# Learning Content Platforms Buyers Guide

## Software Provider and Product Assessment

**EXECUTIVE SUMMARY**

# Learning Content Platforms

Learning Content Platforms (LCPs) have moved beyond the era of "more content equals more value." Enterprises have realized that abundant libraries do not guarantee impact; learners still struggle to find relevant material, and leaders still question ROI. The market response has been clear: Platforms not only aggregate content but also deliver, personalize and measure it. These solutions promise faster time to relevance, fewer integration headaches and actionable insights for L&D teams under pressure to do more with less. By 2028, self-directed career pathing will be utilized by one-half of enterprises using digital learning platforms to dynamically identify skill gaps and learning plans to ensure worker retention and trust. This shift underscores the growing expectation that content platforms must enable measurable, skills-aware learning journeys rather than simply provide access.

> ## Learning
> **Market Assertion**
>
> By 2028, self-directed career pathing will be utilized by one-half of enterprises using digital learning platforms to dynamically identify skill gaps and learning plans to ensure worker retention and trust.
>
> **Matthew Brown**
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>
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ISG defines Learning Content Platforms as applications that provide access to licensed or curated learning content combined with native platform capabilities for delivery, personalization and analytics. These platforms allow enterprises to license content from external providers while delivering and tracking it through embedded learner-facing features and reporting tools. Delivery typically occurs through the provider's own interface, though most platforms also support integration with learning management systems (LMS) or learning experience platform (LXP) environments. This category excludes vendors that only offer static or unstructured catalogs and excludes LXPs where the primary value lies in experience orchestration rather than embedded content delivery and data. In short, LCPs exist to make content usable and measurable, not merely available.

The market has bifurcated into two clear lanes: content-only services designed to plug into an LMS and platforms that pair content access with proprietary learner experience and analytics. The latter is where innovation is concentrated. Providers are investing in artificial intelligence (AI)-assisted tagging to enrich metadata, search engines that respect roles and skills and dashboards that reveal which providers, formats and topics deliver the most value. Increasingly, these platforms adopt an open stance—supporting standards and APIs—so buyers can consume content natively or route it into existing systems without friction. This evolution reflects a broader enterprise priority: reducing vendor sprawl while improving visibility into what works.

Historically, content strategy revolved around catalog size. Organizations licensed multiple libraries, often from different providers, and relied on LMS integrations to make content available. The result was predictable: uneven adoption, redundant assets and limited insight

into effectiveness. The rise of LCPs marked a turning point. By combining content access with delivery and analytics, these platforms gave L&D teams a way to curate intelligently, personalize at scale and demonstrate impact without deploying a full LXP. Today, the conversation has shifted from "how much content do we have?" to "which content moves the needle on skills and business outcomes?"

Enterprises now expect more than access—they expect alignment. Leaders want proof that content investments support onboarding velocity, readiness for new tools and coverage of high-demand skills. L&D teams need platforms that reduce manual tagging, simplify curation

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and provide analytics that answer real questions: Which assets correlate with improved performance? Which formats drive engagement? Which providers justify renewal? For learners, the expectation is equally clear: relevant, personalized recommendations delivered in an intuitive interface, with the option to explore beyond assigned paths when curiosity strikes.

To meet these needs, successful LCPs must combine robust content ecosystems with intelligent delivery and measurement. That begins with metadata discipline and AI-assisted tagging to ensure content is discoverable by skill, role and level. Personalization should be transparent and explainable, guiding learners toward relevant resources without creating black-box experiences. Analytics must evolve from

usage counts to actionable insights, enabling enterprises to retire underperforming assets and double down on what works. Interoperability is non-negotiable: Platforms must support SCORM, xAPI, and LTI standards, integrate cleanly with LMS and HCM systems and expose APIs for embedding content in portals and productivity tools. Skills frameworks and competency models should inform recommendations and reporting, ensuring alignment with job architectures and simplifying governance across regions. Finally, operational excellence matters—licensing visibility, renewal alerts and administrative ergonomics that reduce spreadsheet gymnastics are as critical as the learner experience itself.

The distinction between Learning Content Platforms and content marketplaces is important. Marketplaces focus on access and compatibility, offering catalogs intended to plug into an LMS or LXP without providing a native learner experience or robust analytics. LCPs, by contrast, pair the library with delivery, personalization and measurement. Many enterprises will use both, but they solve different problems: marketplaces expand choice, while LCPs make content actionable.

