

# The Learning Technology Landscape

**T2S2**

What you REALLY need to know...

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# Europe's #1 HR Industry Analyst

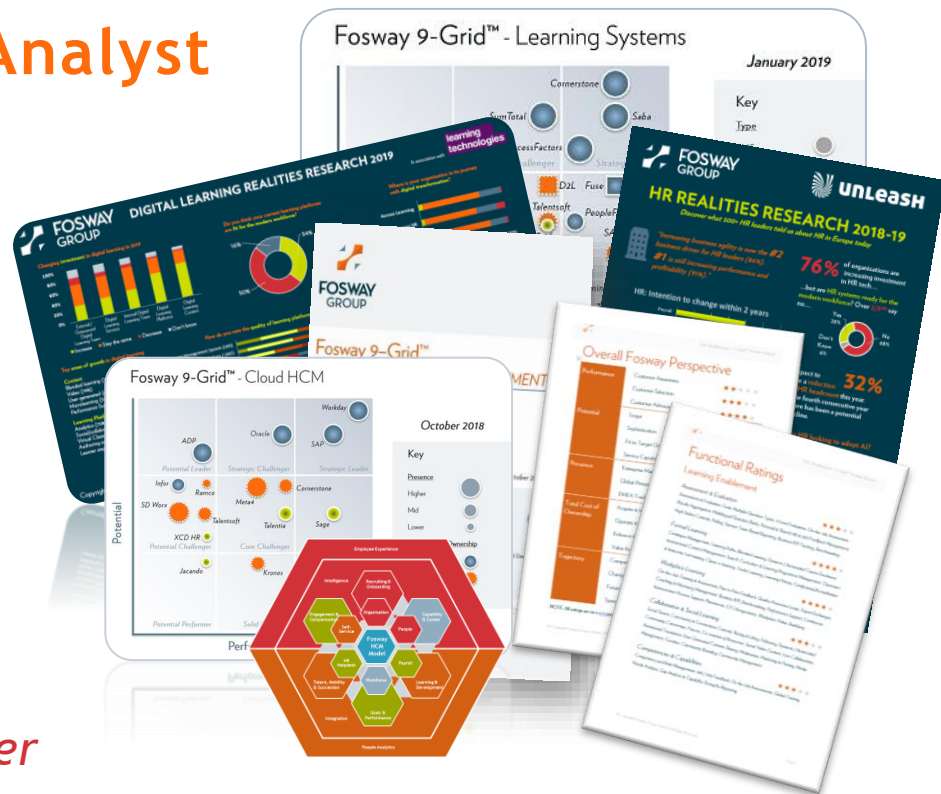
Founded 1996

In-depth corporate research on  
**Next Gen HR, Talent and Learning**

**Analyst & advisory services to  
European & International HQ  
multi-nationals and corporates**

**Independent vendor research  
and EMEA market commentary**

*Make better HR buying decisions faster*



What are you doing now that  
excites you most about the  
**future of learning**  
in your organisation ?

The  
Learning  
Technology  
Landscape ...



KEEP  
CALM  
AND  
CHECK  
THE FACTS



Unique market data from Fosway's  
strategic research partnership with

**learning  
technologies**

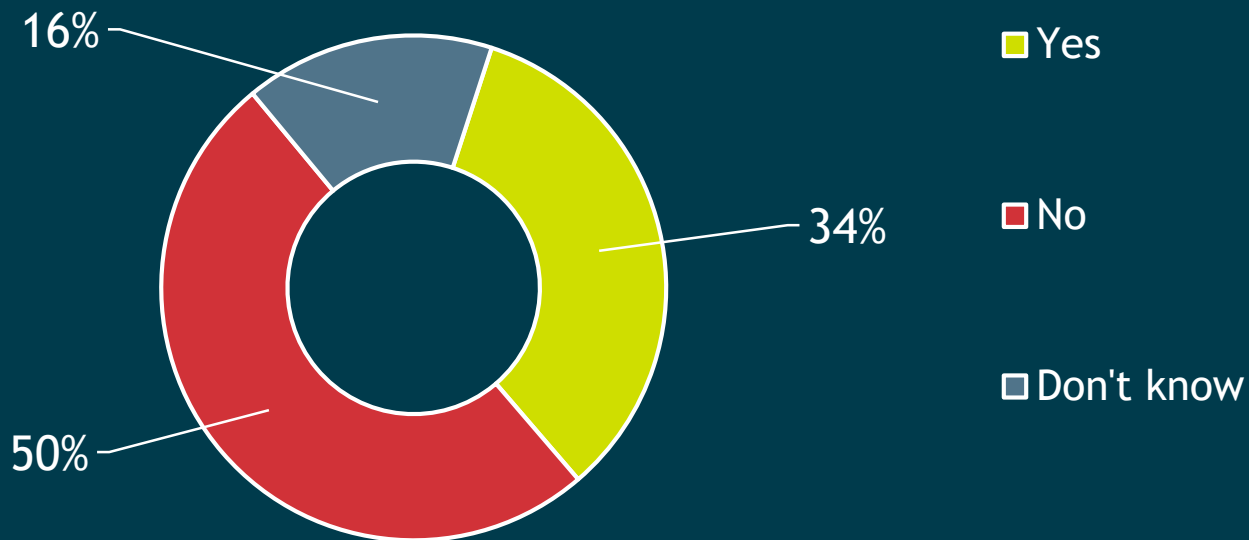
**88%**  
of respondents  
**European**  
(11% APAC)

