools and platforms to consider. Our market overview begins at the bottom and moves up. We recommend referencing Figure 3 on the following page as you read about the different layers.

Learning Data Layer. The Learning Data Layer is at the bottom of the stack. If you think your general HR data streams are complicated, the L&D data set is even more so. We've engineered and worked with many L&D systems, and the data structures are complex, voluminous, and important. In

fact, as you get deeper into skills-centric learning, you're going to want L&D data streams as rich and interactive as the web data streams you get from your external website. Why? Because people use many different learning platforms, and each platform collects its own set of data. At some point, you'll want to bring this data together—both to understand what content is useful and to see why some programs fail and others succeed, what people are and are not learning, and what skills you have in your company.

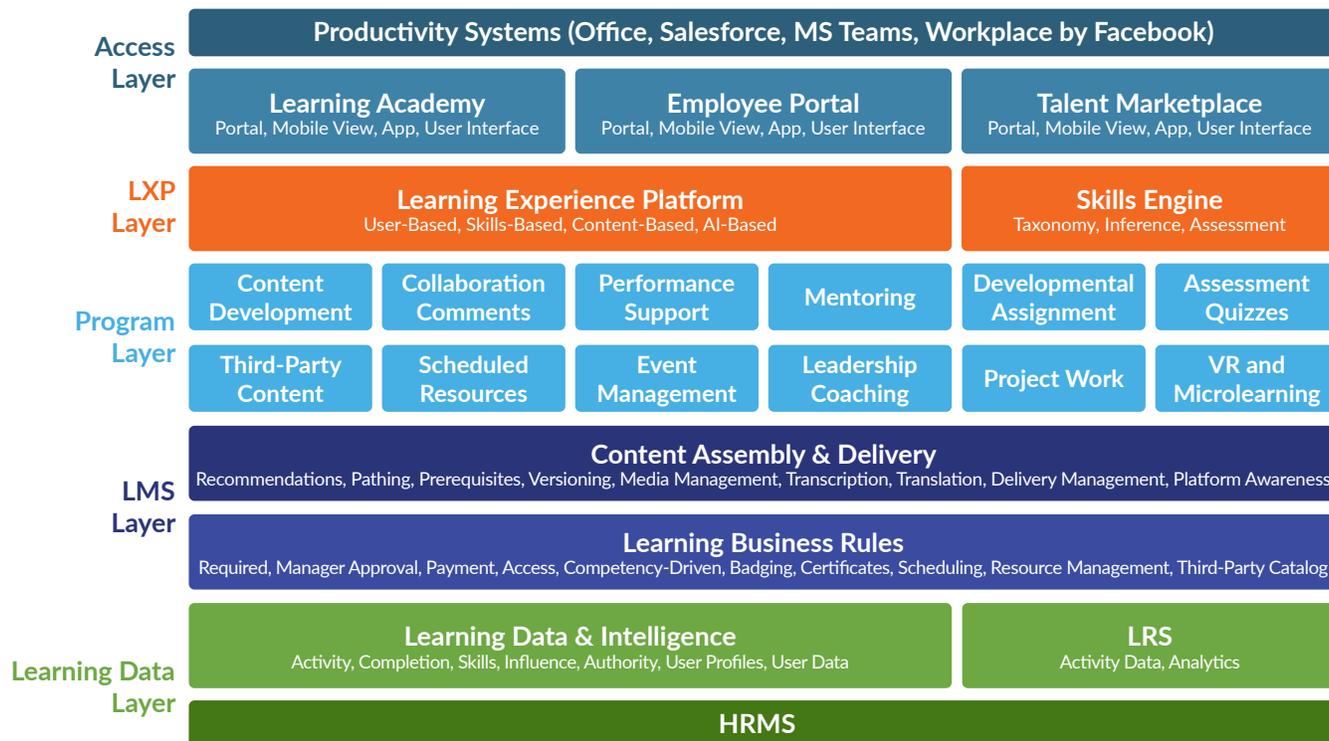
Most large companies have a learning architect who looks at the data. While it may seem like a lot of effort, this work is critical. Companies spend tens of millions of dollars to build, buy, and curate learning solutions, and without good data you never know what's working, what's failing, and how to make the experience better. Now that we have systems like LRS (learning record store) products that track and store xAPI statements, we can look at user behavior in detail and see who's doing what, how well they're learning, and the impact of this activity on their engagement, growth, and overall business results.

As new delivery technologies like VR, AR, and real-time video learning expand, you'll have a massive data set to analyze. VR vendors like Strivr, for example, can show you if a student avoided looking at another employee directly, was afraid or intimidated by a certain activity, or may simply not understand a concept because of their movements or physical dynamics. This type of data set will soon become critical to the analysis of your learning programs, demanding the use of xAPI and a robust data layer in your stack.

LMS Layer. Above the Learning Data Layer is the LMS Layer. This is where you schedule, administer, track, and manage all your curricula, programs, courses, and learning objects. Years ago, we thought the LMS did everything, but we know now that it doesn't. Today's LMS is a big fancy “ERP system of learning” that essentially “manages” the process. It includes business rules, e-commerce, learning programs and packages, and many features to help you add, delete, version, and manage content. And the LMS often includes scheduling and old-fashioned things like resource management (is that classroom available?).

