

Extended Enterprise Learning Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY



VENTANA
RESEARCH

NOW
PART
OF





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The information contained in this Ventana Research Buyers Guide provides a baseline of knowledge that enterprises can use to evaluate the sophistication of software providers and products in the area of extended enterprise learning. Our findings are drawn from thorough, research-based analysis of product and customer experience categories that best represent how an enterprise should evaluate software providers.

Nothing in this report or our research is intended to imply that one software provider or product is the right choice for any one particular enterprise. Rather, our goal is to provide an objective rating of software providers and products related to the topic of this Buyers Guide using our research methodology and blueprint for successful evaluation and selection. We performed this research independent of any external influence, charged no fees for any software provider to participate in the research and invited all relevant providers that met our inclusion criteria. This report includes products generally available as of June 1, 2024.

The complete Buyers Guide report and research is available to be licensed for use across an enterprise or the internet. We provide insights on the technology industry, software categories and providers related to this Buyers Guide to enterprises through our Ventana On-Demand research and advisory service. We also offer assessment services using this research to help discover and provide guidance on software provider selection.

We certify that Ventana Research performed this research to the best of our ability, that the analysis is a faithful representation of our knowledge of software providers and products, and that the ratings are our own.

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Extended Enterprise Learning

Over the last several years, the learning technology industry has experienced a remarkable evolution, gaining speed because of employer expectations, worker demands and an elevated focus being placed on ongoing development. As organizations recognize the critical role of continuous learning in driving productivity and employee engagement, the market has responded with a diverse array of solutions. To fully support the demands of employee, customer and partner learning and development needs, multiple solutions are often needed. The software available to businesses to support learning and development strategies have multiplied exponentially. From Learning Management Systems (LMS) to Learning Experience Platforms (LXP), from Learning Content Providers (LCP) and Extended Enterprise (EXE) learning technology, the options are numerous and can be overwhelming.

Extended Enterprise (EXE) learning solutions extend the reach of traditional learning platforms beyond an organization's internal boundaries to include external stakeholders such as customers, partners, suppliers, franchisees and distributors. The EXE solutions are designed to support the unique learning needs of diverse audiences connected to an organization's ecosystem. EXE solutions typically offer customizable training programs tailored to the specific needs and objectives of each external group, enabling organizations to enhance relationships, improve performance and consistency, and drive business growth across their extended external network. By providing access to relevant learning resources, certifications and knowledge-sharing tools, EXE solutions foster a sense of community, collaboration, loyalty and expertise among external stakeholders, ultimately contributing to the overall success of the organization.



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Learners today are no longer satisfied with static content or one-size-fits-all approaches. They seek personalized experiences similar to their interactions with technology in their personal life like those with streaming services or social media platforms. Whether it is Gen Z digital natives or digital immigrants made up of prior generations, learners want flexibility, relevance and engaging content. The traditional LMS no longer suffices as a singular learning software component. Learners desire a more intuitive and dynamic learning environment designed to create personalized experiences at scale. Learning paths must adapt to individual preferences, allowing learners to explore topics of interest. The LMS is a critical resource for any organization concerned with productivity,

organizational agility and operational excellence. These technologies enable organizations to demonstrate an investment in people, as the LMS not only facilitates regulatory and legal compliance and other forms of cost and risk avoidance but also improves internal mobility,



career growth and the employee experience, leading to improved productivity, engagement and retention.

As learner expectations and demands change, so must the supporting software. Imagine an LMS that knows your learning style—like a friendly guide who tailors the journey just for you. It recommends relevant courses, tracks progress and nudges you when it is time to level up. And when you are curious about a new skill, it opens a hidden door to a treasure trove of microlearning modules. Learners today want this magical blend of personalization and convenience.

Organizations have shifted their perspective on learning. It is no longer seen as a cost center, but as a driver of business success. CEOs are now measuring the return on investment (ROI) in terms of employee engagement, productivity and retention. LXPs have gained prominence



Extended enterprise learning solutions act as bridges, connecting organizations more closely with their partners, customers and contractors.

since they prioritize the learner experience, curating content and fostering social learning. These platforms are masters at making learners feel seen, creating personalized playlists for each learner. They recommend articles, videos and podcasts, ensuring that learning feels less like a chore and more like a delightful exploration. This category focuses on delivering personalized, learner-driven and immersive learning experiences to keep the workforce engaged and productive. This represents a major attitudinal shift in the enterprise learning domain, away from what the organization requires of the individual and toward a more mutually beneficial arrangement that reflects the interests of both the employer and the employee, as well as what each expects from the other.

