

Learning Experience Platform (LXP) – Provider Compendium 2023

November 2022: Complimentary Abstract / Table of Contents



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Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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This report is based on two key sources of proprietary information

- Proprietary database of LXP providers
 - The database tracks the following elements of each contract:
 - Breadth and depth of the product functionalities
 - Analytics, reporting, and dashboards
 - Investments and innovations
 - Partnerships with service providers and other technology providers
 - Support in terms of product training, maintenance, and other support services
 - Availability and adoption of commercial model(s)
 - Portfolio coverage in terms of industry, geography, process areas, and buyer size
 - Provider performance in terms of revenue and clients
-
- Demonstrations and interactions with LXP providers and other industry stakeholders
 - Detailed demos and interviews with LXP providers for a comprehensive view of the products
 - Interviews with providers’ reference clients
 - Executive-level discussions with providers that cover:
 - ◆ Current state of the market
 - ◆ Opportunities and challenges
 - ◆ Expected direction of movement in the industry
 - ◆ LXP provider vision and roadmap
 - Executive-level discussions with industry enablers / specialist system integrators to get the buyer perspective and to reaffirm the findings from other sources
 - Conference meetings with enterprise LXP buyers to understand:
 - ◆ Vision and objectives
 - ◆ Buying criteria
 - ◆ Apprehensions and challenges
 - ◆ Outcomes achieved
 - ◆ Future direction

Providers assessed¹



¹ Assessment for Docebo, Fuse Universal, HowNow, and Learning Pool exclude provider inputs and are based on Everest Group’s proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group’s interactions with LXP buyers

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract-specific will only be presented back to the industry in an aggregated fashion

Introduction

Learning and Development (L&D) has never been more crucial for organizations than it is today. The pressing need to upskill/reskill the workforce at scale and the increased focus on personalizing the learning experience for employees have led to the emergence of solutions such as LXP in the market. These platforms mark a fresh approach to corporate learning that makes it more engaging and accessible for employees. At the same time, they help talent managers foster a culture of continuous learning throughout their organizations and transition to a data-driven and skills-based learning landscape.

The LXP market is currently thriving, with several providers operating in the space including next-generation start-ups and traditional Learning Management System (LMS) players that have diversified to provide a holistic learning experience to users. These platforms are evolving rapidly, with providers increasing the breadth and depth of their functionalities/offerings and global outreach to better serve the clients.

In this research, we present detailed profiles of 15 LXP providers that have featured on the [Learning Experience Platform \(LXP\) Products PEAK Matrix® Assessment 2022](#). Our assessment is based on Everest Group’s annual RFI process for 2022, interactions with leading LXP providers, client reference checks, and an in-depth analysis of the LXP market.

This research includes the following components:

- PEAK Matrix Assessment of LXP providers
- Detailed profiles of 15 LXP providers

Scope of this report



Coverage
Across all industries,
geographies, and
buyer segments



Providers
Coverage across 15 LXP
providers



Assessment
Assessing LXP products
available in the market for
independent licensing.
Operational information
and product information
as of March 2022

Overview and abbreviated summary of key messages

This report examines the detailed profiles of providers analyzed in the Learning Experience Platform (LXP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2022. This report provides comprehensive snapshots of the 15 major LXP providers. Each profile highlights the provider’s technology capabilities along with presence across geographies, industries, and buyer sizes sub-segments.

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

LXP provider landscape snapshot

- This section provides a snapshot of how the 15 LXP providers have been positioned on the PEAK Matrix assessment
- It also helps understand the research methodology and framework adopted to conduct the analysis

LXP provider profiles

- LXP company overview – Includes company overview, key leaders, list of key deals, investments, and announcements, LXP revenue, key partners, and LXP revenue by industry, geography, and buyer size
- LXP technology capabilities and offerings – Includes detailed capabilities and offerings of the LXP providers such as sub-dimensions of content management, learner experience, admin experience, integration capabilities, analytics, deployment options, training, and support, among many others
- LXP sourcing considerations – Includes assessment of the performance of the provider as per the PEAK Matrix along with key strengths and limitations

The study provides detailed view of providers' LXP offerings & capabilities as well as key strengths & limitations | Snapshots to illustrate the depth of report

Learning Experience Platform (LXP) – Provider Compendium 2023

Provider | LXP product profile (page 1 of 4)

Everest Group assessment – Major Contender

Market impact				Vision and strategy	Technical
Market adoption	Portfolio mix	Value delivered	Overall		

Strengths

- Provider 1 added XYZ new enterprise clients in 2021 resulting in about XYZ% year-on-year growth in its number of clients. Our estimates indicate that it has the highest share of the LXP market as well as the largest portfolio of enterprise clients. It also has a balanced client portfolio with significant presence across key geographies, industries, process areas, and buyer sizes
- It offers connectors to integrate with leading enterprise information systems (XYZ). Clients rate it highly for its scalability. It has also partnered with external content providers such as XYZ for developing extensive libraries of content

Limitations

- When...
- Pro...
- Bas...
- Cli...