Program Layer. Above the LMS Layer is the Program Layer—or what we used to call the learning delivery system. This is

Figure 3: The L&D Tech Stack



Source: The Josh Bersin Company, 2022

where you worry about how the program is structured, what role instructors play, how the collaboration works, and what types of interactions, assignments, submissions, practice, labs, or simulations you'll need. No platform does all this well. And despite the many good "program management" platforms on the market, when you find one you like, you'll also find something it doesn't do. But that's why we call it a "layer."

Many platform vendors start their business as learning program systems (they build a new way to deliver training, mix media, or integrate instructors or mentors into the process). Over time, these vendors tend to build more LMS features into their systems, some of which may integrate or conflict with your LMS.

LXP Layer. Above the Program Layer is the LXP Layer or Learning Discovery Layer. This is where the talent intelligence system (or skills taxonomy) fits in. Employees need a way to find, search, and discover the right learning program—that is, which courses, programs, and materials they need. Our past approach was to let people browse a course catalog (like a

university), but this never worked. And just having employees search on their own is no good either because most companies have dozens of courses with similar names. So, we need an intelligence system that arranges, recommends, and organizes learning content into paths and curricula. This is typically done in an LXP, and some amazing options exist.

Access Layer. Finally, above the LXP Layer is the top layer known as the Access Layer or Presentation Layer. This is where you find, discover, or access learning right in the flow of work. You can let people log directly into the LXP, or you can arrange the programs into a portal and create an online university, a functional academy, or even expose the content in your talent marketplace or employee portal. Now that we have learning in the flow of work tools (this space has come a long way), they can be accessed through Microsoft Teams, Slack, Salesforce, or just about any other system your employees use (e.g., the call center system, the nurse scheduling portal).

L&D in the Context of HR Tech

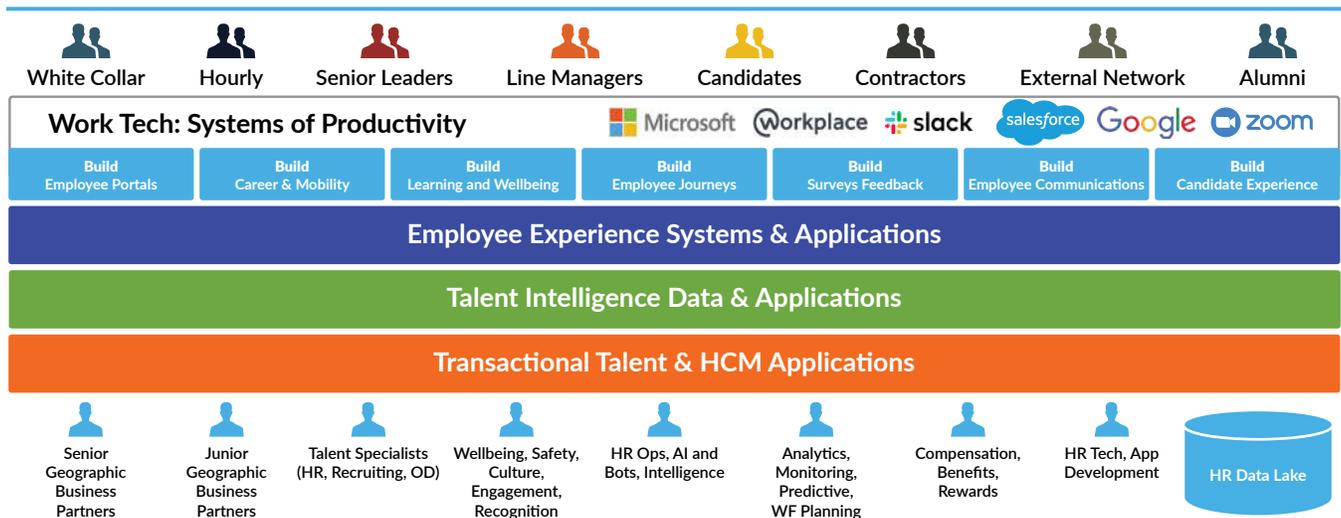
This L&D technology fits into a bigger architecture—the top-to-bottom HR technology stack. HR technology (see Figure 4) includes employee recordkeeping, payroll, benefits, wellbeing, performance management, succession management, many forms of employee communications, and a wide range of recruitment tools (like the stack of L&D tools).

Note the Talent Intelligence Data & Applications Layer in the figure below. This supports the organizational need for a skills ontology to help source, assess, and recruit candidates. And, more recently, HR technology began incorporating the talent marketplace, a platform for learning and internal career management that touches L&D on one side and recruitment on the other.

While L&D technology is complex and has many notable features, it is rapidly evolving into the new world of talent intelligence. Systems that collect, categorize, and infer skills (i.e., the talent intelligence platforms) are becoming standardized in companies, making it easier than ever to decide “who needs to learn what” and who has skills that could be useful for new or different jobs (see Figure 5 on the following page).

We have several research studies¹ and an in-depth podcast² that describe the importance of the skills taxonomy. Suffice it to say that this intermediate layer of technology has an enormous impact on your L&D toolset, and it has similar importance to recruitment, internal mobility, and eventually pay and rewards.

