Learning Management Systems Buyers Guide

Software Provider and Product Assessment



İSG Research



Learning Management Systems

Learning Management Systems (LMS) are moving from compliance workhorses to experience-driven platforms that support readiness, agility and retention. Employees expect consumer-grade usability and learning that shows up where work happens; executives expect auditable outcomes and observable impact. As the separation between LMS and learning experience platforms (LXPs) narrows, skills visibility and recommendations are becoming baseline expectations rather than add-ons. By 2027, LMS and LXP platforms with embedded

skill and job ontologies that recommend optimal learning paths will guide one-third of enterprises to elevate employee engagement and retention. This is the new bar: keep the compliance backbone intact while delivering engaging, skills-aware experiences at enterprise scale.

ISG defines Learning Management Systems as structured platforms designed to administer, deliver, track and report formal learning across an organization. They are optimized for compliance, certification and curriculum-based programs and commonly serve as the system of record for enterprise learning. In 2025, an effective LMS must also deliver a user-centric experience often associated with LXPs—personalized pathways,



relevant discovery, social elements and intuitive mobile experiences—so that learning is both auditable and engaging. Increasingly, organizations seek one platform that can support internal and external audiences (e.g., partners, contractors, customers) without losing governance, so we consider light extended-enterprise capabilities (multi-audience management, basic branding, simple commerce) in scope. We exclude tools limited to informal/discovery learning without structured administration as well as pure content libraries or standalone assessment utilities.

Enterprises today want fewer systems doing more work. That means LMS platforms must integrate cleanly with HCM/HRIS, identity management platforms, collaboration hubs, content providers and—where relevant—frontline and industry systems. The mandate is practical: reduce risk, activate skills and shorten time-to-readiness for critical roles. Learners expect an experience that feels modern and personalized; leaders expect visibility that goes beyond completions to reveal risk hotspots, skill coverage and next-best actions for managers.

The convergence of LMS and LXP is being driven as much by buyer preference as by provider roadmaps. Organizations no longer accept a bifurcated stack for structure versus experience. Instead, they want a single platform that enforces policy and auditability while enabling discovery, recommendations and light skills insight. This shift is also reshaping extended-enterprise learning: many common partner and customer education scenarios can



now run on the same stack, avoiding the "two-platform tax" while keeping data and governance coherent.

Historically, LMS deployments centered on mandatory training—policy acknowledgements, regulatory certifications, ILT/VILT scheduling and standardized curricula—with reporting designed for audits. Usability was secondary to control. As the digital workplace matured, however, demand grew for self-paced, mobile-first experiences and for learning that fits around work, not apart from it. The rise of LXPs highlighted discovery, curation and social features but often lacked the structured administration large enterprises require.

Over the last several years, these streams have converged. LMS providers incorporated LXP-like features—recommendations, playlists, simple skills tagging—while preserving assignment rules, versioning and evidence of completion. At the same time, the content ecosystem exploded, shifting L&D from pure creators to curators and elevating the importance of metadata governance, lifecycle management and deduplication. The result is a modern LMS that blends compliance rigor with approachable, skills-aware experiences.

Enterprises need audit-proof control and human-centered design in the same product. Practically, that translates to rules-based assignment (by role, risk, site, union rules), version control with history, blended instructor-led training or virtual instructor-led training and self-paced delivery, and airtight reporting—paired with intuitive interfaces, mobile access (including offline for frontline roles) and learning surfaced inside collaboration tools. They also need skills-aware pathways that reflect job requirements and proficiency, not one-size-fits-all

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To meet these needs, successful LMS platforms must strike a balance between governance and experience.

curricula. Managers need clear prompts—who's at risk, what learning closes the gap, by when—embedded in their daily views. Global organizations need strong multi-region administration, localization and accessibility. Finally, many buyers prefer a single platform that can also handle common external-audience use cases without standing up a second stack.

To meet these needs, successful LMS platforms must strike a balance between governance and experience. They require a strong compliance backbone—complete with granular roles and permissions, delegated administration, version control and defensible audit

trails—while also delivering an intuitive, consumer-grade interface that works seamlessly across devices. The experience layer must go beyond aesthetics to include personalized learning paths, relevant recommendations and social elements that enhance engagement without compromising policy logic. Skills awareness is another critical dimension: modern LMS platforms increasingly embed or integrate job and skill ontologies to inform assignments, guide learners toward proficiency and provide managers with visibility into team readiness.