But it is not just about internal employees anymore. The extended enterprise learning market has experienced somewhat of a renaissance. Extended enterprise learning solutions act as bridges, connecting organizations more closely with their partners, customers and contractors. They allow customization for different audiences—channel partners learn about the latest widgets, franchisees master secret sauce recipes and contractors quickly align to new safety protocols. The path to value lies in consistent training across the entire ecosystem.

The role of the learning and development teams has also evolved as the technology advances and more options are available. Due to the continued expansion of the learning content market, learning teams can deliver more high-quality content for ongoing employee development through the use of 3rd party content libraries. This shift enables teams to comply with the legacy approach of “do more with less” that often befalls the learning function. Numerous content providers and content aggregators have solidified their position as the extension of the learning teams, which makes it more possible for learning to find its



new place as a strategic partner with the business, not just the training creation and delivery engine.

Artificial Intelligence (AI) has transformed the learning landscape even further. AI-powered LXPs recommend personalized content, adapt difficulty levels and provide instant answers through chatbots. Predictive analytics help identify high-potential learners and tailor



AI is not just about efficiency; it is about creating engaging and enriching learning experiences.

interventions. AI is not just about efficiency; it is about creating engaging and enriching learning experiences. As organizations adapt to remote work, hybrid models and gig economy dynamics, AI remains a strategic ally. AI has changed the discussion around employee learning and development. It is not just about ticking boxes; it is about empowering individuals to thrive in an evolving world.

As in years past, the LMS still provides easy access to a wide selection of job skill training programs, certifications, and compliance-related written content and assessment. Beyond compliance, many

organizations have placed new emphasis on learning, based on a combination of business requirements and workers' desired career paths, focusing on identifying and closing skills gaps required for career development in alignment with future business needs. Many organizations have abandoned traditional, classroom-style learning in favor of asynchronous, self-paced e-learning. In addition, organizations are increasingly emphasizing learning the way it is actually achieved within business enterprises—informally, socially and within the flow of work. To engage learners more effectively and ensure they retain new information, organizations are embedding social collaboration, knowledge sharing and gamification directly within the tools workers already access regularly, so that learning becomes a cultural norm rather than a separate destination.

Technology providers have made significant advances in how organizations create, curate and deliver content, and AI/ML capabilities have revolutionized how and where content is recommended to the learners consuming it. As a result, organizations can optimize learning outcomes, tie those outcomes to productivity and maximize ROI.

We believe that over the next few years, as capabilities like AI-supported learning coaches, adaptive recommendation engines and embedded social collaboration tools become a requirement, vendors will invest in a variety of product capability advances. These include more user-friendly authoring tools so organizations can create new learning assets from existing ones, as well as adaptive learning. In this learning model, the platform gauges a learner's mastery of the subject and adapts learning delivery to more efficiently help the learner achieve proficiency or a personal goal. Finally, we expect to see more simulations and other instruments that provide evidence of competency and understanding.



Our continuous research and analysis of the market for business applications and technologies guide our comprehensive approach to this Value Index. For two decades, Ventana Research has conducted market research in learning management as well as HCM disciplines including candidate engagement, continuous payroll, the employee experience, total compensation management and workforce management.

This Extended Enterprise Learning Buyers Guide evaluates products based on authoring and curation, content management external learning administration, industry standards,



The technology to support the needs of these external populations has continued to innovate and offer new options for businesses to consider.

integration methods, integration with enterprise platforms/tools, investment, learner-related capabilities, learning administrator capabilities, learning platform capabilities, manager-related reporting capabilities, mobile support, personalization and the EX, product value areas, skills, social collaboration, types of learning supported and user roles and personas.