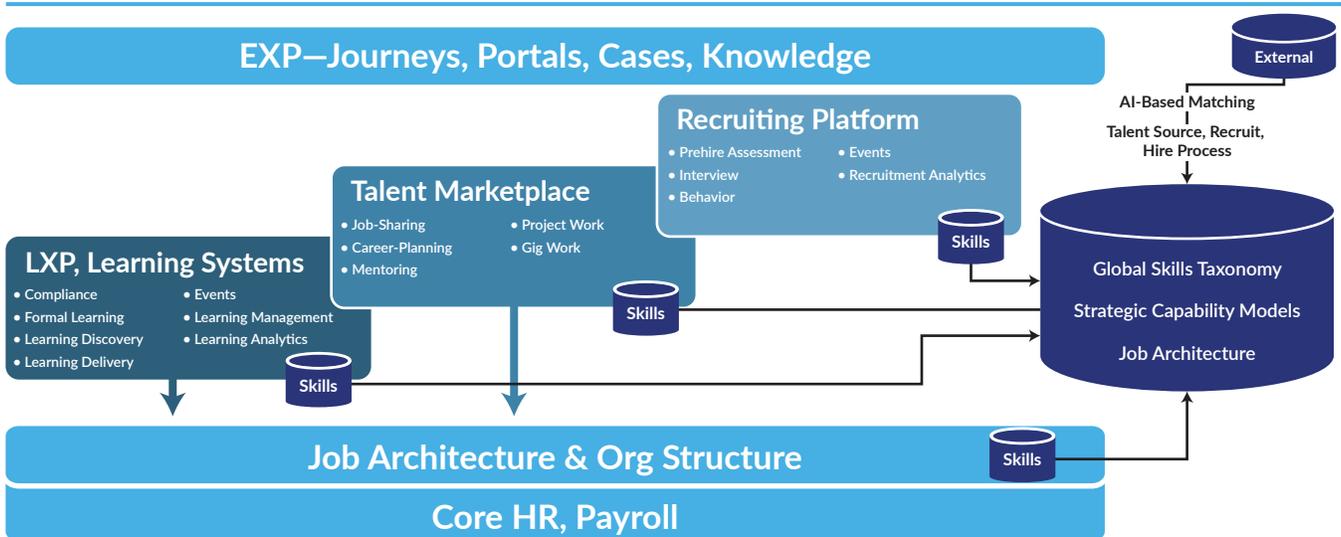
Figure 4: HR Technology (2022 and Beyond)



Source: The Josh Bersin Company, 2021

1 The New World of Talent Mobility: Flexibility Rules and The Rise of the Talent Intelligence Platform, Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, 2021.
 2 “What Is a Skills Taxonomy Anyway? Understanding the Market for SkillsTech,” Josh Bersin/The Josh Bersin Company, April 18, 2021.

Figure 5: The Talent Intelligence (Skills) Layer



Source: The Josh Bersin Company, 2021

Learning Management Systems

Learning management systems are the core administrative platforms for managing, tracking, scheduling, and administering all forms of training. These systems typically include resource management (scheduling events, reserving rooms, or books), curriculum management (prerequisites, pathways), management approval, e-commerce (for educational products and training sold to customers or partners), content management (use/reuse of content, videos, or assets), assessment (testing, scores), credentials (badges, certifications), and integration with many forms of content. Mid- to large-size companies need LMS platforms to manage all forms of training, and we consider these platforms a mandatory part of a company’s HR technology stack.

Adobe Captivate Prime

Adobe Captivate Prime is one of the most highly configurable and customizable LMS platforms on the market. Built on the Adobe technology base, it can be fully customized to fit into any website and lets companies build LMS applications for employees, customers, channel partners, resellers, or other stakeholders with a fully “liquid” interface that can be highly tailored and completely modified as needed. Like Totara, it is an HTML-enabled LMS with total configurability.

Bridge (LTG)

Bridge is one of the most well-designed LMS platforms for mid-size companies. It was built as an independent platform (now owned by LTG) with an advanced social system and employee experience platform. While many customers use Bridge for its learning features, it is also an integrated talent management application that can be used for performance management, collaboration, and general employee management.

Brightspace by D2L

Brightspace by D2L (previously Desire2Learn), a comprehensive LMS built to support academic education, includes many technologies for collaboration, authoring, and end-to-end learning management. Associations and other nonprofit organizations also find the platform to be particularly useful.

Cornerstone

Cornerstone is the world’s largest LMS and integrated talent management software company and includes the acquired companies Saba, Halogen, Grovo, and others. Cornerstone, founded more than 20 years ago, has deep levels of functionality for all aspects of compliance and curriculum management and is often used for talent management. The company’s recent new product Cornerstone Xplor is an LXP and includes an integrated skills taxonomy. Prior to Workday’s introduction of Workday Learning, Cornerstone partnered with Workday (and ADP), but it is now an integrated platform provider.

Docebo

Docebo is now one of the largest and fastest-growing LMS platforms on the market. The company's product was designed to manage training as a "product" and is widely used for customer education, channel training, sales and service training, and other "training as a business" applications. It includes nearly all the features of other LMS systems as well as an integrated video authoring system, analytics platform, and in-depth social system.

HealthStream

HealthStream, which started its business as a healthcare-focused learning management company, now offers clinical certification, credentialization, and a wide variety of healthcare-related administrative services for large healthcare providers. HealthStream Jane is a digital assistant designed to help nurses and other clinical professionals learn about and better manage various patient outcomes.

Intellum

Intellum is an LMS designed for customer training, training as a product, and revenue-generating applications of e-learning and content delivery. The company has developed an entire methodology and set of services to help companies build out customer education and customer training businesses, which are typically different and separate from internal training management.

