

Learning Services – Service Provider Compendium 2021

September 2021: Complimentary Abstract / Table of Contents



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Human Resources Outsourcing

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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Learning Services PEAK Matrix® characteristics

Leaders

Accenture, IBM, GP Strategies, and Raytheon

- Leaders have been focusing on adding proprietary technology solutions while expanding their scope of services and geographic presence. Their solutions have the capability to be integrated with current learning technology systems being used by enterprises
- They are constantly investing in partnerships and acquisitions to expand their service and technology portfolio

Major Contenders

Capgemini, Capita, CGS, Cognizant, Cegos, Conduent, Infosys, Hemsley Fraser, Infopro Learning, Learning Tribes, MPS Interactive, NIIT, The Judge Group, and TTEC

- Most Major Contenders are looking for avenues to increase their portfolio mix in terms of geographic coverage and scope of services across both breadth and depth
- They are focusing on partnering with other service providers and technology solutions vendors to bring in additional value to their learning services offering
- Many Major Contenders are also improving their proprietary technology capabilities through investments in proprietary platforms, Augmented Reality/Virtual Reality (AR/VR) solutions, and content curation capabilities

Aspirants

G-Cube Solutions, The Learning Factor, and Upside Learning

- Aspirants, on the other hand, are in the process of enhancing their geographic presence and establishing their market presence
- Their current emphasis is on differentiating themselves through pricing, specific subfunctions within learning, and partnerships with other providers to win more clients

Overview and abbreviated summary of key messages

This report provides detailed profiles of providers analyzed in the Learning Services Provider Landscape with PEAK Matrix® Assessment, June 2021 study. This report provides comprehensive snapshots of the 21 major learning services providers. Each profile highlights service provider's services and delivery capability along with presence across buyer sizes, industry, and learning sub-segments

Some of the findings in this report, among others, are:

Learning services provider landscape snapshot

- This section provides a snapshot of how the 21 learning services providers have been positioned on the PEAK Matrix® assessment
- It also helps understand the research methodology and framework adopted to conduct the analysis

Learning services vendor profiles

- This section provides detailed profiles off all the 21 vendors related to following dimensions:
- Company overview – includes leadership, functional capabilities across geographies, partnerships, key learning-related developments, technology solutions offered, and spread of learning services FTEs globally
- Learning services strategy – includes analysis of engagement model(s) adopted by the service provider including service coverage, shoring mix, and alignment towards project-based or non project-based engagements (project-based contract = duration < 1 year)
- Learning services portfolio – includes total number of clients & learners, major clients, split of operations by geography, and client split by industry and buyer-size

The report has over 21 service provider profiles

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service provider | learning services profile (page 1 of 2)

Service capability and strategy

service provider is a leading global professional services company, providing a broad range of services across strategy consulting, interactive, technology, and operations. It offers outcome-oriented learning solutions and outsourcing services across a range of enterprise learning processes and activities such as strategy and planning, learning experience design and delivery, administration, and proprietary methods and processes to keep learning investments aligned with business needs and results.

Key leaders
 • Chief Executive Officer

Headquarters: Dublin, Ireland
Website: www.service-provider.com

- Current learning services engagement model**
- service provider's customized solutions transform long-term employee operations with integrated services and technology solutions that enable clients to achieve new levels of talent development
 - service provider works closely with talent leaders and business executives to improve workforce performance and productivity, boost business agility, increase revenue, and reduce costs. It works with organizations to transform their learning business, while creating capacity and providing capability to the retained learning teams. It helps in evolving their current models to an integrated, future-focused strategy that reflects a fit-for-purpose integration of services and technology
 - Largely focuses on non-project-based (duration >1 year) engagements

Offshore ¹	Nearshore ¹	Onshore
-----------------------	------------------------	---------

Total FTEs providing Learning

Key learning services related partnerships & alliances

Areas	Partnerships & alliances
M&A partnership	<ul style="list-style-type: none"> • Workday • SAP SuccessFactors
Learning technology related	
Content services related	
Automation/analytics/AI related	
Others	

Content development & curation		Content delivery		Learning administration			Le		
Curriculum design	Content curation	Content development	Facilitated training	Tech-based learning	Registering & scheduling	Logistics	Maintenance	Contact center	Sou
Offered as proprietary solution	Offered through partnerships	Offered through partnerships	Offered through partnerships	Offered through partnerships	Offered through partnerships	Offered through partnerships	Offered through partnerships	Offered through partnerships	Offered through partnerships

¹ FTEs located in offshore (India, China, and Southeast Asia) or nearshore locations (Eastern Europe and Latin America) and delivering services for North America or Western Europe
 Source: Based on contractual and operational information as on December 2020

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service provider | learning services profile (page 2 of 2)

Portfolio mix

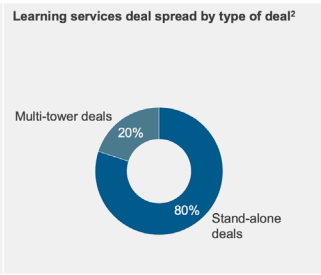
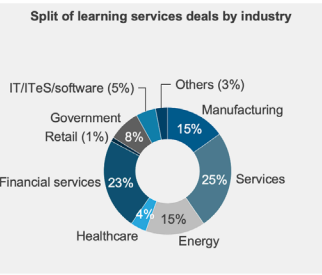
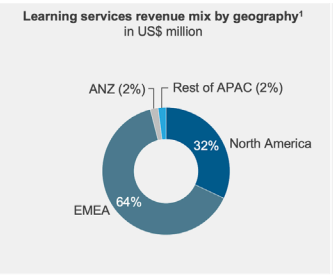
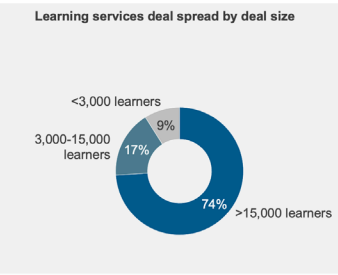
Learning services experience

Total number of active deals: XXX

Total number of learners covered in a year: XXX

Major clients

- Financial services client based in EMEA
- Global high-tech client based in North America
- Global natural resources client based in EMEA



¹ ANZ refers to Australia & New Zealand and EMEA refers to Europe-UK, Middle East and Africa
² Stand-alone deals have only Learning Services in scope whereas multi-tower deals may have other HR services such as payroll, benefits, and others in scope
 Source: Based on contractual and operational information as on December 2020

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Research calendar

Human Resources Outsourcing

■ Published
 ■ Planned
 ■ Current release

Flagship HRO reports

	Release date
Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment with Services Provider Landscape 2021	January 2021
Multi-process Human Resources Outsourcing (MPHRO) Services – Service Provider Compendium 2021	February 2021
Multi-process Human Resources Outsourcing (MPHRO) – State of the Market Report 2021	February 2021
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2021	March 2021
Rewards and Recognition (R&R) Solutions State of the Market Report 2021: The Era for Modernizing Employee Engagement	June 2021
Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2021	June 2021
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Service Provider Landscape 2021	August 2021

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Learning Services State of the Market Report 2021	Q4 2021
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2021	Q4 2021
Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment 2021	Q4 2021
Multi-country Payroll (MCP) Solutions Annual Report 2021	Q4 2021

Thematic HRO reports

	Release date
Price Trends in HRO	September 2020
Employment Outsourcing Models	March 2021
Employee Experience Management (EXM) Platforms	June 2021
Employee Experience Management (EXM) Platforms	June 2021

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