**40%** Respondents from  
Organisations  
**> 5000 Employees**

**65%** Respondents from  
Organisations  
**> 1000 Employees**

***Approx. 800 survey respondents so far***

## Do you think your current learning platforms are fit for the modern workforce?



*Digital Learning Realities  
Fosway Group 2019*

# What makes Learning Technology fit for the future?

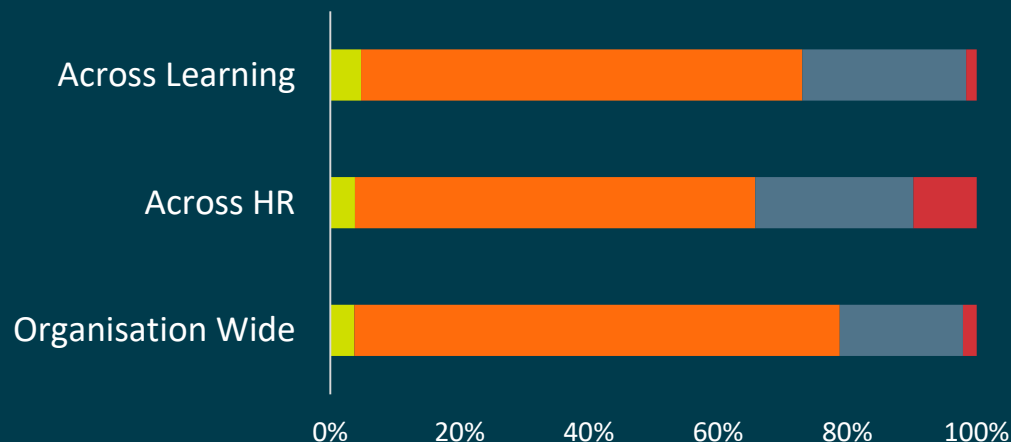
- ▶ Why do you have Learning Technology that isn't fit for the modern workforce?
- ▶ What do we need to change to make our Learning Technology fit for the modern workforce?
- ▶ What suppliers are a good fit? Who are you using who is a poor fit for the modern workforce? Why?



