Learning and Development Suites Buyers Guide

Software Provider and Product Assessment

EXECUTIVE SUMMARY

iSG Research

Learning and Development Suites

Learning and Development (L&D) Suites are emerging as the connective tissue of talent enablement, bringing together formal learning, experience-led engagement, skills intelligence and performance into one coherent system that leaders can actually run. Buyers are moving away from fragmented stacks and toward unified platforms that reduce swivel-chair work for employees and administrators while making it easier to prove impact. The expectation is no longer that learning sits apart from work or from performance decisions; it must inform them.

By 2028, two-thirds of enterprises will require that learning is experienced through Generative AI (GenAI) that can provide intelligent guidance on the skills that should be improved for a worker to be effective. In practice, that means L&D Suites are being judged by how well they embed intelligent guidance into everyday workflows, not just by the size of their feature lists.

ISG defines Learning and Development Suites as unified platforms that combine core LMS functionality with experience-forward capabilities, skills intelligence and content access—often enhanced by native or embedded AI. These suites integrate performance management and skills development with learning experiences to create a deep, working connection between development and outcomes. The scope spans the full spectrum of enterprise learning needs, from compliance and certifications to skills-based development and continuous learning. We include platforms that deliver this integration through a shared data model, consistent user experience, and measurable ties between learning, skills and performance decisions. We exclude single-function LMS products, content libraries without platform capabilities and performance tools that lack a substantive, native learning layer or a shared skills foundation.

Learning
Market Assertion

By 2028, two-thirds of enterprises will require that learning is experienced through GenAI that can provide intelligent guidance on the skills that should be improved for a worker to be effective.

Matthew Brown
Director of Research, Human Capital Management

ISG Research

For enterprises, the appeal is straightforward: fewer systems doing more work with clearer lines of sight from learning investment to business capability. CFOs and CIOs want consolidation without losing control; CHROs want a skills strategy that shows up in the tools people actually use; L&D leaders want to spend less time stitching together data and more time designing programs that move the needle. Suites promise a coherent experience where required training, role-based upskilling, coaching prompts and performance check-ins live in the same place—and where the system can explain why it is recommending a path, not just that it is.

Historically, organizations assembled learning from separate components: the LMS for structure and compliance, an LXP for discovery and engagement and a performance system for goals, check-ins and reviews. Data and workflows rarely lined up, leaving teams to

reconcile completions, feedback and skill signals after the fact. The first wave of "suites" often meant a bundle rather than a true integration. In the last two years, however, the category has matured toward shared skills graphs and ontologies, a unified user experience and workflows that carry a learner from assignment to practice to feedback to performance conversations without dropping context. The suite is evolving from a convenient license to an operating model.

Enterprises need this coherence to solve practical problems. Think audit-ready compliance that can coexist with personalized, in-the-flow experiences; role- and skill-aware paths that reflect job architecture and proficiency, not one-size-fits-all curricula; and managers to see "who needs what by when" at a glance, with nudges that fit into daily routines. Global organizations also need robust delegation, localization and accessibility, plus the ability to serve external audiences when partner or customer enablement is part of the mandate. Above all, leaders want to connect learning to work—readiness for key roles, time-to-productivity in onboarding, adoption of new tools—and to measure progress credibly.

To meet these needs, successful L&D suites combine a compliance backbone, an experience layer and a unified intelligence layer. The compliance backbone ensures rules-based assignment, versioning and blended delivery (ILT/VILT and asynchronous) with evidence an auditor can trust. The experience layer brings consumer-grade usability, mobile access and learning that appears inside collaboration hubs and frontline systems so employees do not have to go hunting for it. The intelligence layer ties everything together through a shared skills model and governed AI that can personalize recommendations, summarize content, draft goals or learning plans and orchestrate follow-ups—always with explainable logic and clear administrative controls. Analytics evolve from static counts to risk and readiness views, correlating learning, skill signals and performance outcomes so leaders can prune what underperforms and amplify what works.

> **The day-to-day realities for L&D teams, managers and administrators define whether a suite succeeds.**

The day-to-day realities for L&D teams, managers and administrators define whether a suite succeeds. L&D needs curation and authoring aids that reduce toil— AI-assisted tagging, translation and item generation— without turning the design process into a black box. Managers need timely prompts inside their existing tools, not new portals to check; they should be able to launch a coaching moment from a performance check-in and assign a short learning path without losing track of accountability. System administrators need reliable integrations with HCM/HRIS, identity and content providers; robust role-based access; and sandboxing so they can adopt new capabilities without breaking production. When suites respect these operating realities, adoption follows.

Innovation cycles in this category are practical and accelerating. Skills intelligence is becoming more precise, allowing suites to map job requirements to observable behaviors and relevant

learning, not just to keywords. Agentic assistants are emerging to orchestrate workflows—drafting learning plans from goals, scheduling check-ins and reminding teams ahead of compliance deadlines—while remaining governed by enterprise policies. Simulations and mixed-reality scenarios are expanding beyond niche pilots to support onboarding and safety-critical roles. Most importantly, analytics are shifting from descriptive to prescriptive and explanatory, helping leaders understand not only what happened but what to do next and why.