Traditional learning needs at organizations have gone beyond the employees, and have continued expanding to include partners, customers, resellers, and other components of the extended business population. The technology to support the needs of these external populations has continued to innovate and offer new options for businesses to consider. In addition to standalone Extended Enterprise Learning platform

providers, the LMS market has expanded to afford businesses the luxury of supporting internal and external audiences in the same platform, with varying degrees of features and functionality. While some of the providers in this Buyers Guide offer multiple learning solutions, the evaluation was focused on what is available to support the needs of external learners to the organization.

This research evaluates the following software providers offering products that address key elements of extended enterprise learning as we define it: 360Learning, Cornerstone, D2L, LearnUpon, Oracle, SAP, Schoox, TalentLMS and Thought Industries.



Buyers Guide Overview

For over two decades, Ventana 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.

This Ventana Research Buyers Guide: Extended Enterprise Learning 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 extended enterprise learning software. 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, Ventana 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 Ventana Research Value Index methodology and blueprint, which links the personas and processes for extended enterprise learning 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 extended enterprise learning 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.

Ventana Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of extended enterprise learning 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 extended enterprise learning systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



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. Companies that place in the top three of a category earn the designation of Leader. Cornerstone has done so in six of the seven categories; Oracle in five; SAP and Thought Industries in three; and LearnUpon and Schoox in two.

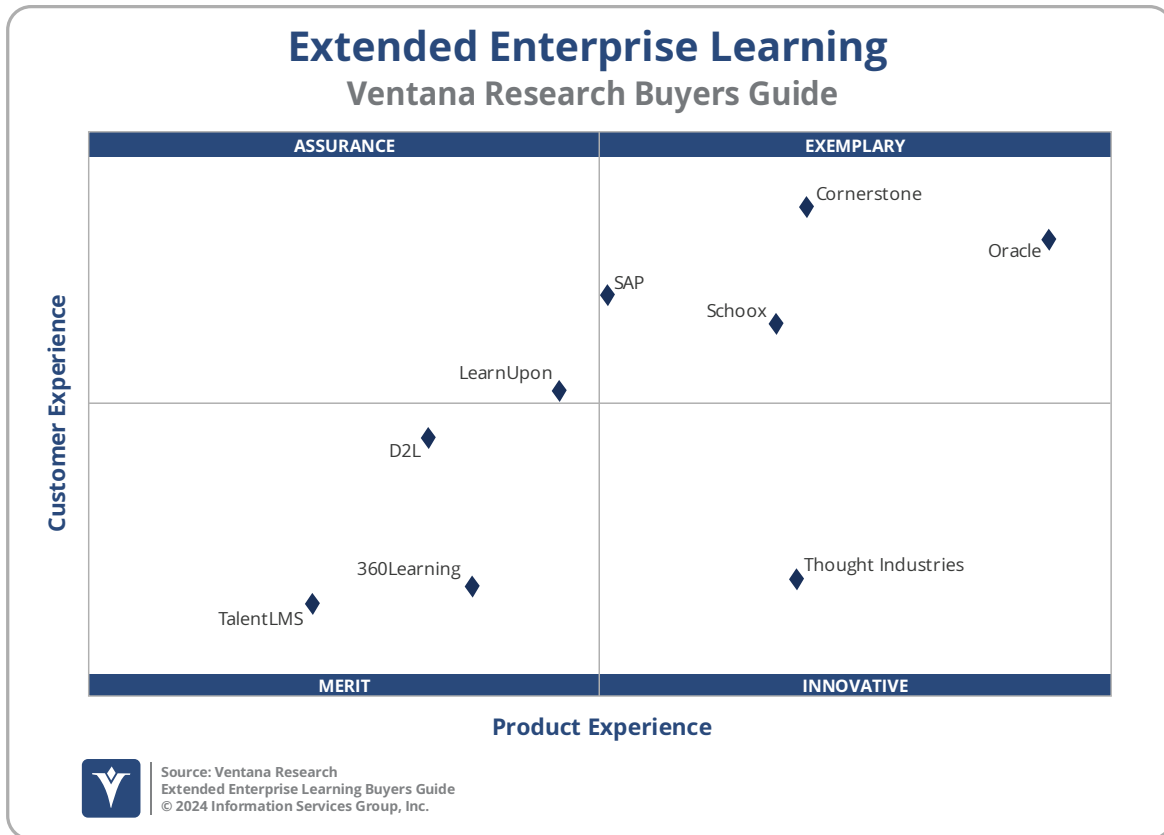
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance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

Extended Enterprise Learning
Overall

Providers	Grade	Performance
Oracle	A-	Leader 84.8%
Cornerstone	B++	Leader 80.7%
Schoox	B++	Leader 78.7%
Thought Industries	B++	77.0%
SAP	B+	73.9%
LearnUpon	B+	71.8%
360Learning	B+	69.0%
D2L	B	68.4%
TalentLMS	B	63.4%

Source: Ventana 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, 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 level of requirements in Customer Experience. The provider rated Innovative is: Thought Industries.