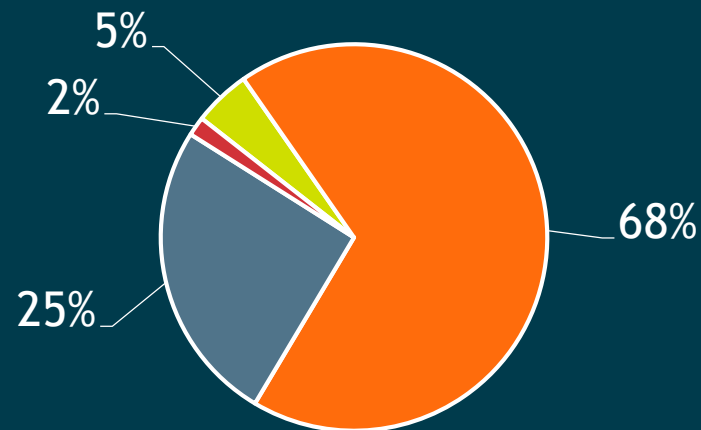
# Your Experience of Digital Learning



## Where is your organisation in its journey with digital transformation?



### Across Learning

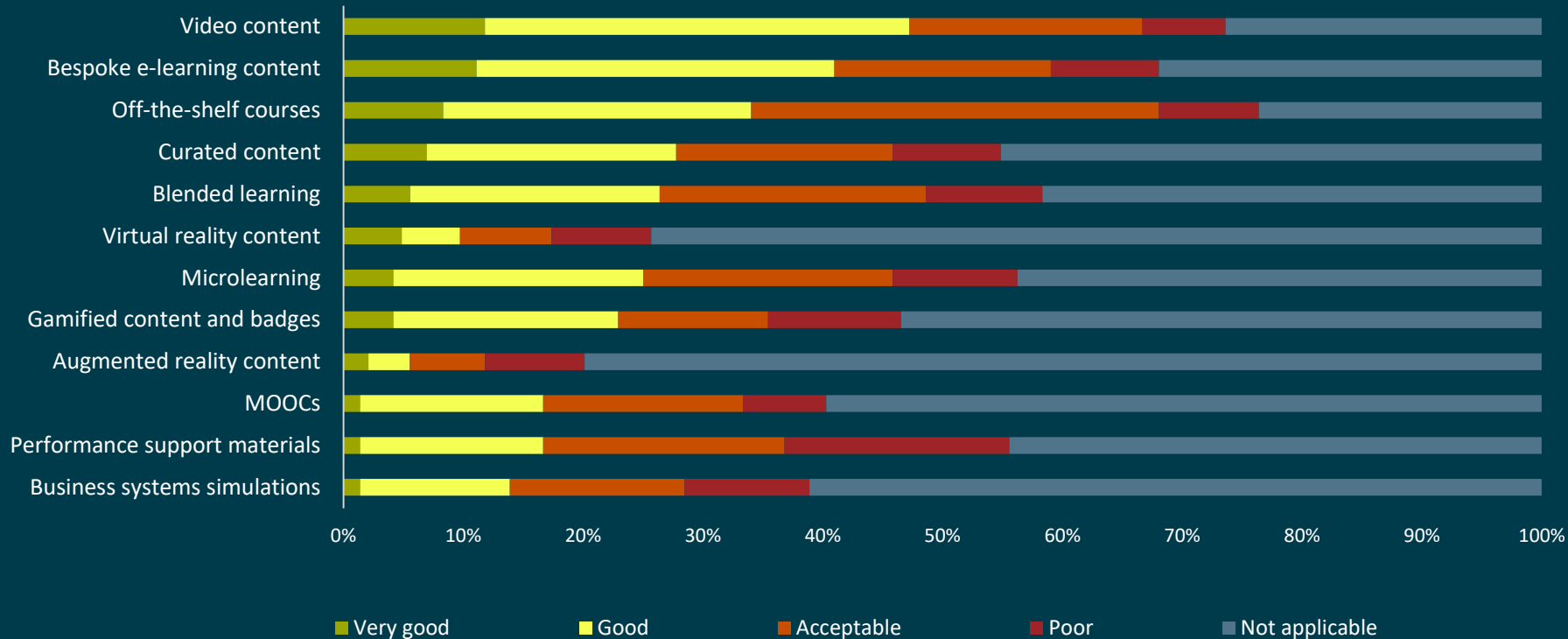


Completed In progress Planning Not applicable

Completed In progress Planning Not applicable

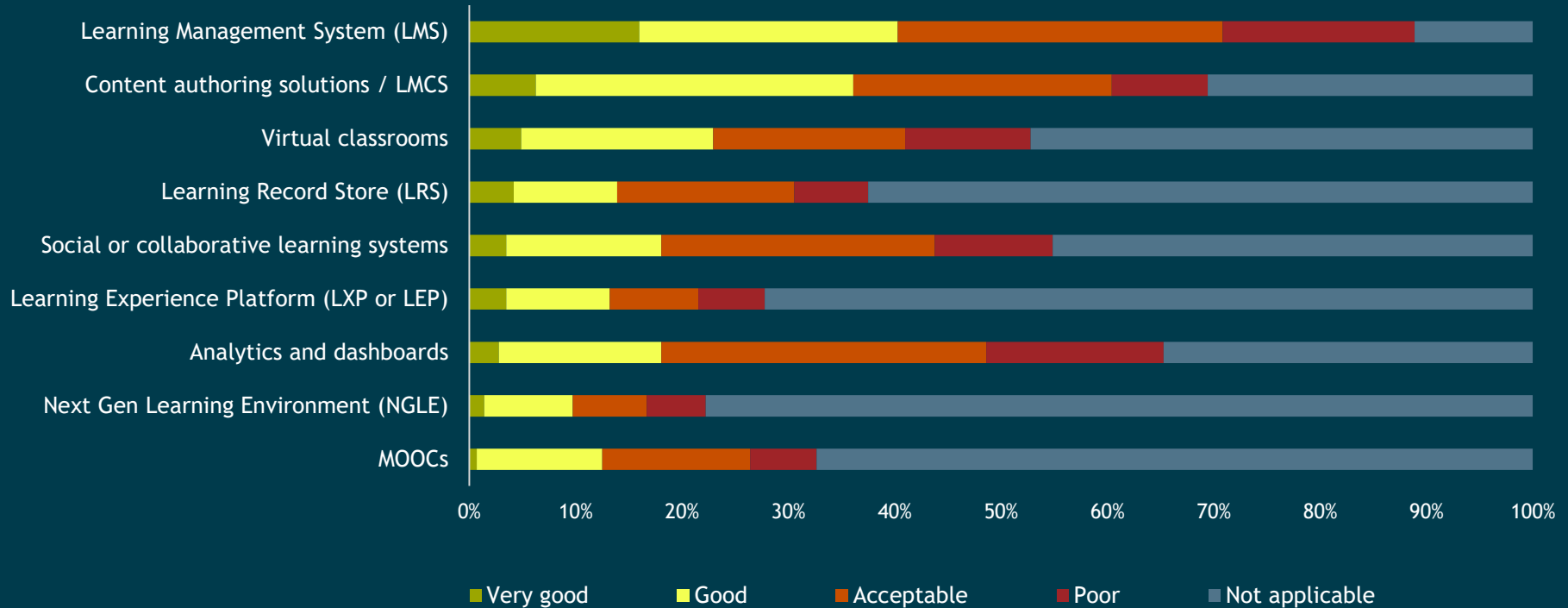
## YOUR EXPERIENCE OF DIGITAL LEARNING CONTENT

How do you rate the quality of digital learning content you get from your suppliers?



## YOUR EXPERIENCE OF DIGITAL LEARNING PLATFORMS

How do you rate the quality of digital learning platforms provided by your suppliers?



# Why is the CUSTOMER's view of Learning Technology so variable?

- ▶ What do you do to maximise the quality of your learning solutions?
- ▶ How has this changed over time?
- ▶ How do you manage innovation in “new” forms of learning content?

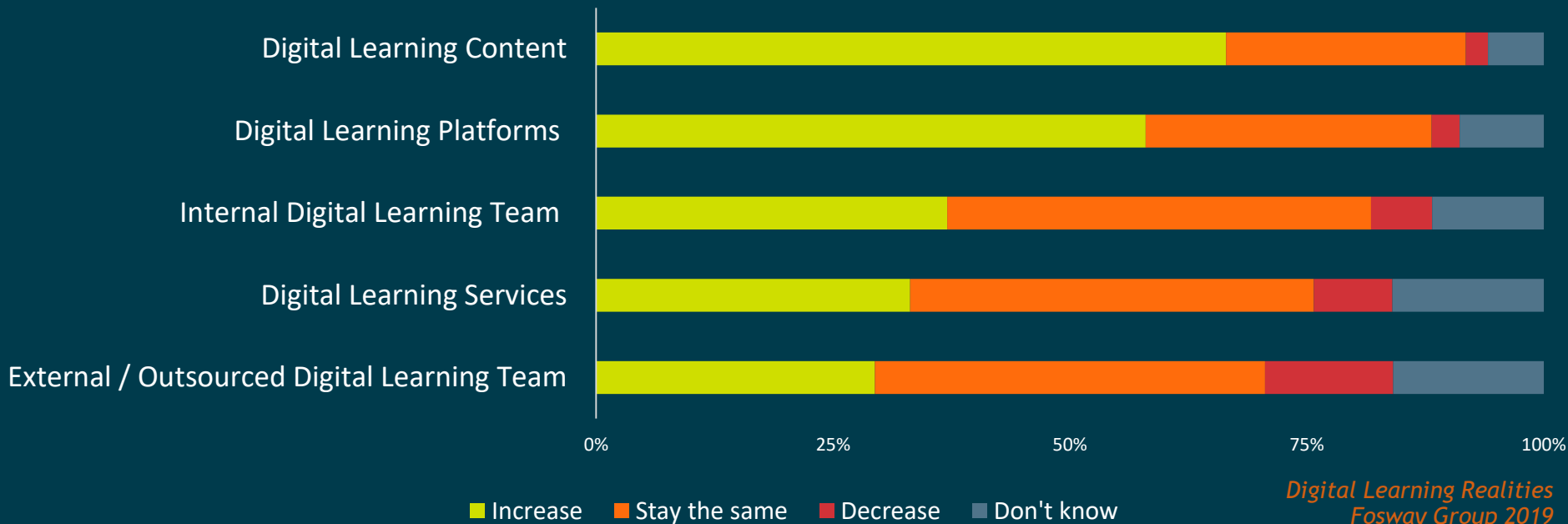


# Building Your Digital Learning Ecosystem

# Building a Modern Learning Architecture



## How do you expect your investment in digital learning to change over the year ahead?



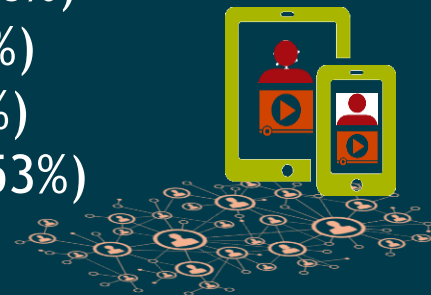
# Digital Learning - Top Growth Areas

## Content

Blended learning (74%)  
Video (74%)  
User-generated (64%)  
Microlearning (59%)  
Performance Support (56%)