The risks are equally real. Without a clear skills architecture and content governance, personalization can amplify noise instead of value. If AI logic is opaque, trust erodes and adoption stalls. If performance and learning data models aren't unified, managers get conflicting views and administrators end up back in spreadsheets. Global deployments can stumble on localization, accessibility and regulatory nuances. The antidote is disciplined data stewardship, transparent recommendation logic and a change-management plan that equips managers and employees to use new capabilities with confidence.

Within the Buyers Guide, the L&D suites are judged on how convincingly they unify these threads—compliance, experience, skills and performance—through a shared architecture and workflow. We look for proof that the suite operates as one system: a common skills model, consistent UX, native ties between learning and performance, trustworthy AI and measurable impact on readiness and outcomes. We do not consider bundles without meaningful integration or performance tools that merely link out to learning.

As you evaluate providers, prioritize suites that can explain their recommendations, demonstrate a shared data and skills model and show working integrations with your HCM core, identity and collaboration stack. Seek evidence that compliance and experience can coexist without administrative contortions, that analytics illuminate risk and readiness rather than just usage and that managers are empowered to act in the flow of work. In short, choose the platform that keeps you audit-ready, connects learning to performance decisions and gives your teams an intelligent assistant—not another system to manage.

The ISG Buyers Guide™ for Learning and Development Suites evaluates software providers and products in key areas: unified platforms that combine core LMS functionality with experience-forward capabilities, skills intelligence and content access—often enhanced by native or embedded AI. Additionally, these suites integrate the functions of performance management and skills development with learning experiences, creating a deep and meaningful connection between learning and development. These suites aim to support the full spectrum of enterprise learning needs, from compliance to skills-based development and continuous learning.

This research evaluates the following 9 software providers offering products to address key elements of learning and development suites as we define it: Acorn, Cegid, Cornerstone, Dayforce, Oracle, PeopleFluent, SAP, Schoox 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 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 and Development Suites 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 and development suites. 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 and development suites 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 and development suite technology 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 and development suites. 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 and development suites 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 and development suites are evolving into unified platforms that blend compliance, engagement, skills intelligence and performance into one system. Success requires seamless integration with HCM, identity and collaboration tools while embedding learning directly into daily workflows. Generative AI and intelligent assistants are reshaping experiences by personalizing recommendations, automating curation and linking development to performance outcomes. Scalable solutions offer audit-ready compliance, role-based upskilling and actionable analytics that improve readiness and 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, Oracle, SAP and Schoox in the Exemplary quadrant, while Workday was categorized as Innovative. Acorn, Cegid and PeopleFluent were placed in the Merit quadrant. The research assessed providers on the balance of 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. Oracle, Schoox and Cornerstone led in overall product experience. In capability, Cornerstone, Oracle and Schoox excelled, while Oracle, SAP and Schoox led in reliability. Oracle, Dayforce and SAP distinguished themselves in usability, while Oracle, SAP and Schoox led in adaptability. Oracle, Schoox and Workday were strongest in manageability. Leaders demonstrated breadth of LMS functionality, integration of skills intelligence and performance, scalability and adaptability, making them best suited for enterprises seeking unified, enterprise-grade L&D suites.

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

Strategic Recommendations
Enterprises should treat L&D suites as strategic platforms that unify compliance, skills and performance while embedding learning into the flow of work. Buyers should prioritize providers that demonstrate a shared data and skills model, transparent AI and strong ties between learning and outcomes. Platforms that deliver measurable ROI, audit-ready compliance, and manager- and employee-friendly experiences will inspire greater confidence and long-term adoption. Using this framework, enterprises can align providers with organizational needs, workforce readiness and strategic talent 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. Define the business case and goals.

    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, Schoox in six, Cornerstone and SAP in three and Dayforce and Workday 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 and Dev. Suites
Overall

Providers	Grade	Performance
Oracle	A	Leader 90.0%
Cornerstone	A-	Leader 85.4%
Schoox	A-	Leader 84.7%
SAP	B++	80.7%
Workday	B+	73.0%
Dayforce	B+	71.2%
PeopleFluent	B-	59.6%
Acorn	B-	58.8%
Cegid	C+	48.3%

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.