LearnUpon

LearnUpon is a robust end-to-end LMS that includes authoring tools used by mid-market companies to build internal and external learning solutions for employees, customers, and prospects. The Irish company was founded to make LMSs easy to implement, use, and operate.

SAP Litmos

Litmos (now owned by SAP) is a full-function LMS originally designed for customer and partner training and now widely used by mid-size companies for many learning applications. The LMS was built in conjunction with many content offerings, so it's designed for e-learning and integration with Salesforce and other systems and is deeply integrated into SAP platforms.

SumTotal

SumTotal is one of the more mature and high-functioning LMSs on the market. Its origins go back to early LMS products, and the platform is widely used for compliance, global training management, and many forms of career and curriculum management. SumTotal is now owned by Skillsoft, so it is integrated with Percipio (Skillsoft's LXP) and includes many features that are integrated with the Skillsoft content platform.

Totara

Totara is a sophisticated, highly scalable LMS built on Moodle (an open source platform). Totara is highly configurable and can be totally customized to meet the user experience demands of any organization. The functionality includes most LMS features as well as advanced features for customer training and revenue-generating training. Totara is particularly useful for smaller-budget large companies or organizations that want a fully customized solution.

Valamis

Valamis is a highly scalable learning platform designed for many complex and content-driven learning applications sold as an integrated system with consulting from Valamis. It includes many advanced features for learning management, content management, video management, user profiling, and integrated indexing of documents and other corporate sources of data.

Learning Experience Platforms

Learning experience platforms make up the portals, discovery systems, and integration points for most employee learning applications. These tools have replaced the LMS as the primary interface to learning for most companies, and they offer features to find, arrange, publish, recommend, and comment on learning. LXPs do not have features for authoring or content development, nor do they have features to manage complex learning programs—but they have become a vital part of an employee finding and recommending learning, and they are becoming important systems of record and skills databases for many companies.



Degreed is a pioneer in the field and the largest LXP provider in the market. The company offers integrated learning discovery, learning paths, a skills taxonomy, and features to find experts and credentialed people as part of the LXP. Degreed acquired Pathgather (early pioneer) and Adepto to build out a talent mobility offering. While not a talent marketplace, Degreed does integrate with most learning content providers and is an excellent solution for integrated LXP features.



EdCast is the second largest and fastest-growing LXP provider, offering most of the same features as Degreed, but with a more sophisticated skills engine, a skills design studio, embedded learning in the flow of work (browser plugins as well as a digital adoption platform), and a vast number of integrations with ERP, customer relationship management (CRM), and other platforms. EdCast is often viewed as a more advanced LXP platform than others, based on its roots as a technology-focused company.



LinkedIn Learning Hub is a new LXP provided by LinkedIn. Initially, it is being marketed as a free offering to gain traction, and it includes many of the core features of learning discovery, search, pathways, and self-publishing. Its skills taxonomy features are still in development, and it includes out-of-the-box integrations with LinkedIn Learning content, Skillssoft, Udemy, and others.



Viva Learning, Microsoft's new LXP and integrated learning in the flow of work offering, is likely to become a market leader in the next few years. Viva is a set of employee experience modules that are built into Microsoft 365 and Teams, so Microsoft Viva Learning is likely to be used out of the box by most Microsoft customers. Like other LXPs, it integrates with hundreds of content providers and includes a comprehensive integration with Microsoft Teams (recommending content, enabling collaboration and discovery, and more).



Skillssoft's Percipio is the company's new flagship learning platform designed to compete with most LXP platforms but primarily focused on Skillssoft content.



Wisetail is an enterprise and corporate learning platform originally designed for video-sharing and content distribution. It is now a full-fledged LXP with many LMS features and is widely used by mid-market companies and retail organizations.

Specialized Learning Platforms

Specialized learning platforms offer learning programs and content for specific and/or unique employee populations or use cases.



Allego is a similarly unique learning platform focused solely on sales. Salespeople need soft skills training, as well as product education, competitor information, special stories, and objection handling support as products and markets change. To support the needs of larger sales teams, Allego's platform manages many forms of training, support, and subject matter expert authoring.



Kahuna is a specialized but important platform designed to manage operational training. Many companies (energy, oil, and gas, manufacturing, healthcare, repair and service) need to carefully manage each employee's certifications, skills, and credentials. These employees need to be trained, certified, and observed (by a preceptor) on equipment, procedures, safety protocols, and much more. As equipment and processes change, they need to be "recertified" or they will "fall out of compliance." Kahuna does this exceedingly well.



Modal is an exciting new cohort-based platform for developing complex skills. It includes self-study, instructor-led learning, mentoring, teaching assistants, and cohort-based assignments. The company offers in-depth courses in data science and many other topics in the near future.



NIIT, one of the world's most advanced and successful L&D consulting and technology companies, can build or configure its learning platform to deliver custom solutions for just about any L&D challenge. It can also build world-class content, simulations, assessments, VR, and other forms of training.

Learning Content Providers

Thousands of content companies sell courses, programs, certifications, and trainings in leadership, management, technical topics, professional domains, and all areas of safety, compliance, diversity, and HR. While many of these companies are end-to-end libraries of content, others are more specialized. We recommend that organizations looking for a learning content provider initially license a general library of IT and technical topics and then focus their budgets on specialized providers that address their own companies' needs.