Looking ahead, expect pragmatic innovation. Credentialing and badging will gain traction where proof of progress matters. Video analytics will deepen insight into actual consumption behavior. Skills intelligence layers will become more precise, driving personalized delivery and

informing workforce planning. Lightweight AI "copilots" will assist with discovery and summarization, provided they operate with transparency and avoid adding complexity. Meanwhile, the ability to incorporate creator-led catalogs and niche providers will remain a differentiator for enterprises with regional or specialized needs.

For buyers, the fit profile is clear. LCPs make sense for organizations seeking measurable engagement on licensed content, not just access; enterprises executing a skills strategy without deploying a full LXP; and mid-market firms that want a centralized home for content plus platform functions. Success stories share a common pattern: curated sets mapped to roles, self-directed exploration for those who desire it and analytics that inform continuous improvement. When tagging, search, recommendations and reporting work as intended, L&D can shift from manual curation to program design and stakeholder engagement—consistent with the "do more with less" reality that has made third-party content a durable extension of the team.

Enterprises evaluating LCP providers should prioritize platforms that deliver more than catalogs. Look for solutions that combine content access with delivery, personalization and analytics; support standards and integrations for interoperability; align recommendations with skills frameworks; and provide admin tools that simplify governance and licensing. In short, choose a platform that makes content not just available, but actionable—so learning investments translate into measurable capability and business impact.

The ISG Buyers Guide™ for Learning Content Platforms evaluates software providers and products in key areas like providing access to licensed or curated learning content combined with native platform capabilities. These platforms enable organizations to not only license content from external providers but also deliver, track, personalize and optimize it through embedded learner-facing features and analytics.

This research evaluates the following software providers offering products that address key elements of learning content platforms as we define it: BizLibrary, Cornerstone, Coursera, ELB Learning, LinkedIn, Pluralsight, Skillsoft and Udemy.

# Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

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The ISG Buyers Guide™ for Learning Content Platforms is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for learning content platforms. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for learning content platforms to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of learning content platforms can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment

time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of learning content platform software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating learning content platforms and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

# Key Takeaways

Learning content platforms are evolving from static libraries into systems that deliver, personalize and measure content to drive skills and business outcomes. Success requires interoperability with LMS, HCM and collaboration tools while embedding curated, role-aware learning directly into workflows. Generative AI and skills intelligence are reshaping discovery and recommendations by automating tagging, guiding learners transparently and linking content to measurable performance. Scalable solutions combine robust ecosystems, explainable personalization and actionable analytics to reduce complexity, optimize investment and improve workforce capability.

**Software Provider Summary**

The research identifies Cornerstone, Udemy and Skillsoft as overall leaders, with Cornerstone and Udemy ranking highest across multiple categories. Classification placed Cornerstone, Skillsoft and Udemy in the Exemplary quadrant, while ELB Learning was categorized as Innovative. LinkedIn and Pluralsight were placed in the Assurance quadrant, while BizLibrary and Coursera were categorized as Merit. The research assessed providers on product and customer experience to highlight strengths and improvement.

**Product Experience Insights**

Product Experience represented 80% of the overall evaluation, weighted across capability, usability, reliability, adaptability and manageability. Udemy, Cornerstone and Skillsoft led in overall product experience. In capability, Cornerstone, Udemy and Skillsoft excelled, while Udemy, Skillsoft and Cornerstone led in reliability. Udemy, Cornerstone and ELB Learning distinguished themselves in usability, while Udemy, Cornerstone and Skillsoft led in adaptability. Skillsoft, Cornerstone and Udemy were strongest in manageability. Leaders demonstrated breadth of learning content functionality, integration of analytics and personalization, making them best suited for enterprises.

**Customer Experience Value**

Customer Experience accounted for 20% of the overall evaluation, focused on validation and TCO/ROI. Cornerstone, Udemy and LinkedIn led in customer experience by demonstrating strong commitment, proven success cases and lifecycle support. In TCO/ROI, Cornerstone, ELB Learning and Udemy performed best, showcasing clear value frameworks and alignment to enterprise goals. Providers that fell short often lacked sufficient customer references, clarity in their CX, or tools to demonstrate ROI, which may limit enterprise confidence in adoption.