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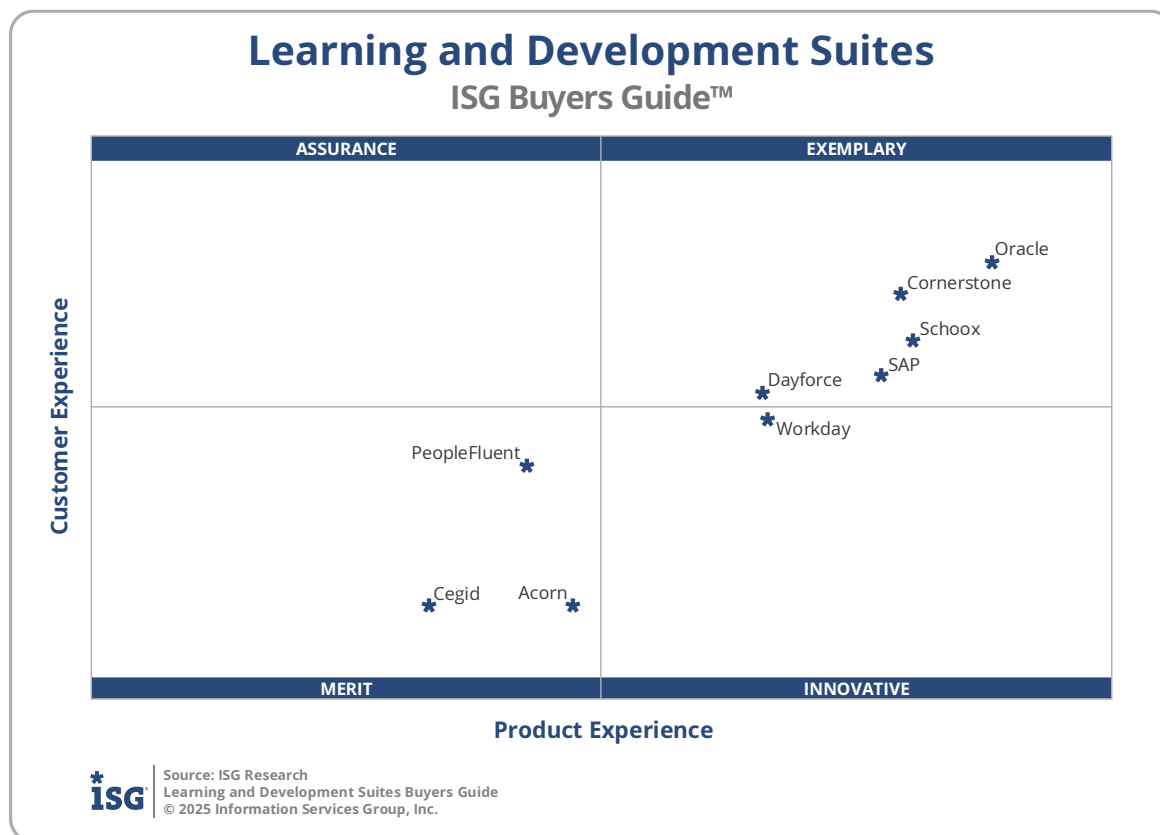
Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Cornerstone, Dayforce, Oracle, SAP and Schoox.

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: Workday.

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.

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: Acorn, Cegid and PeopleFluent.

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 and development suites, 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 and Dev. Suites
Product Experience

Providers	Grade	Performance
Oracle	A	Leader 72.5%
Schoox	A-	Leader 67.8%
Cornerstone	A-	Leader 67.1%
SAP	A-	65.9%
Workday	B+	59.2%
Dayforce	B+	59.0%
Acorn	B-	47.8%
PeopleFluent	B-	45.1%
Cegid	C+	39.4%

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 and Dev. Suites
Customer Experience

Providers	Grade	Performance
Oracle	A	Leader 17.8%
Cornerstone	A-	Leader 17.2%
Schoox	A-	Leader 16.3%
SAP	B++	15.6%
Dayforce	B++	15.3%
Workday	B+	14.8%
PeopleFluent	B+	13.9%
Acorn	C++	10.2%
Cegid	C+	9.8%

Source: ISG Research
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The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Oracle, Cornerstone and Schoox. 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 and Development Suites 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 & Development Suites should provide unified platform that combine core LMS functionality with experience-forward capabilities, skills intelligence, and content access—often enhanced by native or embedded AI. Additionally, these suites integrate the functions of performance management and skills development with learning experiences, creating a deep and meaningful connection between learning and development. These suites aim to support the full spectrum of enterprise learning needs, from compliance to skills-based development and continuous learning.

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 and development suites 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
Acorn	Acorn PLMS	1.6.7	June 2025
Cegid	Cegid Learning	1.4	May 2025
Cornerstone	Cornerstone Galaxy	N/A	July 2025
Dayforce	dayforce Learning	N/A	July 2025
Oracle	Oracle Learning	25C	July 2025
PeopleFluent	Learning	25.02.2	April 2025
SAP	SAP SuccessFactors Learning	1H 2025	May 2025
Schoox	Schoox	N/A	July 2025
Workday	Workday Learning	2025 Spring	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
360Learning	360Learning	Yes	Yes	No
Absorb	Absorb LMS	Yes	Yes	No
Docebo	Docebo	Yes	Yes	No
echo360	echo360	Yes	Yes	No
HiBob	HiBob Learning	Yes	Yes	No
Infor	Infor LMS	Yes	Yes	No
isolved	isolved Learn and Grow	Yes	Yes	No
Learning Pool	Learning Pool	Yes	Yes	No
LearnUpon	LearnUpon	Yes	Yes	No
Skillsoft	Skillsoft Precipio	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.

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.