Company overview

Provider 1 was founded in 2002 to bring online learning into organizations in a collaborative way. Its comprehensive suite of digital learning products and services includes an LMS, an LXP, a Learning Record Store (LRS), agile learning content development tools, around 600 off-the-shelf e-learning modules, and bespoke content development services. With nine offices around the UK and the US, it currently caters to learners in nearly 30 countries across 42 different languages

Headquarters: Toronto, Canada **Website:**

Key leaders

- XYZ, CEO and Co-founder
- XYZ, Chief Product Officer
- XYZ, Chief Technology Officer

Key deals, investments, and announcements (not exhaustive)

- Acquired XYZ, a US-based eLearning and analytics company, in January 2022
- Partnered with XYZ to become exclusive resellers of provider's products across the Netherlands and Belgium
- Invested in supporting customized PowerPoint presentation downloads with a single click
- Raised \$XYZ million in Series D funding co-led by XYZ in April 2021

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Learning Experience Platform (LXP) – Provider Compendium 2023

Provider | LXP product profile (page 2 of 4)

Overview

Company overview

Provider 1 was founded in 2002 to bring online learning into organizations in a collaborative way. Its comprehensive suite of digital learning products and services includes an LMS, an LXP, a Learning Record Store (LRS), agile learning content development tools, around 600 off-the-shelf e-learning modules, and bespoke content development services. With nine offices around the UK and the US, it currently caters to learners in nearly 30 countries across 42 different languages

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Provider | LXP product profile (page 3 of 4)

Capabilities

Legend: Available (Green), In the roadmap (Yellow), Available via partner (Blue), Not available (Grey)

Capability & offerings	Available	In the roadmap	Available via partner	Not available
Content management	Ability to aggregate content from multiple sources including external content providers	Ability to conduct smart search and apply filters to discover content	Ability to create content by learner and/or SME using built-in authoring tool	Ability to support different content formats (video, audio, article, etc.)
	Ability to offer micro-learning content	Ability to create assessments and quizzes	Ability to construct survey/polls to capture feedback	Ability to curate learning pathways and playlists
Learner experience	Personalized homepage for every learner	Content recommendations to learners based on their profile / skills / role / career path	Content recommendations based on the most popular / trending courses	Content recommendations based on user-defined interests
	Content recommendations using AI/ML	Social and collaborative learning (like, share, comment, rate content, discussion threads, etc.)		Gamification features such as leaderboards, reward points, and badges
Admin experience	Ability to customize the platform by admin	Ability to assign role-based access controls (admin, team manager, content creator, etc.)		Ability to create logic to segment users (based on roles, departments, geographies, etc.)
	Ability to manage translation and language of the platform and content	Ability to create, modify, and/or cancel a course/content by admin	Reporting mechanism to filter and remove inappropriate content by the admin	Ability to perform bulk actions such as enroll, un-enroll, and message users
Additional features	Ability to measure skills gap using a skill-role framework	Ability to offer mentoring and coaching functionality	Ability to support extended enterprise (customers, partners, contractors, etc.)	Ability to offer chatbot/chat functionality for stakeholder communication
Integration capabilities¹	MS Teams	Zoom	ERP	HRIS/HRMS
	Workday	SAP SuccessFactors	Salesforce	SharePoint
				CRM
				LMS or any other type of learning system integration

¹ Provider 1 can integrate with the existing systems of clients on a custom basis

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Research calendar

Human Resources Outsourcing

Published
 Planned
 Current release

Reports title	Release date
Employee Experience Management (EXM) Platforms PEAK Matrix® Assessment 2022	March 2022
Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2022	March 2022
Navigating Change with Technology for Better RoI	May 2022
Learning Experience Platforms (LXPs)	June 2022
360-degree Digital Adoption	June 2022
The Payroll Transformation Journey	June 2022
Employer of Record (EOR) – Solutions Provider Landscape with PEAK Matrix® Assessment 2022	September 2022
Learning Experience Platform (LXP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2022	September 2022
Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2022	September 2022
Employee Experience Management (EXM) State of the Market Report 2023	October 2022
Learning Experience Platform (LXP) – Provider Compendium 2023	November 2022
Digital Adoption Platform (DAP) State of the Market Report 2023	Q4 2022
Employer of Record (EOR) – Provider Compendium 2023	Q4 2022
Earned Wage Access in the US Provider Compendium 2023	Q4 2022
Learning Experience Platform (LXP) State of the Market Report 2023	Q4 2022

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