Coorpacademy is a specialized library of leadership and management content sold as an integrated solution. Its content is highly designed and leverages stories from many business leaders.



Coursera is an end-to-end learning content company that began as a massive open online course (MOOC) focused on publishing content from educational institutions. Its content, which is primarily authored by university faculty and well-known experts, tends to focus on technology, digital skills, engineering, and other hard skills. Coursera's courses are free to end users, and the company has a business offering that includes reporting, certification, and skills-based learning.



CrossKnowledge, owned by Wiley, is a specialized library of leadership, management, and other topics sold as an integrated solution throughout Europe and other regions of the world. The platform is also well known as an enterprise LMS with many advanced features for collaborative learning, career pathways, and access to Wiley books and printed material.

Emtrain

Emtrain is a video and assessment-driven learning company focused on diversity, inclusion, compliance, and management training. The company offers highly interactive online learning and benchmarking tools to help make diversity, equity, and inclusion (DEI) training meaningful, actionable, and effective.

getAbstract

getAbstract is the leader in a big market for online books, book summaries, article summaries, and other published material. The company has built a large and vibrant business selling this licensed material and should be considered an important add-on to any large learning solution.

LinkedIn Learning

LinkedIn Learning has a wide variety of video-based courses on topics ranging from IT and technology to leadership, management, and professional skills. It is one of the larger providers and covers a wide range of topics; however, its platform is limited in scope, and all courses are in the same video format.

O'Reilly Learning

O'Reilly is a book publisher that has pioneered the industry of education, books, and support materials for software engineers, engineering managers, and technologists. The company offers a vast library of technical publications and educational materials, and its learning platform is now widely recognized as one of the most up-to-date and advanced sources of technical education, articles, support, and labs.

Pluralsight

Pluralsight, one of the industry pioneers, is a leading provider of courses, certificate programs, assessments, and ongoing support for technical professionals, software engineers, engineering managers, and other digital professionals. The company is well known for its comprehensive skills assessments and multiple forms of education for digital and engineering professionals.

Skillsoft

Skillsoft offers one of the widest ranges of content, including IT, cloud engineering, soft skills, leadership, food safety, compliance, and diversity, among hundreds of other topics. Skillsoft packages its content in libraries and learning paths, regularly including live events and other content offered by experts. Skillsoft also offers a vast library of online books (Books24x7) to complement its courseware and partners with *MIT Sloan Management Review* for executive development.

Udemy

Udemy is a leader in today's large learning marketplace. The company offers a wide range of expert-authored content on leadership development, technology skills, cloud engineering, and professional business. Udemy Business, the company's flagship library of licensed content for business buyers, comprises the most highly rated (and specialized) content from its vast marketplace.

Learning Creator Tools and Platforms

Learning creator platforms provide employees or learning teams with the opportunity to create their own customized learning content. Doing so multiplies the expert reach from a small learning team to include all employees.

Articulate

Articulate is the leading provider of full-function e-learning content development tools, including Articulate Rise, a complete platform for program delivery. Many companies standardize on Articulate for content development across all their developers, which allows them to share templates, graphics, videos, and other instructional design materials companywide.

Fuse Universal

Fuse is a powerful video-centric learning platform designed to let L&D leaders and employees build video content and share it among teams, workgroups, departments, and other cohorts to build integrated training portals in many subject areas. It was originally developed as a social platform for video learning but has become a global leader in self- and professionally authored content distribution in retail, hospitality, telecommunications, and other distributed industries.

Inkling

Inkling, the industry leader in enterprise learning content management, provides a complete publishing system to build, version, distribute, track, and manage all forms of learning content. Using Inkling, companies can build a complete learning library that appears in written and instructional form, publishes beautifully, and can be updated at any time without republishing or redistributing content. It's a powerful tool for operational training, retail training, distributed documentation, and more.

360Learning

360Learning is a complete collaborative learning platform, optimized for content development by L&D specialists, employees, and experts. It offers one of the most successful program environments for building courses, managing students, offering feedback, and certifying and skilling people based on expertise inside your company. It rivals and exceeds traditional learning platforms in engagement.

Coaching and Mentoring Platforms

These platforms help connect people with coaches and mentors as well as enable the interaction and customary practices for the coaching and mentoring process.

BetterUp

BetterUp is an industry pioneer and the leader in AI-enabled coaching. The platform lets employees assess their needs, find a coach, and interact in coaching sessions—all managed within the platform. BetterUp has thousands of trained coaches online, and the platform supports coaching for leadership development, wellbeing, sales training, and many other applications.

CoachHub

CoachHub, which is similar to BetterUp, is building a large network of coaches and leveraging an AI-enabled matching system to help companies deliver low-cost coaching to supervisors, managers, and leaders around the world. The company has thousands of coaches in its network.

Chronus

Chorus is a mentoring platform designed to help companies match mentors to students within a company or network. It is a successful product used by many large companies to manage their internal mentoring and coaching networks.



Sounding Board

Sounding Board is a coaching network and coaching platform designed for leadership development. The platform, developed by an executive coach, optimizes the coaching process for both the coach and the coachee.



Torch

Torch offers a network of coaches and mentors in a platform designed for custom programs, leadership development, and other soft skills applications.

Other vendors in this market include Ezra (LHH), Coaching Zone (AIIR Consulting), CoachSource, Korn Ferry, and RHR (for C-level coaching).