Analytics must evolve from static reports to actionable insights, enabling organizations to identify compliance risks, monitor skill coverage and prompt timely interventions.

Equally important is ecosystem connectivity: integrations with HCM systems, identity platforms, content providers and collaboration tools must be reliable and low-friction, ensuring that learning appears in the flow of work while maintaining a single source of truth. Operational excellence underpins all of this—fast implementation, transparent release cycles

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and administrative ergonomics that reduce manual effort and error. Finally, artificial intelligence (AI) should serve as a practical enabler rather than a novelty, automating repetitive tasks like content tagging, assignment logic and nudging while remaining explainable and controllable. In short, the most successful LMS platforms combine compliance rigor, user-centric design and intelligent automation in a way that is trustworthy, scalable and aligned with enterprise priorities.

Within the broader Buyers Guide, the Learning Management Systems category evaluates platforms whose primary purpose is to administer, deliver, track and evidence formal learning across the enterprise—while now also delivering a baseline of experience features that buyers expect in a single platform. Our analysis emphasizes the compliance backbone plus modern experience combination, the quality of integrations and the operating model that determines

day-to-day success for L&D teams, managers and system administrators. We also consider the reality that many enterprises want to educate external audiences without parallel stacks. Accordingly, we assess whether an LMS delivers practical, "light EXE" capabilities—multi-audience administration, basic branding and simple commerce/certification—sufficient for common partner and customer scenarios while preserving governance and data coherence.

Enterprises evaluating LMS providers should prioritize platforms that prove compliance and scale operations while feeling modern and skills-aware to end users. Focus selection on auditable rules, versioning, blended delivery and evidence; integrations that make learning visible in the flow of work; analytics that move from counts to actionable risk and readiness; skills frameworks that inform assignments and guidance; and administrative ergonomics and trustworthy AI that reduce effort without sacrificing control. In short, choose the LMS that keeps you audit-ready, makes managers effective, respects learner time and is operable by the team that runs it.



ISG Buyers Guide™: Learning Management Systems

The ISG Buyers Guide™ for Learning Management Systems evaluates software providers and products in key areas relative to administration, delivery, tracking and reporting of formal learning across an enterprise. LMS are optimized for compliance, certification and curriculumbased programs and often serve as the system of record for enterprise learning. Additionally, they must possess a user-centric learning experience often associated with LXPs.

This research evaluates the following 25 software providers that offer products that address key elements of learning management systems as we define them: 360Learning, Absorb, Acorn, Adobe, Anthology, Cegid, Cornerstone, CYPHER, D2L, Dayforce, Docebo, HiBob, isolved, Learning Pool, LearnUpon, Litmos, Moodle, Oracle, PeopleFluent, Sana, SAP, Schoox, Skillsoft, Thrive and Workday.



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



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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.

The ISG Buyers Guide™ for Learning Management Systems 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 management systems. 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 management systems 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 management systems 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



ISG Buyers Guide™: Learning Management Systems

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 management system 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 management systems 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 management systems are shifting from compliance workhorses to unified platforms that combine governance, usability, skills awareness and engagement at enterprise scale. Success requires seamless integration with HCM, identity and collaboration tools while embedding learning directly into daily workflows. Generative AI and intelligent automation are reshaping operations by powering recommendations, streamlining assignments and enhancing manager visibility into readiness. Scalable solutions deliver audit-ready compliance, personalized learning paths and actionable analytics to reduce administrative burden.

Software Provider Summary

The research identifies Oracle, Cornerstone and Schoox as overall leaders, with Oracle ranking highest across multiple categories. Classification placed Cornerstone, Dayforce, Docebo, HiBob, LearnUpon, Oracle, SAP, Schoox, Skillsoft and Workday in the Exemplary quadrant, while Anthology, CYPHER, isolved, Learning Pool and Moodle were categorized as Innovative. Absorb and D2L were placed in the Assurance quadrant, while 360Learning, Acorn, Adobe, Cegid, Litmos, PeopleFluent, Sana and Thrive were categorized as Merit. The research assessed providers on product and customer experience to their strengths and improvement.