## Learning Platforms

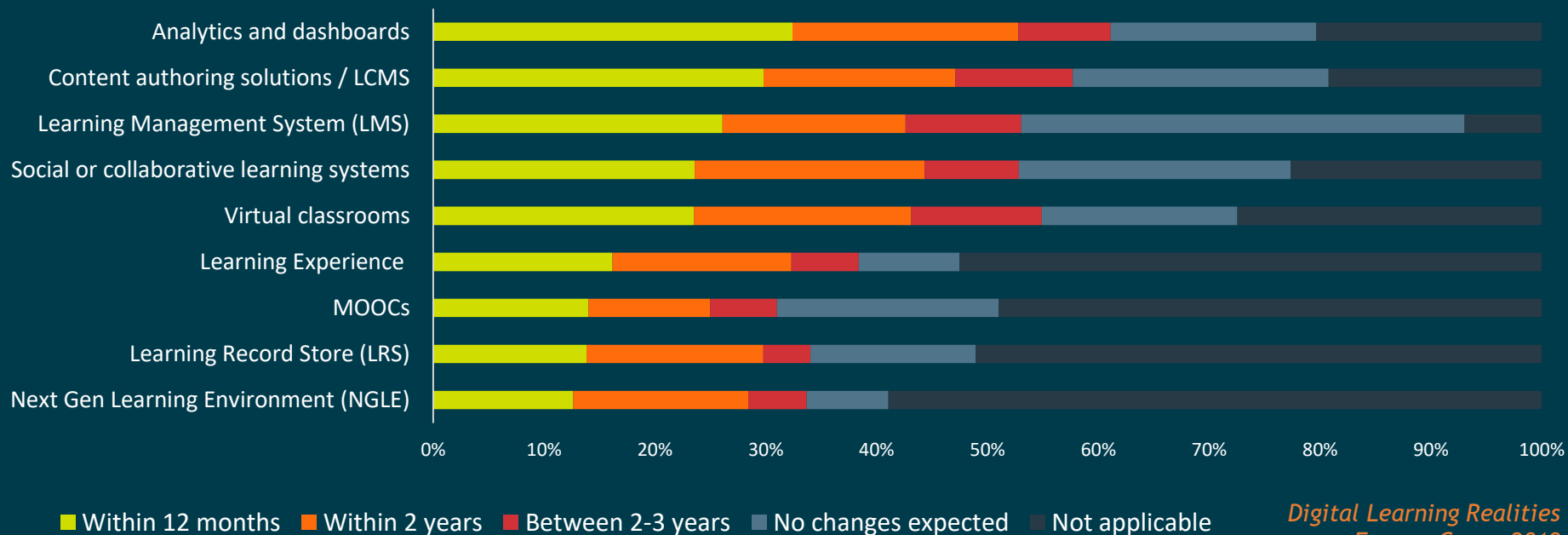
Analytics (75%)  
Social/collaborative (70%)  
Virtual Classrooms (68%)  
Authoring systems (61%)  
Learner engagement (53%)  
LXP (44%)



*Digital Learning Realities  
Fosway Group 2019*



## When do you intend to change your learning platforms in the future?



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# Learning Investment

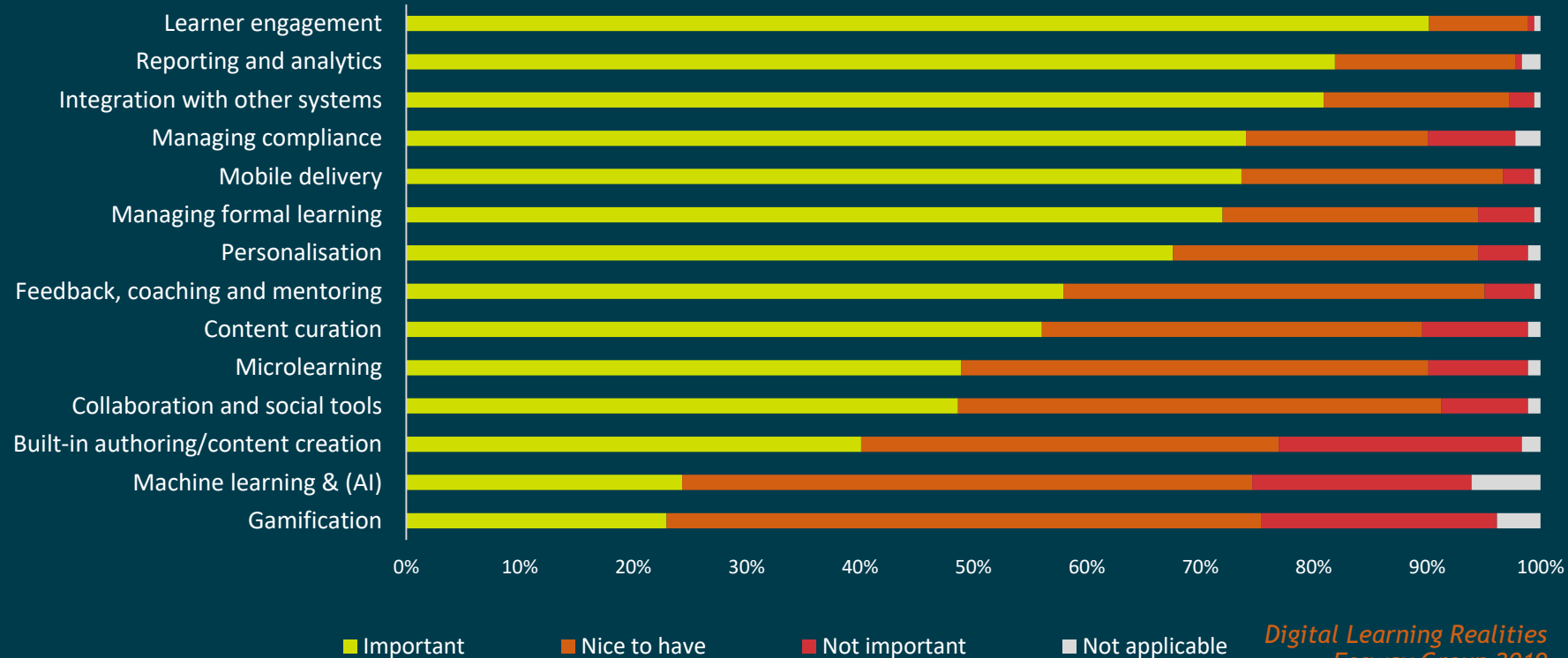
- ▶ How do you make sure you are investing the right amount in the right areas for your business?
- ▶ What is your best fit, and why?
- ▶ Do you understand your case for change?