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 provider rated Assurance is: LearnUpon.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: 360Learning, D2L and TalentLMS.

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 extended enterprise learning, 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 life cycle 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: Adaptability (10%) Capability (40%), Manageability (10%), Reliability (10%) and Usability (10%). This weighting impacted the resulting overall ratings in this research. Oracle, Cornerstone and Thought Industries were designated Product Experience Leaders. While not a Leader Thought Industries was also found to meet a broad range of enterprise product experience requirements.

Extended Enterprise Learning
Product Experience

Providers	Grade	Performance
Oracle	A-	Leader 67.7%
Cornerstone	B++	Leader 62.0%
Thought Industries	B++	Leader 61.7%
Schoox	B++	61.2%
SAP	B+	56.3%
LearnUpon	B+	55.6%
360Learning	B+	54.0%
D2L	B	53.0%
TalentLMS	B	50.3%

Source: Ventana Research
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Many enterprises will only evaluate capabilities for workers in IT or administration, but the research identified the criticality of Capability (40% weighting) across a broader set of usage personas that should participate in extended enterprise learning.




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 life cycle 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.

Providers	Grade	Performance
Cornerstone	A	Leader 18.3%
Oracle	A	Leader 17.9%
SAP	A-	Leader 17.2%
Schoox	A-	16.7%
LearnUpon	B++	15.4%
D2L	B++	15.1%
Thought Industries	B	13.3%
360Learning	B	13.2%
TalentLMS	B	13.0%

 Source: Ventana Research
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The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Cornerstone, Oracle and SAP. These category leaders best communicate commitment and dedication to customer needs. While not a Leader, Schoox was also found to meet a broad range of enterprise customer experience requirements.

Many software providers we evaluated have sufficient information available through the website and presentations. While many have customer case studies to promote success, a few lack depth in articulating the commitment to customer experience and an organization’s extended enterprise learning journey. As the commitment to a software provider is a continuous investment, the importance of supporting customer experience in a holistic evaluation should be included and not underestimated.



Appendix: Software Provider Inclusion

For inclusion in the Ventana Research Extended Enterprise Learning Buyers Guide for 2024, a software provider must be in good standing financially and ethically, have at least \$25 million in annual or projected revenue verified using independent sources, sell extended enterprise learning software and have at least 100 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 18 months. A software provider must have a product that provides learning-specific, manager- and employee-specific, manager, analyst and administrative, analytics and planning capabilities in standalone form or as part of a suite of applications.

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. We have adopted this approach because we view it as our responsibility to assess all relevant providers, whether or not they choose to participate.

All software providers that offer relevant extended enterprise learning 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	V104	May 2024
Cornerstone	Cornerstone Learning Management	SaaS	May 2024
D2L	D2L Brightspace	V20.24.5	May 2024
LearnUpon	LearnUpon	SaaS	May 2024
Oracle	Oracle Learning	V 24B	April 2024
SAP	SAP SuccessFactors Learning	H12024	April 2024
Schoox	Schoox	SaaS	May 2024
TalentLMS	TalentLMS	SaaS	May 2024
Thought Industries	TI Enterprise Learning Cloud	SaaS	May 2024



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 >\$25M	>100 Customers
Zensai	Zensai (formerly LMS365)	No	Yes
WorkRamp	WorkRamp Customer LMS	No	Yes
Skilljar	Skilljar External LMS	No	Yes
Northpass	Northpass	Yes	No



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Ventana Research, now part of Information Services Group, provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through the Ventana Research community, and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premiere service, Ventana On-Demand (VOD), provides structured education and advisory support with subject-matter expertise and experience in the software industry. Ventana Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored Assessment Services and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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