



9-Grid™ for Digital Learning

Ask the Analyst

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Europe's #1 HR Industry Analyst

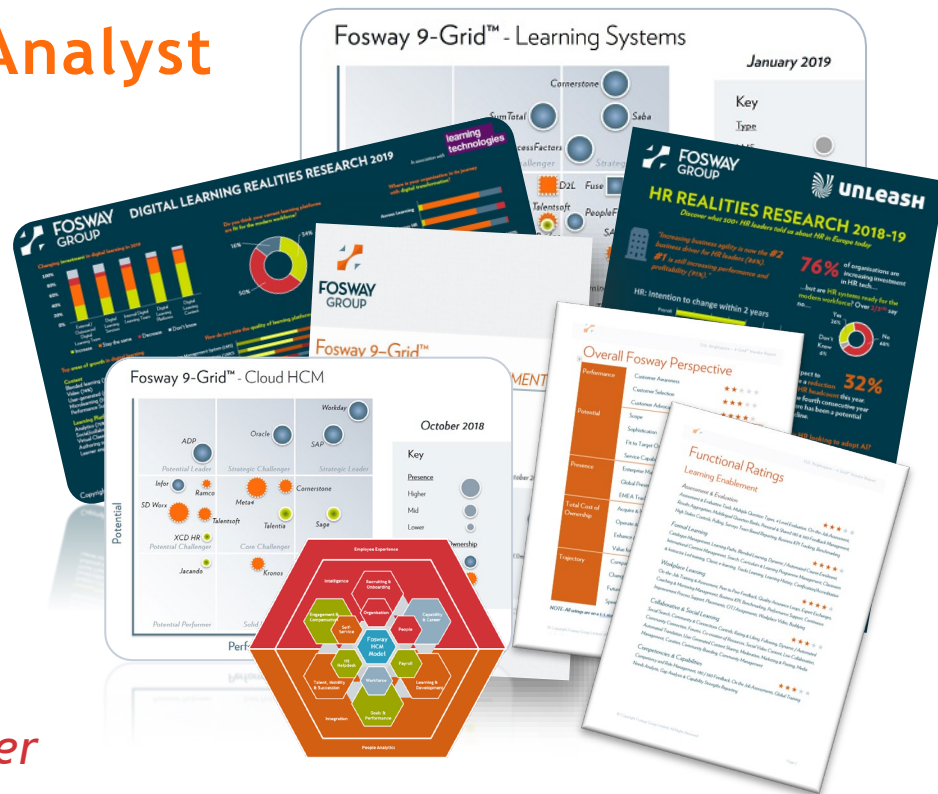
Founded 1996

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



Session overview

- ▶ Click on the ‘**chat**’ button at the bottom of your screen
- ▶ Post your **questions within the chat** - open to all
- ▶ Play nicely!

- ▶ We will start with some introductory content
- ▶ Kate will ask your questions throughout
- ▶ A recording will be made available afterwards



