

Learning Management Systems Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY





Bend, Oregon

June 2024

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 learning management systems. 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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Learning Management Systems

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.

Ventana Research defines Learning Management Systems (LMS) as a category of software designed to facilitate the administration, documentation, tracking and delivery of employee development content or training programs. The LMS serves as a centralized platform where organizations can manage various aspects of their learning initiatives, including course creation, enrollment, progress tracking and assessment. LMSs provide a structured and often prescriptive environment for learners to access learning materials, participate in activities and interact with instructors or peers. In addition, LMSs provide the structure and support necessary to manage compliance initiatives through robust assignment rules and certification/recertification management workflows. By leveraging technology, LMSs streamline the learning process, offering flexibility, scalability and accessibility for organizations seeking to enhance their training programs and optimize knowledge transfer.



Learners today are no longer satisfied with static content or one-size-fits-all approaches.

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



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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 Artificial Intelligence (AI) and Machine Learning (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 Learning Management Systems Buyers Guide evaluates products based on capabilities across the following categories: Product Value, Personalization and Employee Experience, Skills, Authoring and Curation, Types of Learning Supported, Content Management, Social Collaboration, Industry Standards, HR Business Process and System Integration, Integration Methods, Integration with Enterprise Platforms/Tools, Mobile, Learning Platform Capabilities, User Roles and Personas, Learning Administrator Measurement, Learner-Related Capabilities, Manager-Related Capabilities and overall Investment in Capabilities. While many of the providers offer expanded features that are found in other aspects of learning technology (extended enterprise, learning experience platforms, learning content providers, etc.), it's important to note that the providers were only evaluated against the capabilities that are specific to the LMS offering.



Our rankings are reflective of how providers performed against our total criteria, which expand far beyond features and functionality.

The LMS market is highly populated with hundreds of offerings, many of which offer similarly described features. The research is indicative of software provider performance against a fixed list of criteria and does not account for areas of specialization such as industry focus or additional capabilities that are not part of the LMS. Our rankings are reflective of how providers performed against our total criteria, which expand far beyond features and functionality. It's imperative that buyers invest the time to develop specific requirements when searching for an LMS, and understand that there is no single "best" LMS on the market. Instead, there are many wonderful products available that align to a host of varying requirements. Always take care to

ensure you're clear on business requirements and seek to find the right solution for your specific organization.

This research evaluates the following software providers that offer products that address key elements of learning management systems as we define it: 360Learning, Absorb, Adobe, Axonify, BizLibrary, Bridge, Cegid, Cornerstone OnDemand, Dayforce, D2L, Docebo, eloomi, isolved, Learning Pool, LearnUpon, Oracle, PeopleFluent, SAP, Schoox, Skillsoft, TalentLMS, Thrive and Workday.



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: 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 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 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 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 learning management systems 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 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 Schoox and Cornerstone OnDemand. Companies that place in the top three of a category earn the designation of Leader. Oracle has done so in seven of the seven categories, Schoox in four, Cornerstone in three, SAP in two and Docebo, iSolved, Learning Pool, and LearnUpon each in one category.