Product Experience Insights

Product Experience represented 80% of the overall evaluation, weighted across capability, usability, reliability, adaptability and manageability. Oracle, Schoox and Cornerstone led in overall product experience. In capability, Cornerstone, Schoox and Oracle excelled, while Oracle, SAP and Schoox led in reliability. Oracle, Dayforce and SAP distinguished themselves in usability, while Oracle, LearnUpon and SAP led in adaptability. Oracle, LearnUpon and Schoox were strongest in manageability. Leaders demonstrated breadth of LMS functionality, integration of experience-forward features, making them best suited for enterprises.

Customer Experience Value

Customer Experience accounted for 20% of the overall evaluation, focused on validation and TCO/ROI. Oracle, Cornerstone and Docebo led in customer experience by demonstrating strong commitment, proven success cases and lifecycle support. In TCO/ROI, Docebo, Oracle and Cornerstone 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 LMS platforms as strategic investments that unify compliance with engaging, skills-aware experiences. Buyers should prioritize providers that combine a strong compliance backbone with consumer-grade usability, transparent AI and analytics that drive readiness. Platforms that deliver measurable ROI, audit-ready governance, and manager- and learner-friendly workflows will inspire greater confidence and adoption. Using this framework, enterprises can align providers with organizational needs, workforce agility and long-term talent development priorities.



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. Specify the business needs.

Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.

3. Assess the required roles and responsibilities.

Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.

4. Outline the project's critical path.

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. Ascertain the technology approach.

Determine the business and technology approach that most closely aligns to your enterprise's requirements.

6. Establish software provider evaluation criteria.

Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.

7. Evaluate and select the technology properly.

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. Establish the business initiative team to start the project.

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 Oracle atop the list, followed by Cornerstone and Schoox. Providers that place in the top three of a category earn the designation of Leader. Oracle has done so in seven categories; Cornerstone, SAP and Schoox in three; Docebo and LearnUpon in two; and Dayforce in one.

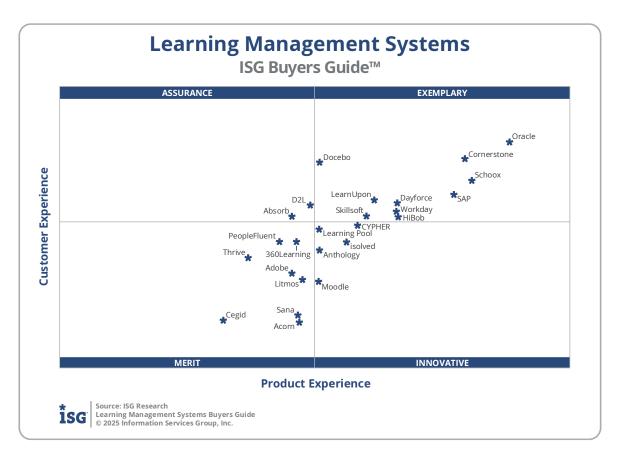
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted 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.

The research places software providers into one of four overall categories: Assurance, Exemplary,

Learning Mgmt. Systems Overall Providers Grade Performance Oracle Leader 89.6% Cornerstone A-Leader 85.5% A-Schoox 84.9% SAP B++ Skillsoft B+ Workday B+ LearnUpon B+ HiBob B+ B+ Dayforce **CYPHER** B+ Docebo В В isolved D2L В Learning Pool В В 360Learning R Absorb Anthology B-B-Moodle Litmos B-B-PeopleFluent B-Acorn B-Adobe B-B-Cegid C+ Source: ISG Research Learning Management Systems Buyers Guide © 2025 Information Services Group, Inc.

Merit or Innovative. This representation classifies providers' overall weighted performance.





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, Dayforce, Docebo, HiBob, LearnUpon, Oracle, SAP, Schoox, Skillsoft and Workday.

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 providers rated Innovative are: Anthology, CYPHER, isolved, Learning Pool and Moodle.

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: Absorb and D2L.

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: 360Learning, Acorn, Adobe, Cegid, Litmos, PeopleFluent, Sana and Thrive.



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 management systems, 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. Oracle, Schoox and Cornerstone were designated Product Experience Leaders.