## What digital learning approaches are your highest priority for improvement?

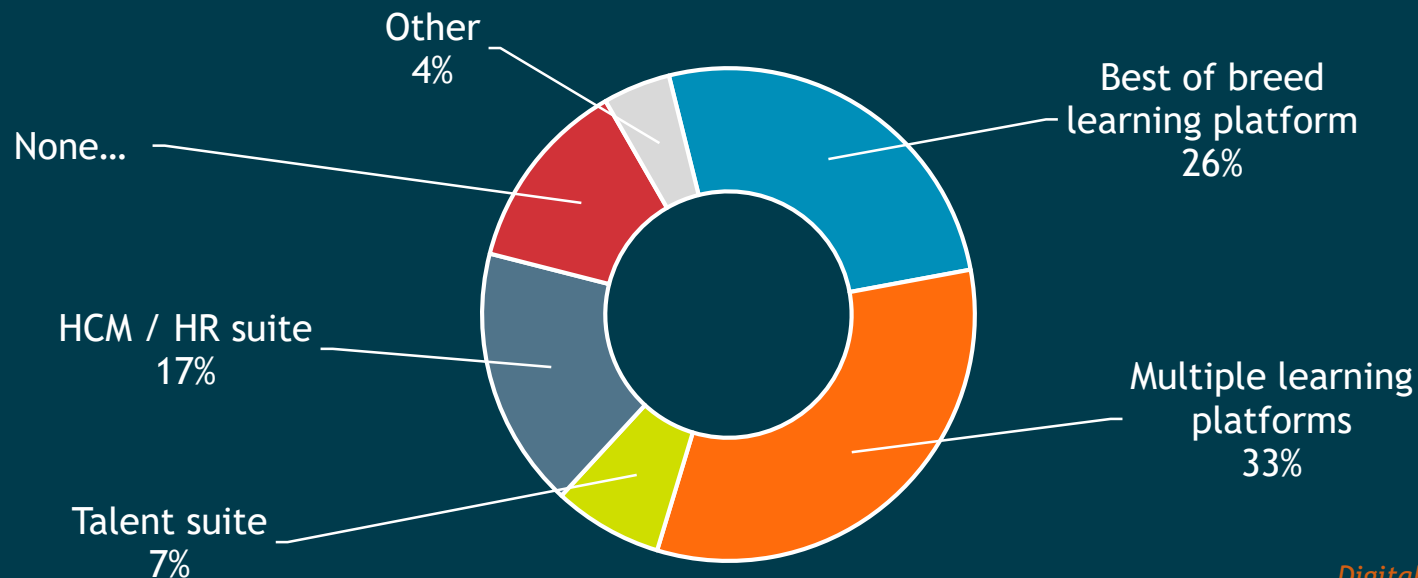


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## How important are the following platform features to improving your digital learning approach?



## How does learning in your organisation fit with the rest of your HR technology infrastructure?



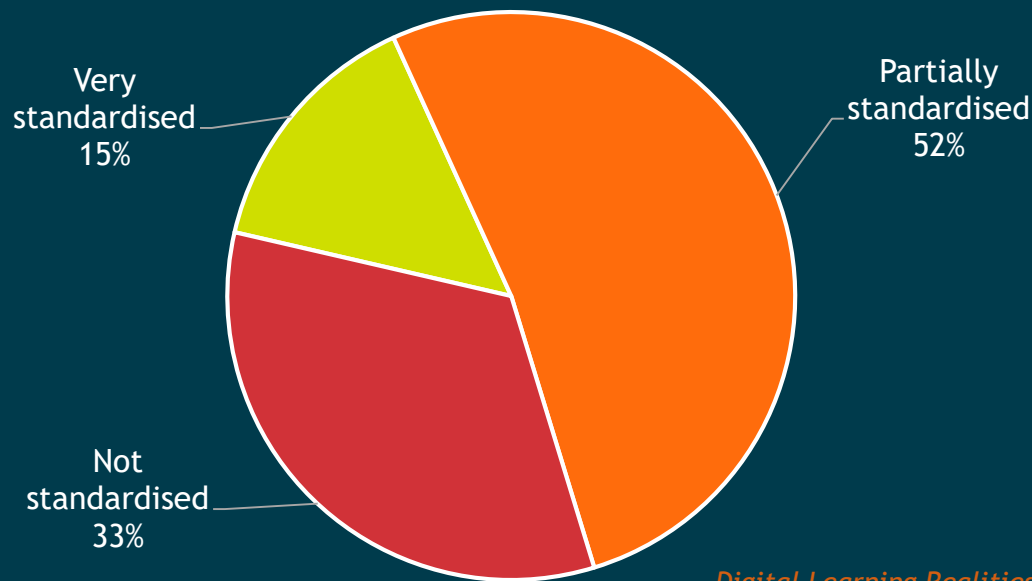
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**Most have a  
fragmented  
ecosystem - 85%**