David Wilson
CEO



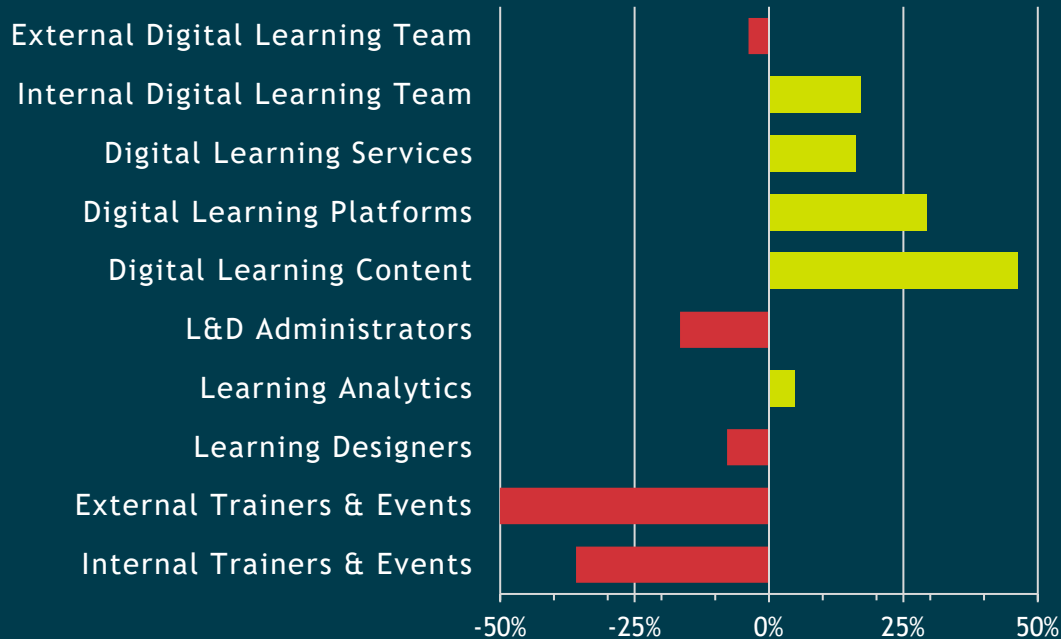
David Perring
Director of Research



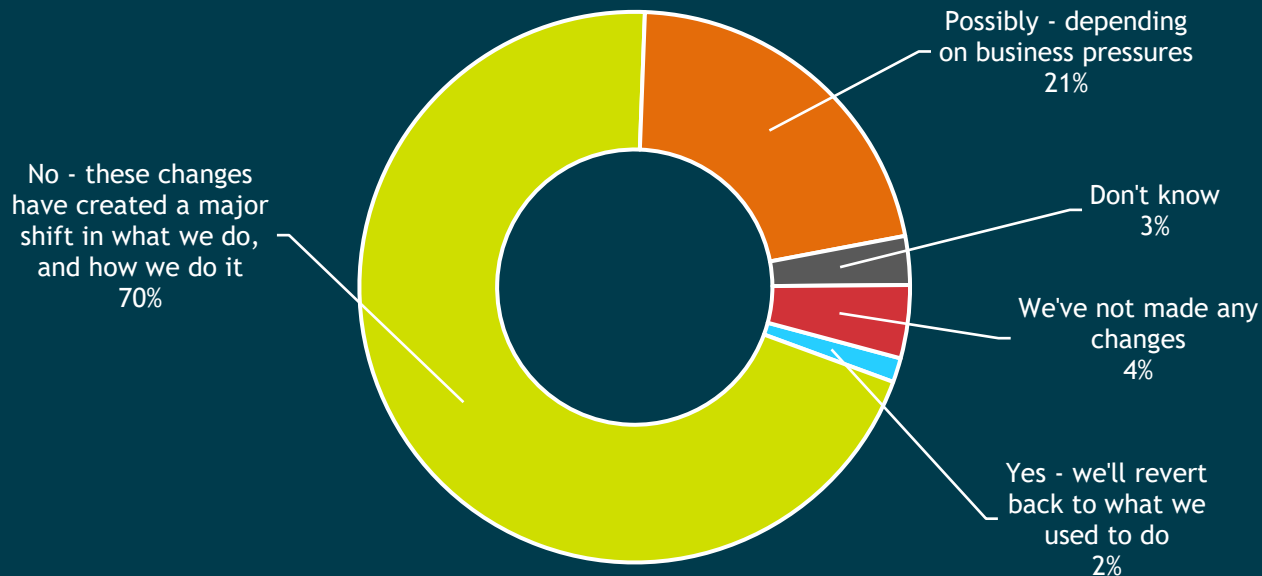
A Major Swing to Digital Learning

Spend on Digital Learning is the most resilient of all L&D expenditures. All areas of Digital Learning have been more likely to increase than decrease, led by digital learning content, except for external digital consultants, which showed a marginal decline.

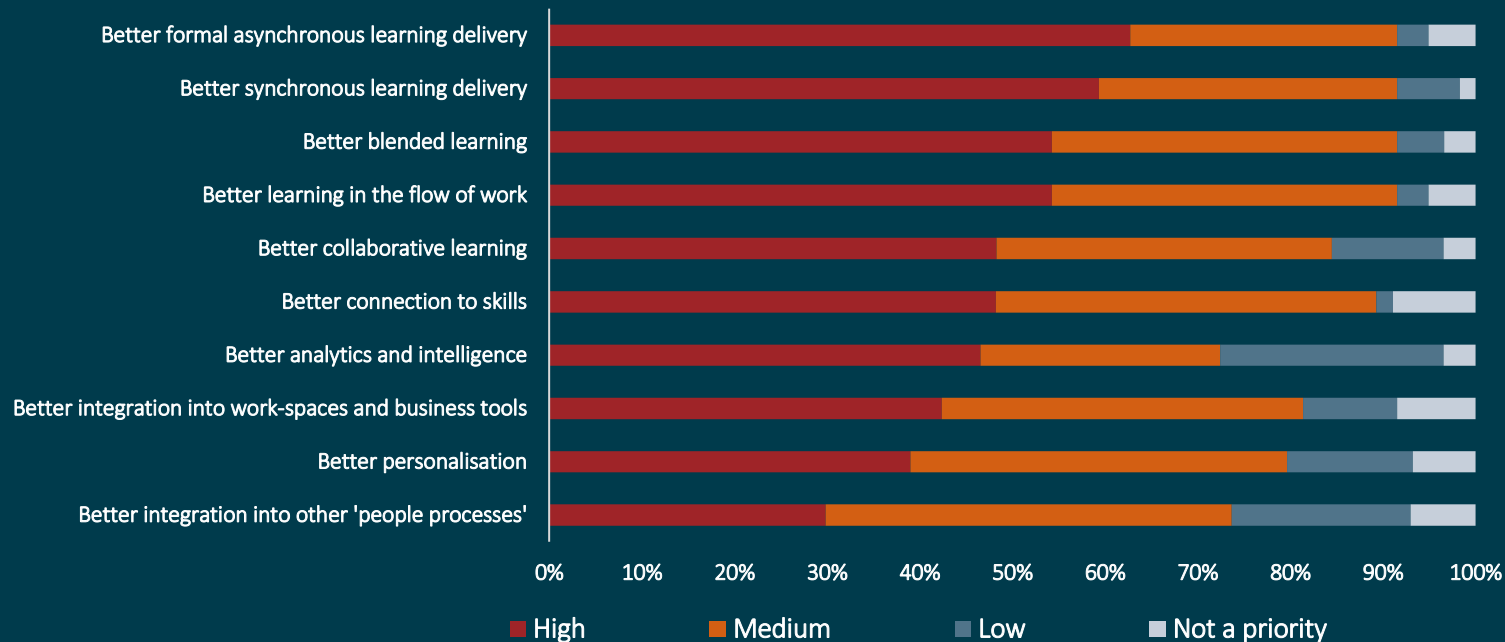
% of organisation's increasing / decreasing their L&D expenditure