Learning Mgmt. Systems

Product Experience

Providers	Grade	Performance	
Oracle	А	Leader	72.2%
Schoox	A-	Leader	67.9%
Cornerstone	A-	Leader	67.1%
SAP	A-		65.9%
HiBob	B+		59.6%
Dayforce	B+		59.5%
Workday	B+		59.4%
LearnUpon	B+		56.8%
Skillsoft	B+		56.0%
CYPHER	В		54.0%
isolved	В		52.8%
Docebo	В		50.5%
Learning Pool	В		50.4%
Anthology	В		50.4%
Moodle	В		50.3%
D2L	B-		49.8%
Litmos	B-		48.7%
Acorn	B-		48.3%
Sana	B-		48.2%
360Learning	B-		48.0%
Absorb	B-		47.5%
Adobe	B-		47.5%
PeopleFluent	B-		46.1%
Thrive	C++	4	12.6%
Cegid	C+	_39	9.7%

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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.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Oracle, Cornerstone and Docebo. These category Leaders best communicate commitment and dedication to customer needs.

Providers	Grade	Performance		
Oracle	А	Leader	17.8%	
Cornerstone	A-	Leader	17.2%	
Docebo	A-	Leader	17.1%	
Schoox	A-		16.3%	
SAP	B++		15.6%	
LearnUpon	B++		15.4%	
Dayforce	B++		15.3%	
D2L	B++		15.2%	
Workday	B+		14.8%	
Skillsoft	B+		14.7%	
Absorb	B+		14.7%	
HiBob	B+		14.7%	
CYPHER	B+		14.4%	
Learning Pool	B+		14.3%	
isolved	B+		13.9%	
PeopleFluent	B+		13.9%	
360Learning	B+		13.9%	
Anthology	В		13.3%	
Thrive	В	,	13.2%	
Adobe	B-	12	2.4%	
Litmos	B-	12	.1%	
Moodle	B-	12	.1%	
Sana	C++	10.49	%	
Acorn	C++	10.29	/ 6	
Cegid	C+	9.8%	6	

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 Management Systems in 2025, a software provider must be in good standing financially and ethically, have at least \$15 million 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 last 12 months.

Learning Management Systems (LMS) should have structured platforms designed to administer, deliver, track, and report formal learning across an organization. They are optimized for compliance, certification, and curriculum-based programs and often serve as the system of record for enterprise learning. Additionally, they must possess a user-centric learning experience often associated with learning experience platforms (LXP).

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 management system 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
360Learning	360Learning	121	June 2025
Absorb	AbsorbLMS	5.123.0	June 2025
Acorn	Acorn PLMS	1.6.7	June 2025
Adobe	Adobe Learning Manager	N/A	July 2025
Anthology	Blackboard	3900.121.0	June 2025
Cegid	Cegid Learning	1.4	May 2025
Cornerstone	Cornerstone Learn	N/A	July 2025
CYPHER	Cypher Learning Platform	N/A	July 2025
D2L	Brightspace	20.25.07	July 2025
Dayforce	Dayforce Learning	N/A	July 2025
Docebo	Docebo	N/A	July 2025
HiBob	HiBob Learning	N/A	July 2025
isolved	isolved Learn & Grow	11.7	June 2025
Learning Pool	Learning Pool	N/A	July 2025
LearnUpon	LearnUpon LMS	N/A	July 2025
Litmos	Litmos	N/A	July 2025
Moodle	Moodle Workplace	5.3	April 2025
Oracle	Oracle Learning	25C	June 2025
PeopleFluent	Learning	25.02.2	April 2025



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Sana	Sana Learn	N/A	July 2025
SAP	SAP SuccessFactors Learning	1H 2025	May 2025
Schoox	Schoox	N/A	July 2025
Skillsoft	Skillsoft Percipio	N/A	July 2025
Thrive	Thrive Platform	N/A	July 2025
Workday	Learning Management	2025 Spring release	March 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
ADP	ADP Learning	Yes	Yes	No
BizLibrary	BizLMS	Yes	Yes	No
echo360	echo360	Yes	Yes	No
ELB Learning	Rockstar LMS	Yes	Yes	No
Infor	Infor LMS	Yes	Yes	No
Kallidus	Learn LMS	Yes	Yes	No
Paycom	Paycom Learning	Yes	Yes	No
Paycor	Paycor Learning Management	Yes	Yes	No
Paylocity	Paylocity LMS	Yes	Yes	No
TalentLMS	TalentLMS	Yes	Yes	No
SkyPrep	SkyPrep LMS	Yes	Yes	No
UKG	UKG Pro Learning	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.

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