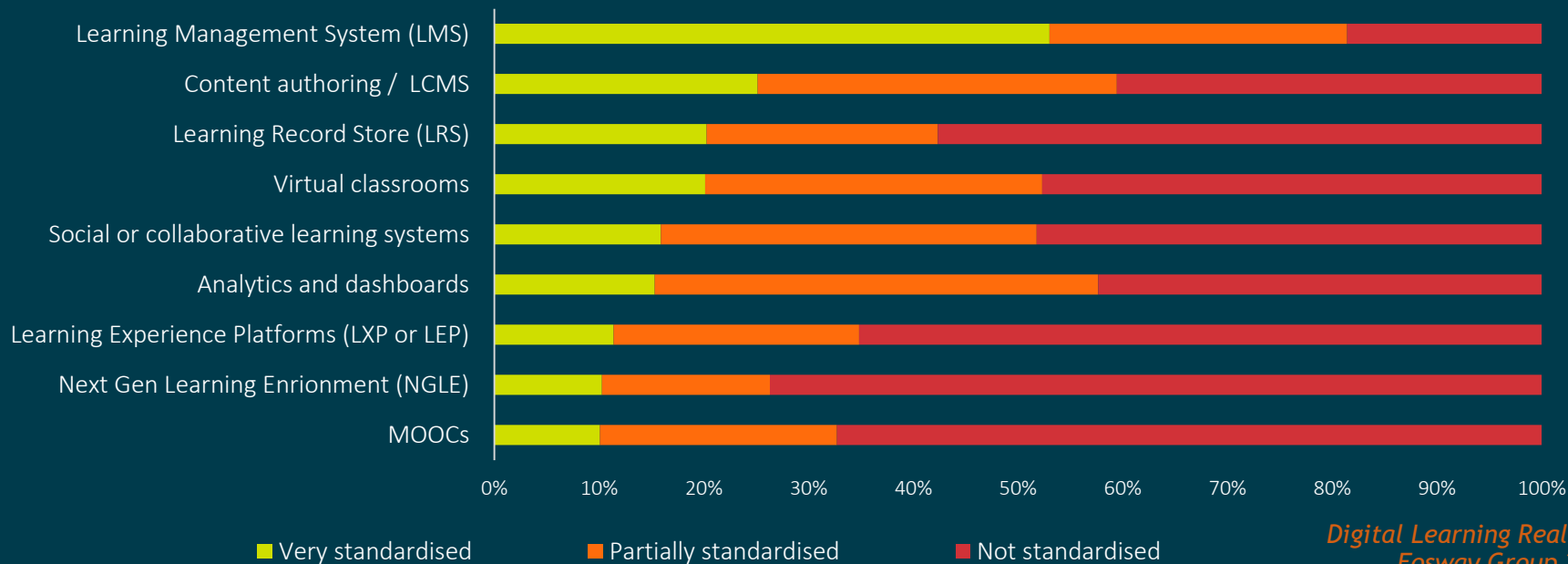
Is the level of standardisation a  
problem, or should we be  
revelling in diversity?

How standardised is your approach to digital learning  
across your organisation?



*Digital Learning Realities  
Fosway Group 2018*

## How standardised are the learning platforms across your organisation?



*Digital Learning Realities  
Fosway Group 2019*

# How are your solutions changing and what is driving that change?

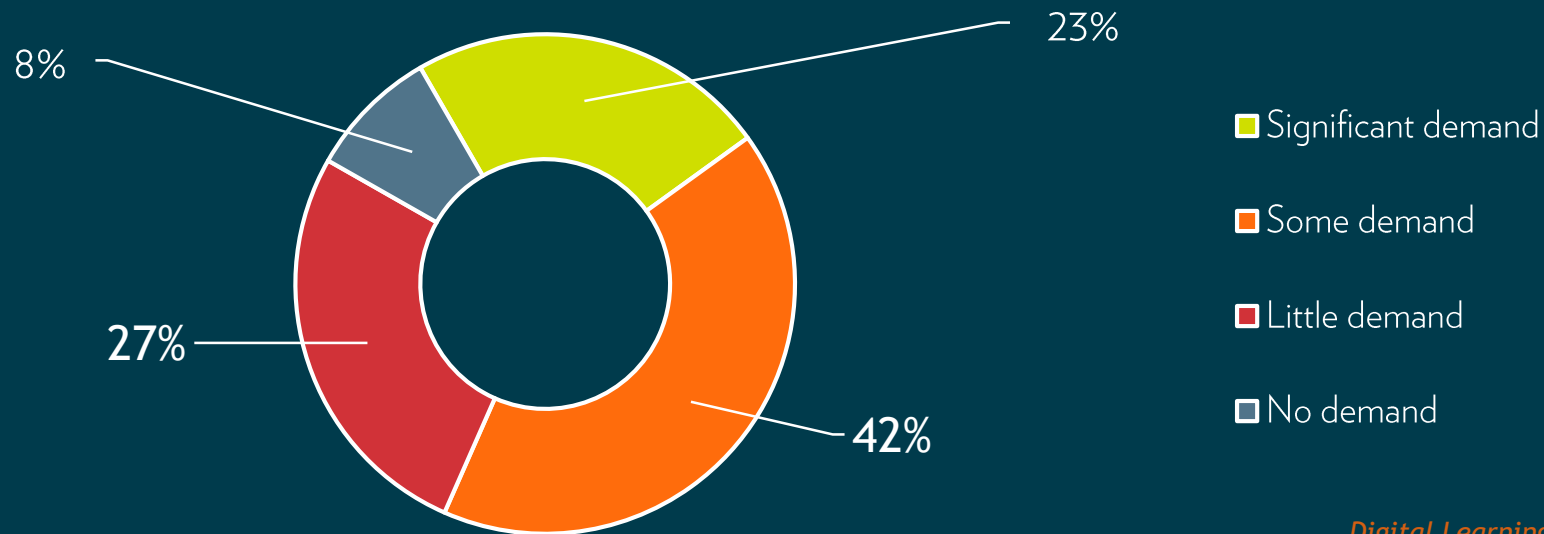
- ▶ What have been the most radical changes you have made in your approach to Learning Technology?
- ▶ What's driving those changes?
- ▶ What changes have had the most **positive** or **negative** impact?