**Strategic Recommendations**

Enterprises should treat learning content platforms as strategic investments that unify access with delivery, personalization and analytics. Buyers should prioritize providers that combine robust content ecosystems with strong usability, transparent AI and measurable insights. Platforms that deliver clear ROI, interoperability, and learner-friendly experiences will inspire greater confidence and adoption. Using this framework, enterprises can align providers with organizational needs, workforce readiness and long-term learning strategy.

# How To Use This Buyers Guide

## Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. <u>Define the business case and goals.</u>

   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. <u>Specify the business needs.</u>

   Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. <u>Assess the required roles and responsibilities.</u>

   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. <u>Outline the project's critical path.</u>

   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. <u>Ascertain the technology approach.</u>

   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. <u>Establish software provider evaluation criteria.</u>

   Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. <u>Evaluate and select the technology properly.</u>

   Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. <u>Establish the business initiative team to start the project.</u>

   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

# The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

## Overall Scoring of Software Providers Across Categories

The research finds Cornerstone atop the list, followed by Udemy and Skillsoft. Providers that place in the top three of a category earn the designation of Leader. Cornerstone and Udemy have done so in seven categories, Skillsoft in four, ELB Learning in two and LinkedIn in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

**Learning Content Platforms**
**Overall**

| Providers | Grade | Performance |
|---|---|---|
| Cornerstone | A- | *Leader*   85.5% |
| Udemy | A- | *Leader*   83.1% |
| Skillsoft | B+ | *Leader*   74.6% |
| LinkedIn | B- | 62.4% |
| ELB Learning | B- | 60.9% |
| Pluralsight | B- | 60.6% |
| Coursera | B- | 57.6% |
| BizLibrary | B- | 57.5% |

Source: ISG Research
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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

## Learning Content Platforms
### ISG Buyers Guide™

| ASSURANCE | EXEMPLARY |
|---|---|

Cornerstone

Udemy

LinkedIn

Pluralsight

Skillsoft

ELB Learning

Coursera

BizLibrary

| MERIT | INNOVATIVE |
|---|---|

**Customer Experience**

**Product Experience**

Source: ISG Research
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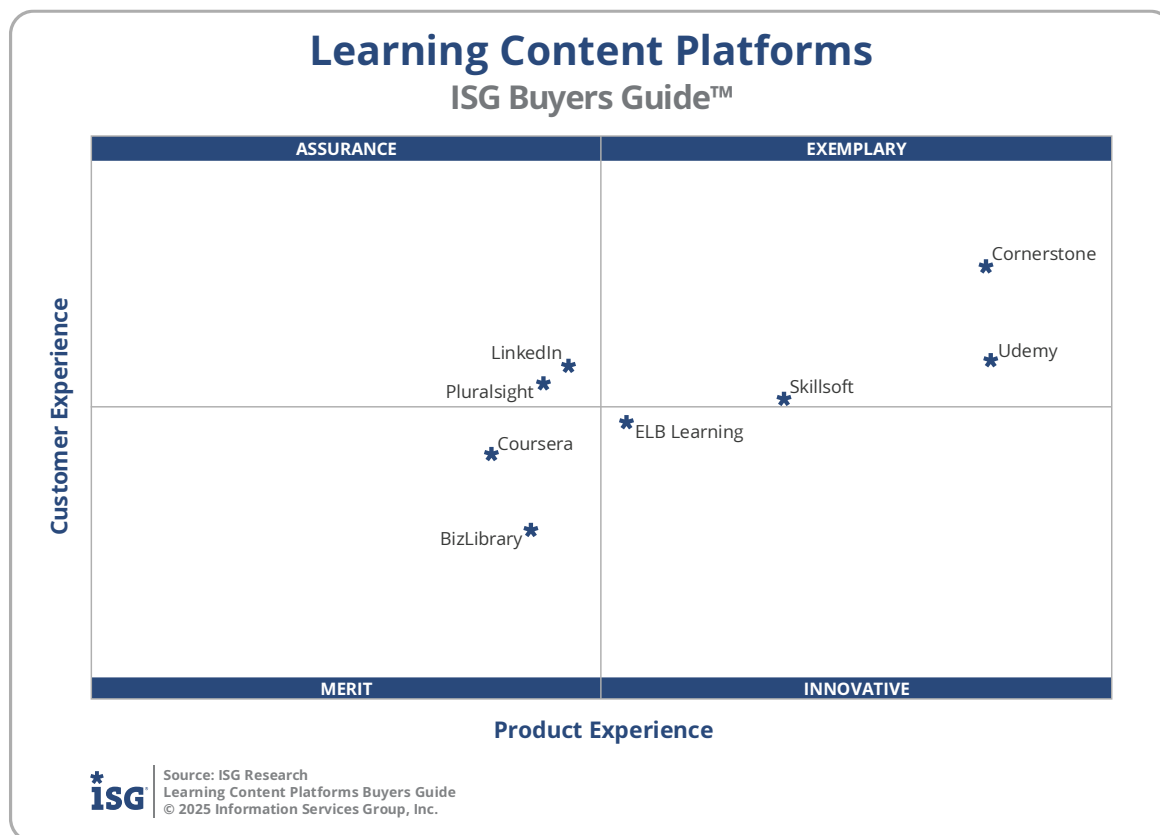
**Exemplary**: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Cornerstone, Skillsoft and Udemy.