Learning Program Platforms

In most cases, learning program platforms are integrated learning systems built by content companies to support their clients. They are often spun out as separate platforms in response to customer requests for more features and customization. While learning program platforms have some of the elements of an LMS—and for many organizations, particularly those with sales teams, customer service teams, or internal academies, they can be the entire learning platform—they do not have the robust business rules of an LMS, so in most larger companies they are used for specialized needs. What learning program platforms have in common are features for courses and curricula, path management, branching, exercises, and various interfaces for third-party content, custom content, or subject matter experts. They are often used for leadership development, professional education, or highly technical topics in which learners need to practice, submit exercises, or collaborate on projects.



Intrepid

Intrepid is a “high-stakes” collaborative learning platform often used for leadership development, soft skills, and PowerSkills programs. Like NovoEd, it leverages leader-led, self-study programs and can be configured in custom end-to-end programs for sales training, leadership development, and other high-fidelity custom programs.



NovoEd

NovoEd is an integrated platform designed for leader-led, self-directed learning that is often used for leadership development and other PowerSkills. The company is a spinoff of Stanford University’s executive education team, which built the platform for use with its executive education programs. NovoEd’s platform offers self-study, events, exercises, leader-led collaboration, assessment, and badging.



Nomadic

Nomadic (home of the Josh Bersin Academy) is a specialized platform designed for semisynchronous, cohort-based learning. Learners join scheduled programs, work through self-study experiences in teams, collaborate with each other, and leverage video, interactive exercises, a library of resources, and social networking. The platform includes learning journeys, badges, and easy-to-use compelling user experiences.



Torch

Torch is an integrated platform for leadership development that builds on coaching, mentoring, and custom content you can add to build a coaching-centric leadership program for your company. Torch built its platform based on coaching-centric learning, acquired Everwise, and then developed an entire learning platform that embraces content, assessment, assignments, coaches, and mentors.



Training Orchestra

Training Orchestra is a specialized “learning resource management” system designed to manage and optimize events, courses, programs, activities, and the many other moving parts of a learning organization. As companies build programs, events, and curricula, they must schedule, organize, and prioritize events, classrooms, waiting lists, and other resources. Training Orchestra is the leader in managing these complex learning resources.

Leadership and PowerSkills Learning Solutions

Many content companies focus primarily or exclusively on leadership development. These companies typically develop their own platforms and offer off-the-shelf content to help organizations focus their efforts on the massive need to support, train, upskill, and develop supervisors, managers, and leaders in building critical soft skills that we refer to as “PowerSkills.”³



DDI

DDI is the world’s leader in first-line and upper-level management development. For decades, DDI has built assessments, training programs (in-person and online), course materials, and other resources to help companies train new managers, first- and second-line leaders, and senior executives.



Executive Education from Universities

Virtually every major university from Stanford, Berkeley, and MIT to Cornell and Duke offer executive education programs on a wide variety of topics.



FranklinCovey

FranklinCovey provides management and leadership development programs as well as first-line leadership tools. The company offers both instructor-led and online training for leadership, sales management, and other productivity applications.



Harvard Business Publishing

Harvard Business Publishing is one of the larger, well-known leadership providers. The company has a large library of training and research content, a robust learning system (Harvard Manage Mentor), a self-study system (Spark), and a large library of assessments, case studies, and access to Harvard professors for education



Hone

Hone is a relatively new online live-video learning platform that provides for PowerSkills, leadership, management, and team leadership training. The company provides a library of courses and programs for managers and leaders, and its platform can be used for many custom programs.



The Ken Blanchard Companies

Ken Blanchard is a provider of leadership development programs, events, and workshops. The company’s core offering, *Situational Leadership*, is well known and widely used for first-line leadership development around the world.



Korn Ferry

Korn Ferry is a global executive search firm that also offers a wide variety of job and leadership assessments, leadership development, and leadership trainings. The company also provides executive coaching and has built a large library of validated job descriptions to help with career strategy and job architecture projects.

Other vendors in this market include Skillshare, Udacity, Duolingo (languages), edX, Codecademy (now owned by Skillsoft), and MasterClass.

³ “Let’s Stop Talking About Soft Skills: They’re PowerSkills,” Josh Bersin/The Josh Bersin Company, November 16, 2019.

Learning in the Flow of Work Platforms

These platforms help employees access learning from the tools and systems they already use in their daily work (e.g., Microsoft Office and Teams; sales management tools; or project management software).



Axonify is an adaptive learning platform designed to deliver microlearning in the flow of work. The company pioneered the idea of building content for microlearning and offering content on specific criteria on an as-needed, on-demand, or scheduled basis. Its platform is widely used for operational, safety, and sales training, as well as for other ongoing learning applications.



Fuse Universal is both an LXP, LMS, creator market, and learning in the flow platform. It's one of the leading systems for publishing, sharing, and tracking video learning. Fuse Universal is often used by companies that need operational training and want employees to author, share, and recommend content to others.



Mindmarker is a specialized learning platform that transforms traditional training content into microlearning to help employees learn in small chunks.



Spekit is a digital adoption platform with added features for workforce enablement, knowledge-sharing, document-sharing, and other types of digital training. It is also widely used for on-demand learning around various systems, applications, and other digital platforms.