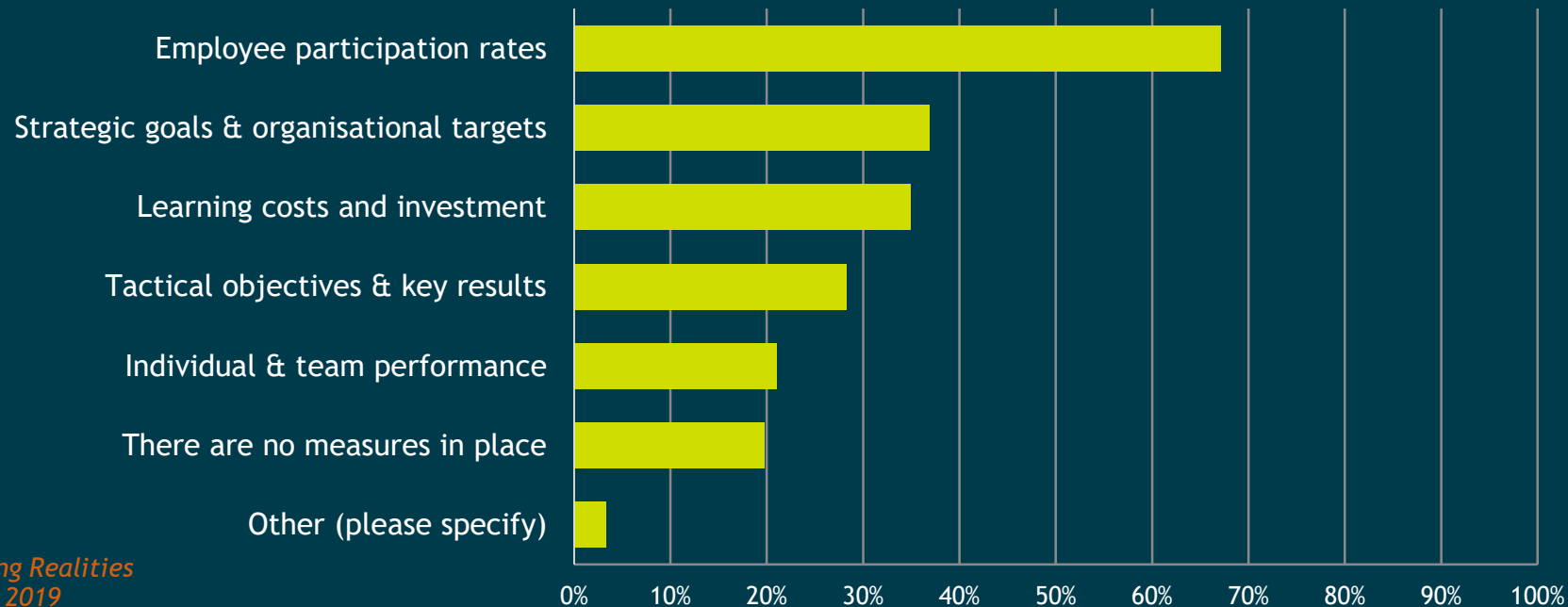
Are you really  
making an impact?

## How much demand is there from stakeholders to prove the business value of digital learning in your organisation?



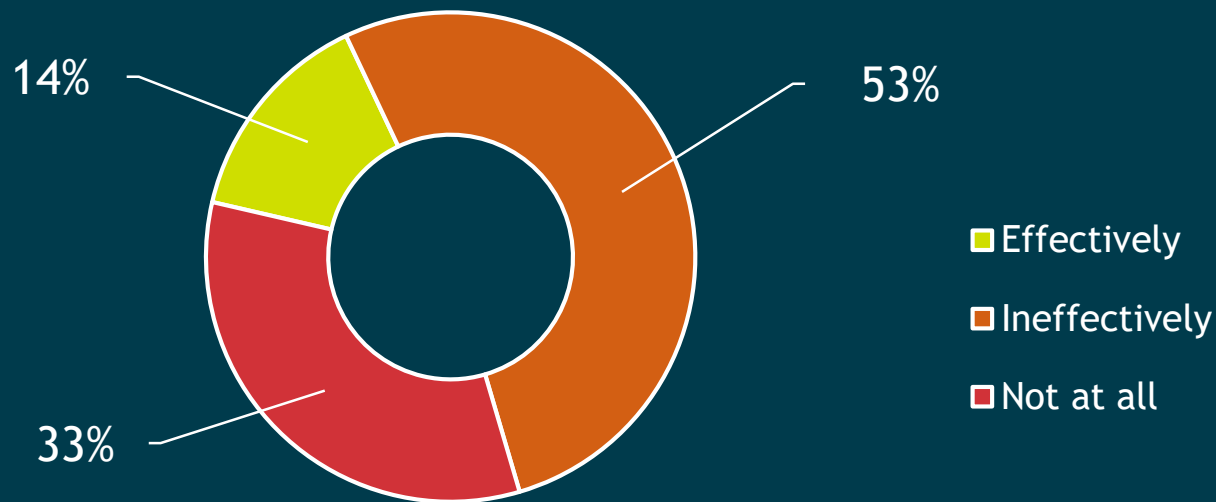
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## What measures do you use to provide the impact and value of digital learning in your organisation?



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## How effectively does your organisation measure the impact of digital learning today?



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# Who is the most important stakeholder you need to engage to show the value of L&D?

- ▶ How close are you to integrating business data into your analysis?
- ▶ What are the biggest barriers to moving you forward with measurement?
- ▶ How much does your lack / wealth of data around your real impact effect your organisation's investment in learning?



Make better  
learning technology  
buying decisions ...

# Significant pressure for Vendors to respond to more diverse / next gen requirements

## ... e.g. the factors in Fosway's Learning Systems analysis

### ▶ **Learning Enablement** **- 107 factors**

- Assessment & Evaluation
- Formal Learning
- Workplace Learning
- Collaborative & Social Learning
- Competencies & Capabilities
- Development Planning
- Extended Enterprise
- Learning Content & Asset Management