**Innovative**: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The provider rated Innovative is: ELB Learning.

**Assurance**: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: LinkedIn and Pluralsight.

**Merit**: The categorization of software providers in Merit (lower left) represents those that did not surpass the thresholds for the Assurance, Exemplary or Innovative categories in Customer or Product Experience. The providers rated Merit are: BizLibrary and Coursera.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise

or for a specific process. Although there is a high degree of commonality in how enterprises handle learning content platforms, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.

## Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (20%), Capability (25%), Reliability (15%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Udemy, Cornerstone and Skillsoft were designated Product Experience Leaders.

### Learning Content Platforms
**Product Experience**

| Providers | Grade | Performance |
|---|---|---|
| Udemy | A- | *Leader* 67.4% |
| Cornerstone | A- | *Leader* 67.1% |
| Skillsoft | B+ | *Leader* 56.7% |
| ELB Learning | B- | 48.5% |
| LinkedIn | B- | 45.5% |
| Pluralsight | C++ | 44.1% |
| BizLibrary | C++ | 43.5% |
| Coursera | C++ | 41.5% |

Source: ISG Research
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## Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

**Learning Content Platforms**
**Customer Experience**

| Providers | Grade | Performance |
|-----------|-------|-------------|
| Cornerstone | A- | Leader 17.2% |
| Udemy | B++ | Leader 15.5% |
| LinkedIn | B++ | Leader 15.4% |
| Pluralsight | B++ | 15.1% |
| Skillsoft | B+ | 14.7% |
| ELB Learning | B+ | 14.4% |
| Coursera | B+ | 13.8% |
| BizLibrary | B- | 12.4% |

Source: ISG Research
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The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Cornerstone, Udemy and LinkedIn. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

# Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Learning Content Platforms in 2025, a software provider must be in good standing financially and ethically, have at least $15 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 50 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

Learning Content Platforms (LCP) should have provide access to licensed or curated learning content combined with native platform capabilities. These platforms enable organizations to not only license content from external providers but also deliver, track, personalize, and optimize it through embedded learner-facing features and analytics. Delivery typically occurs through the provider's own UI/UX, though LMS/LXP integrations are also supported. .

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant learning content platform products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

## Products Evaluated

| Provider | Product Names | Version | Release Month/Year |
|---|---|---|---|
| BizLibrary | BizLibrary | N/A | July 2025 |
| Cornerstone | Cornerstone Learn Content | N/A | July 2025 |
| Coursera | Coursera for Business | N/A | July 2025 |
| ELB Learning | Off-The-Shelf Courseware | N/A | July 2025 |
| LinkedIn | For Business | N/A | July 2025 |
| Pluralsight | Pluralsight Skills | N/A | July 2025 |
| Skillsoft | Skillsoft Content | N/A | July 2025 |
| Udemy | Udemy Business | N/A | July 2025 |

## Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

| Provider | Product | Revenue | Customers | Scope |
|---|---|---|---|---|
| Go1 | Go1 Marketplace | Yes | Yes | No |
| OpenSesame | OpenSesame | Yes | Yes | No |
| HSI | HSI Course Library | Yes | Yes | No |
| Kallidus | Kallidus Content | Yes | Yes | No |
| Udacity | Udacity | Yes | Yes | No |

# About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

# About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

# About ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.