WalkMe is a digital adoption platform (similar to Spekit) designed to deliver learning around digital applications like Salesforce, Workday, SAP, and other enterprise systems. It lets companies build custom workflows and learning solutions and tracks usage to help employees get real-time help, workflow advice, and learning as they use other digital tools.

Other vendors in this market include Qstream, Pendo, and Whatfix.

VR, AR, and Metaverse Solutions (Immersive Learning)

Not surprisingly, a growing number of mature and powerful VR, AR, and metaverse learning solutions are being developed. Now that Oculus (Meta) headsets are less than \$300 each, VR is a cost-effective way to deliver high-fidelity training for complex applications at scale.



Microsoft HoloLens is a software and hardware platform used for AR. The platform is now used by manufacturers like Mercedes and BMW to rapidly streamline manufacturing, repair, and other highly technical education challenges that face almost every industry.



Immerse.io is an emerging leader in enterprise VR solutions, with experience in energy, oil, and gas; financial services; and manufacturing. The company can import content and build VR solutions using a variety of current metaverse technologies.



Mursion, which pioneered the use of live avatars for soft skills (PowerSkills) simulations, is becoming the leader in this emerging space. Mursion's challenging and unforgettable experiences can be used to teach management, diversity, recruiting, and many other topics.

Strivr Labs

Strivr essentially pioneered the use of 3D immersive VR for all forms of operational, safety, and soft skills training. The company has extensive experience in almost every industry application, including retail, telecommunications, transportation, and manufacturing, and is now moving into soft skills and leadership development.

Talespin

Talespin offers an end-to-end immersive learning platform to help L&D teams build their own VR training solutions.

Virbela

Virbela creates virtual workplace and lifestyle experiences. This platform can be used for training, meetings, special events, academy sessions, and other types of group- or team-oriented virtual experience.

ERP and HCM Learning Solutions

These solutions are part of the broader ERP and HCM technologies, thereby removing the need to integrate into the learning platform. However, these solutions are typically not as comprehensive as the more specialized solutions.

Oracle Learning Cloud

Oracle Learning Cloud is an LXP-like learning platform that has been totally rebuilt over the past few years. Using its extensive experience in this market, the company has totally reengineered the platform to coincide with Oracle HCM Cloud. Oracle is not likely to develop a complete LMS offering, but when Oracle Learning Cloud is coupled with other Oracle products, it delivers a fairly complete solution.

SAP SuccessFactors

SAP SuccessFactors has one of the most robust L&D technology stacks in the ERP market. In the mid-2000s, SAP acquired Plateau, which at the time was perhaps the most complete LMS for compliance and regulatory training, skills-based certification, and development on the market. Since then, Plateau has been integrated into SuccessFactors and is now a complete end-to-end corporate training platform. To deal with the new world of skills-based content, SAP SuccessFactors is introducing a new Capability Center designed to leverage a new architecture for skills-based learning as well.

Workday Learning

Workday Learning began many years ago as a video-centric authoring and distribution system. Since then, Workday has built out a complete learning platform that includes career pathing, journeys, manager approval, and access to a wide variety of content. Due to its origins as a video distribution system, Workday Learning is particularly good at recommending and distributing video assets. Most Workday customers use Workday Learning, along with an additional LMS and other tools, to deliver a complete end-to-end solution.

Navigating the L&D Technology Landscape

The tools and platforms listed in this report are just the tip of the iceberg. As more vendors enter the market every day, how do you build an end-to-end solution for your employees (and customers)? The innovation is exciting, but our research shows that the most important criteria is to build the right end-user (employee) experience. Here are the steps to follow (see Figure 6):

1. **Clarify your goal(s).** To begin, you really need to understand what business and talent problems you're trying to solve. Is your goal to build an onboarding and new leadership program? To train sales and service people? Or is it to build an entire capability academy in safety, marketing, or HR? Each of these goals will have

a different solution. This means building a priority list of the types of programs, audiences, and compliance and business rules you want to address.

Most companies want to do everything—but since L&D technology is often optimized for particular use cases, you need to decide what's most important. Over time, as you achieve your first objective, you can extend the platform to do more.

2. **Consider your current L&D tech stack.** It's also important to consider what technology you already have in your tech stack. Often, the starting point isn't adding another layer of technology but examining your existing technology and peeling back the layers to see what really serves a purpose and what doesn't and letting go of the latter. This will ensure you aren't adding more complexity to the confusing maze of learning systems that already exists in your organization.

Figure 6: Eight Steps to Operationalizing the L&D Tech Landscape



Source: The Josh Bersin Company, 2022

Next, try to find technologies that will effectively integrate into your current tech stack. If you have an LMS, ERP learning system, or a massive investment in Microsoft technology, then you should look for systems that fit into this architecture. You don't want a fantastically elegant L&D system that can't share data and user experience with your company's other systems.

3. **Carefully review your content strategy.** Where will content come from? Do you want to buy libraries of content and use off-the-shelf programs? Are you in a company or industry that needs a custom program? If so, will these programs be developed by an internal team or an external provider? What level of tracking, testing, and credentials do you need? And how will you accommodate content developed by your own subject matter experts, trainers, and leaders?

In many cases, the content strategy will drive the platform(s) you select. Retailers and hospitality companies, for example, need many small programs to teach people operational processes. A video-based learning platform like Fuse Universal is perfect for this. Oil and chemical companies, which need regulatory compliance training, will look to solutions like SAP SuccessFactors or Cornerstone or to their current ERP provider.