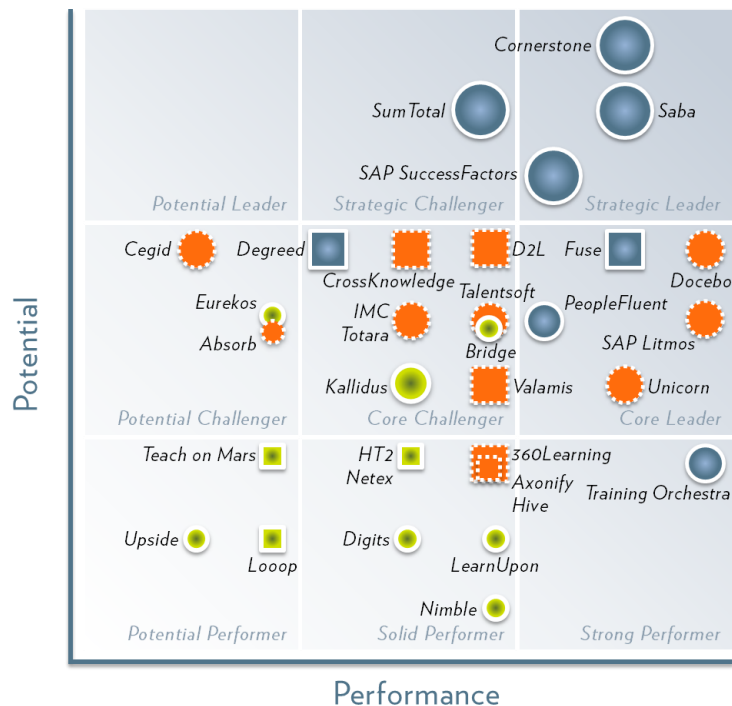
### ▶ **User Experience** **- 69 factors**

- Experience Administration
- Learner Portal
- Learner Relationship Tools
- Manager Portal
- Mobile Learning
- Analytics, Dashboards and Reporting

### ▶ **People, Finance & Systems Mgmt** **- 46 factors**

- Organisation & People Management
- Finance, Budget & Ecommerce Management
- Integrations (standard out of the box connectors)

# Fosway 9-Grid™ - Learning Systems



January 2019

Key

Type

LMS

NGLE

Presence

Higher

Mid

Lower

Total Cost of Ownership

Higher

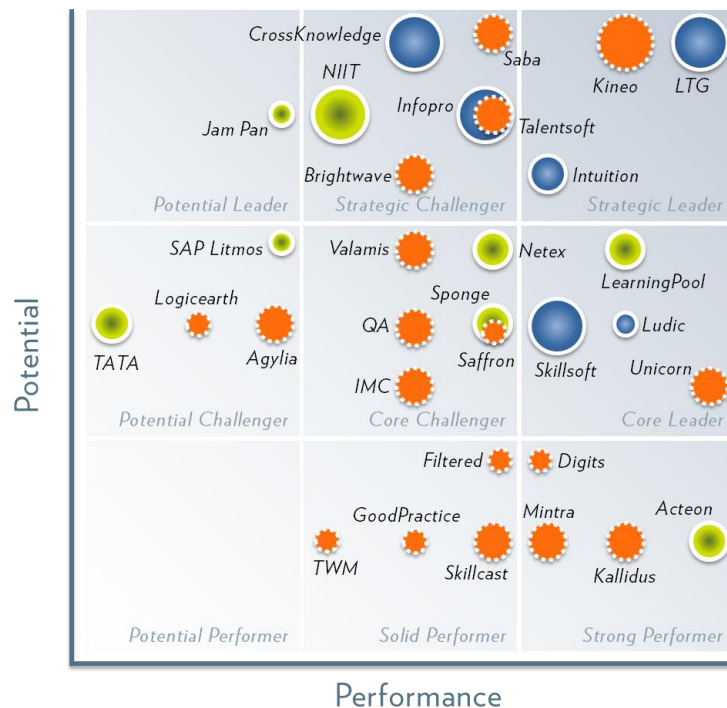
Mid

Lower

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# Fosway 9-Grid™ - Digital Learning



January 2019

## Key

### Presence

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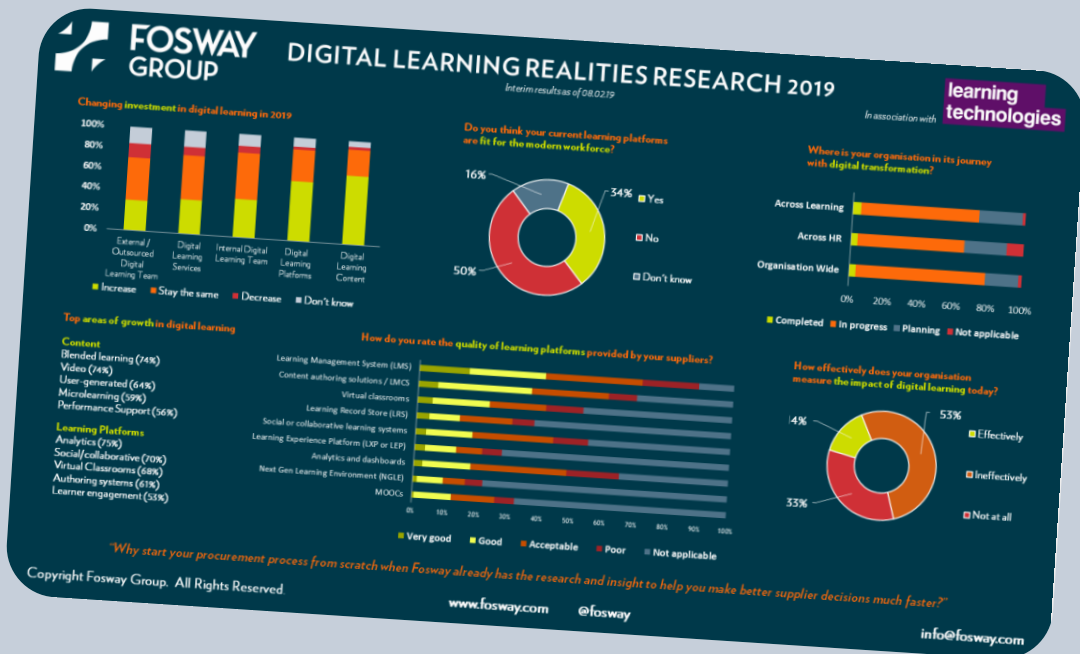
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# Who are your digital learning / learning tech suppliers, and are they fit for YOUR future?

- ▶ How do your organisations business priorities really shape the way you engage with suppliers?
- ▶ What are your drivers for change?
- ▶ How can Fosway's research and decision tools help you make better buying decisions faster?

# Download the Infographic\* Today

[www.fosway.com](http://www.fosway.com)



\* Interim results as of 1<sup>st</sup> February 2019

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