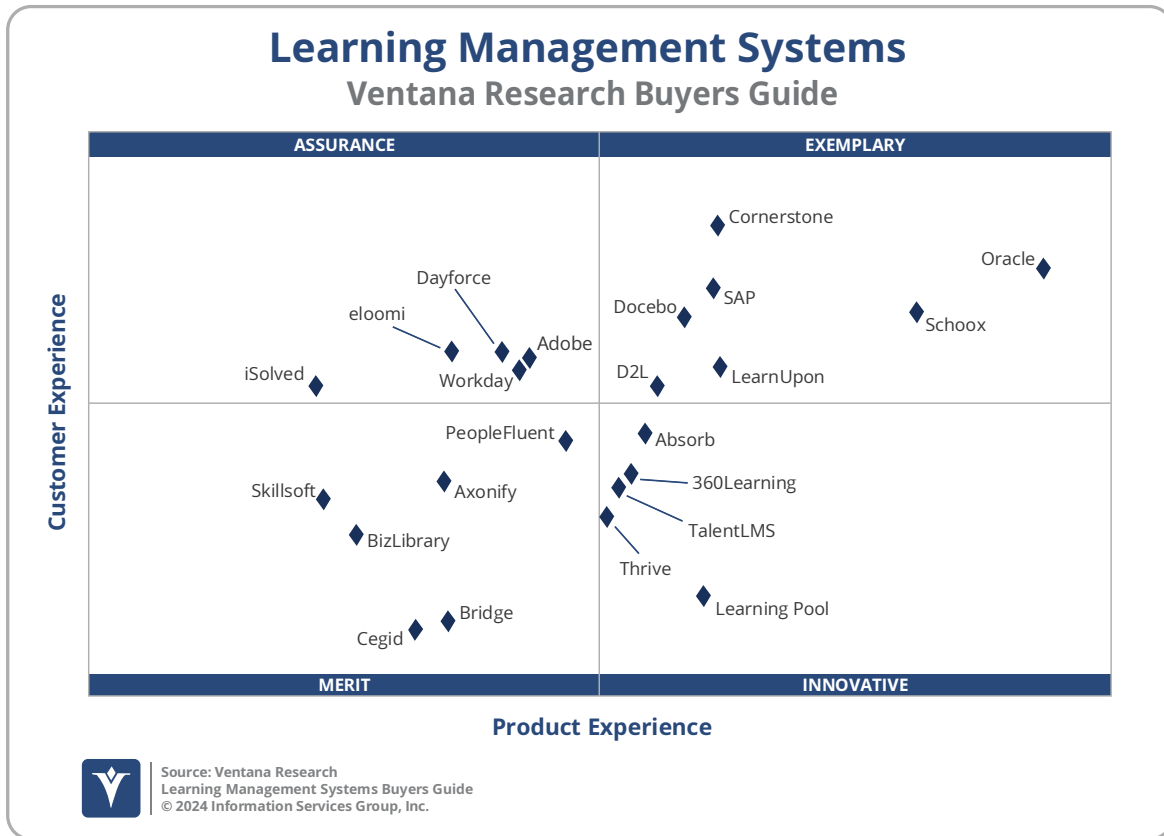
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance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

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

Learning Management Systems Overall

Providers	Grade	Performance
Oracle	A-	Leader 87.4%
Schoox	A-	Leader 84.8%
Cornerstone	A-	Leader 81.7%
LearnUpon	B++	76.5%
SAP	B++	76.4%
Docebo	B++	75.3%
Absorb	B+	74.1%
Thrive	B+	73.7%
D2L	B+	71.5%
360Learning	B+	70.1%
Learning Pool	B+	69.4%
PeopleFluent	B+	69.1%
TalentLMS	B	68.3%
Workday	B	66.1%
Dayforce	B	64.7%
Adobe	B	63.7%
Bridge	B	62.9%
eloomi	B	62.9%
Axonify	B-	60.9%
BizLibrary	B-	56.4%
Cegid	C++	56.1%
iSolved	C++	54.6%
Skillsoft	C++	53.2%

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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 OnDemand, D2L, Docebo, LearnUpon, 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 providers rated Innovative are: 360Learning, Absorb, Learning Pool, TalentLMS and Thrive.

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: Adobe, Dayforce, eloomi, isolved and Workday.

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: Axonify, BizLibrary, Cegid, PeopleFluent and Skillsoft.



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 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 (35%), Manageability (10%), Reliability (10%) and Usability (15%). This weighting impacted the resulting overall ratings in this research. Oracle, Schoox and LearnUpon were designated Product Experience Leaders. While not Leaders, Cornerstone, SAP and Docebo were also found to meet a broad range of enterprise product experience requirements.