4. **Focus on employee experience.** How will employees find, locate, and consume the training? Do you want them to go to a portal or university learning hub? Would you like them to access training on your existing company website? Do you want them to learn on MS Teams or Slack? Or do you want the learning to appear and configure itself within your Workday, Oracle, SAP, or other HCM system?

These decisions are all up to you. Many companies deliberately create a "learning destination" and put all their L&D tech on that platform, while others want learning to be available to employees right in the flow of work.

5. **Discuss vendor criteria.** Every vendor in the market is different. Some are small startups with limited resources, and others are big companies with enormous infrastructure but limited ability to change or customize

their systems. Some vendors come from consulting firms that can configure, integrate, and customize the system.

Get to know the vendor. Talk with their references. Ask to meet the CEO or head of product. These meetings will help you learn about the vendor's mission, goals, culture, and way of doing business.

6. **Establish a governance team.** Learning solutions are complex and have a widespread impact on the people in your organization. It's, therefore, important to create a learning council or steering committee so you receive regular input from stakeholders. If you're training salespeople, for example, you want the head of sales enablement involved. If you're buying IT training, you want the CIO to be part of the selection process.

Many training platforms are used not only by employees but also by customers and channel partners. This often leads to multiple systems with different requirements. Make sure representatives of these user groups are included in your steering committee so you can align on common tools and other technology needs.

It's also important to bring in the head of HR technology, your HR business partners, and your HR service center(s) or service delivery team. They will use, support, and manage much of the training, so they should be involved in and notified of your progress.

The work of the governance team should be ongoing, with annual budget meetings, quarterly status reviews, and monthly meetings to review progress on content, feature rollouts, business rules, and the launch of new programs.

7. **Find a learning architect.** If you work for a larger company, you will need a technical person to help. L&D technologies are complex, and each has its own technology, feature, and design characteristics. Good L&D technologists have a deep understanding of these systems. They will help you make sure the pieces fit together and you have the right level of integration between the LMS, other platforms, and various forms of content.

- 8. Implement and roll out.** As you prepare to implement your solution, you must flip your L&D team into an agile, design-thinking operational mode. You should define employee personas, understand your service delivery model (who will do what once the system goes live), and involve your HR business partners in the process.

In most cases, it's best to start with a pilot, see what's working in a particular user group, and then add more features and audiences. Consider using the same principles through a minimum viable product (MVP) approach when implementing an L&D tech solution. Launch to a small, diverse pilot group of testers with the intent of creating a success story that other teams will want to follow. In case the testing results reveal that the solution does not meet your needs, consider it a breakthrough and not a setback because that is the whole idea of MVP testing.

Use the test results to reroute, return to your shortlisted solutions, and relaunch more informed testing. Adjust the MVP based on test results, and gradually expand the scope to the entire organization. Like any other process, change management and communication are key. Our *Change Agility Playbook*⁴ can guide you through this piece in detail.

⁴ [The Big Reset Playbook: Change Agility](#), Josh Bersin, Kathi Enderes, PhD, and Nehal Nangia/ The Josh Bersin Company, 2021.

Any tech implementation is an ongoing process, just like maintaining a house. There will always be something that needs to be adjusted or fixed as you start living in the house and better understand your needs and preferences. Audit your technologies, new and old, at least once a year to get an idea of what still serves a purpose and what needs to change. The same principles of decluttering a house also apply to organizing your tech stack. Keep it simple, keep it clean, and keep what serves a purpose.

We Are Here to Help

Corporate members of The Josh Bersin Company can take advantage of much more in-depth information, case studies, capability accelerators, organizational audits, advisory services, and workshops to help maximize your technology investments and advance your talent priorities. We also offer strategic guidance on this topic that will help you answer critical questions at each stage in the process, enabling you to make the right decisions and successfully operationalize your L&D technology implementation strategy.

About the Author



Josh Bersin

Josh founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. He expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership and became a recognized expert in the talent market. Josh sold the company to Deloitte in 2012 and was a partner in Bersin by Deloitte up until 2018.

In 2019, Josh founded the Josh Bersin Academy, a professional development academy that has become the "home for HR." In 2020, he put together a team of analysts and advisors who are now working with him to support and guide HR organizations from around the world under the umbrella of The Josh Bersin Company. Recent research covers topics such as hybrid work; HR technology market trends; employee experience; and diversity, equity, and inclusion. He is frequently featured in publications such as *Forbes*, *Harvard Business Review*, *HR Executive*, *The Wall Street Journal*, and *CLO Magazine*. He is a popular blogger and has more than 800,000 followers on LinkedIn.

The Josh Bersin Company Membership

Members of The Josh Bersin Company have exclusive access to all research reports, case studies, definitive guides, and market studies. Research-based tools including maturity models, frameworks, strategy guides, and assessments help members take action.

To ensure personalized relationships, members have assigned client success managers to maximize the value of our offerings and facilitate connections with analysts and advisors. Members also can take advantage of our upcoming SuperClass Series, courses designed specifically for leaders and senior professionals to address major HR challenges such as organizational design and scaling corporate learning.

The company's Insights events give members early reviews of upcoming or just-published reports as well as deep dives into specific topics of interest. Members can also participate in the Big Reset, an initiative started at the pandemic's onset that offers senior leaders the opportunity to collaborate and share experiences related to the business and workforce challenges of the moment.

For more details, email info@bersinpartners.com.