Learning Management Systems Product Experience

Providers	Grade	Performance
Oracle	A-	Leader 69.7%
Schoox	A-	Leader 63.8%
LearnUpon	B++	Leader 56.6%
Cornerstone	B++	Leader 56.6%
SAP	B++	56.4%
Docebo	B+	55.5%
Learning Pool	B+	55.0%
D2L	B+	54.3%
Absorb	B+	53.9%
360Learning	B+	53.0%
TalentLMS	B	52.7%
Thrive	B++	52.3%
PeopleFluent	B+	51.2%
Adobe	B-	50.2%
Workday	B	50.0%
Dayforce	B	49.4%
eloomi	B-	48.3%
Bridge	B	45.9%
Axonify	B-	45.9%
Cegid	B-	44.9%
BizLibrary	C++	43.4%
iSolved	C++	42.4%
Skillsoft	C++	42.3%



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Many enterprises will only evaluate capabilities for workers in IT or administration, but the research identified the criticality of Usability (15% weighting) across a broader set of usage personas that should participate in learning management systems.



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 TCO/ROI (10%) and Validation (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 Cornerstone OnDemand, Oracle and SAP. These category Leaders best communicate commitment and dedication to customer needs. While not Leaders, Schoox, Docebo, Dayforce, eloomi and Adobe were also found to meet a broad range of enterprise learning management systems requirements.

Many software providers we evaluated did not have sufficient information available through the website and presentations to assess the customer experience. While several have customer case studies to promote success, others lack depth in articulating the commitment to customer experience and an enterprise’s learning management systems 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.

Learning Management Systems Customer Experience

Providers	Grade	Performance
Cornerstone	A	Leader 18.3%
Oracle	A	Leader 17.9%
SAP	A-	Leader 17.2%
Schoox	A-	16.9%
Docebo	A-	16.8%
Dayforce	B++	15.8%
eloomi	B++	15.8%
Adobe	B++	15.7%
Workday	B++	15.6%
LearnUpon	B++	15.4%
D2L	B++	15.1%
iSolved	B+	14.9%
Absorb	B+	14.1%
PeopleFluent	B	13.8%
360Learning	B	13.2%
Axonify	B	13.1%
TalentLMS	B	13.0%
Skillsoft	B	12.9%
Thrive	B	12.5%
BizLibrary	B-	11.9%
Learning Pool	C++	11.1%
Bridge	C+	9.6%
Cegid	C+	9.5%



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Appendix: Software Provider Inclusion

For inclusion in the Ventana Research Learning Management Systems 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, 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's offering must have the following characteristics: A product that specifically supports learning; manager and employee interactions; manager, analyst and administrative engagement; 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 vendors whether or not they choose to participate.

All software providers that offer relevant learning management systems 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	104	May 2024
Absorb	AbsorbLMS	5.118.0	May 2024
Adobe	Adobe Learning Manager	Update 96	March 2024
Axonify	Axonify	SaaS	May 2024
BizLibrary	BizLMS	SaaS	May 2024
Bridge	Bridge LMS	SaaS	May 2024
Cegid	Talentsoft	SaaS	April 2024
Cornerstone	Cornerstone Learning Management	SaaS	April 2024
D2L	D2L Brightspace	20.24.5	May 2024
Dayforce	Dayforce Learning	SaaS	May 2024
Docebo	Docebo	SaaS	May 2024
eloomi	eloomi	SaaS	May 2024
isolved	Learn and Grow	10.9	May 2024
Learning Pool	Learning Pool	SaaS	May 2024
LearnUpon	LearnUpon	SaaS	March 2024
Oracle	Oracle Learning	24B	April 2024
PeopleFluent	PeopleFluent Learning	24.04	April 2024
SAP	SAP SuccessFactors Learning	H12024	April 2024
Schoox	Schoox	SaaS	May 2024



Skillsoft	Percipio	SaaS	May 2024
TalentLMS	TalentLMS	SaaS	May 2024
Thrive	Thrive	SaaS	May 2024
Workday	Workday Learning	2024 R1	March 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
Cezanne	Cezanne Learning Management System	No	Yes
AllianceHCM	AllianceHCM LMS	Yes	No
Gyrus	GyrusAim LMS	No	No
Leapsome	Leapsome Learning	No	Yes
Learn Amp	Learn Amp LMS	No	Yes
PeopleGuru	PeopleGuru Learning	No	No
TalentQuest	TQ LMS	Yes	No
Viventium	Viventium LMS	No	No



About Ventana Research

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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