Given the impact of COVID-19 over the past year, do you think your learning strategy, investment and resourcing will go back to what it was once the pandemic is over?



What are your priorities for enhancing your organisation's digital learning experiences over the coming year?



Research behind each 9-Grid™

Creating a new 9-Grid™ is normally a 3+ year process on top of pre-existing background research:

- ▶ Corporate research network members / roundtables
- ▶ Corporate enquiries and private advisory insights
- ▶ Public research process/surveys
- ▶ Structured data capture - functional and non-functional
- ▶ Independent vendor briefings/demonstrations
- ▶ Meetings at user conferences and industry events
- ▶ Formal customer reference process

9-Grid™ Inclusion Criteria

- ▶ Vendors included in the end 9-Grids are aligned to relevance to corporate buyers (EMEA HQ enterprise)
- ▶ Based on:
 1. The main vendor options in **active use** in Fosway's corporate research network
 2. The main vendor options in **active consideration**/buying process in above
 3. Innovator companies Fosway believes have the **potential to achieve** 1 or 2

*No 'pay to play' - Vendors cannot buy onto the 9-Grid™
(or decline to be included)!*

Lifting the lid ...

Is building Mastery important or is Justin Time Knowledge enough?

What is a learning experience?

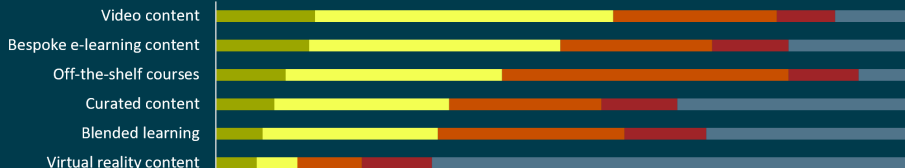


Delivering compelling Learner Experiences
Date: 23rd May 2018

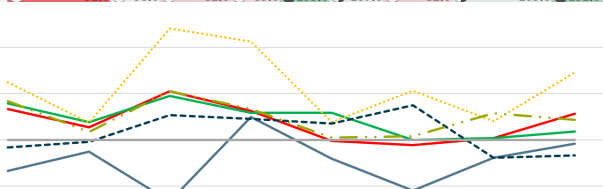
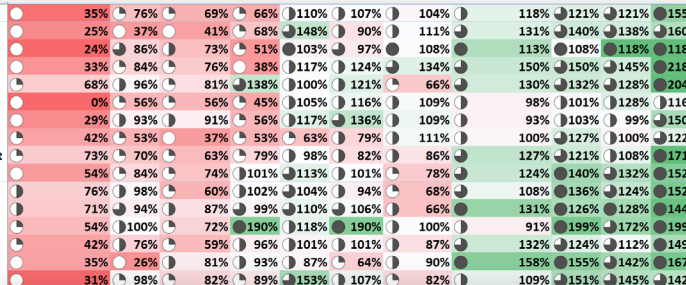
What are the challenges?

YOUR EXPERIENCE OF DIGITAL LEARNING CONTENT

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



- Learning Enablement
- Assessment, Diagnostics & Evaluation
- Formal Learning
- Workplace Learning
- Collaborative & Social Learning
- Competencies & Capabilities
- Development Planning
- Extended Enterprise
- Learning Content, Media Assets & Video Management



	Assessment & Evaluation	Formal Learning	Workplace Learning	Collaborative & Social Learning	Competencies & Capabilities	Development Planning	Extended Enterprise	Learning Content & Asset Management
1st d	153%	114%	152%	131%	99%	94%	102%	128%
2nd d	67%	87%	34%	125%	80%	45%	80%	96%
3rd d	140%	119%	147%	129%	129%	100%	102%	109%
4th d	162%	119%	220%	206%	119%	153%	120%	173%
5th d	92%	98%	127%	123%	118%	137%	80%	83%

It's a pity to assume age is a barrier to digital learning. Age is not a barrier.

Research behind each 9-Grid™

- ▶ **Primary** analysis point of view is shaped by what customers say about vendors and how they perform
- ▶ **Vendor input is secondary**, and used to cross-validate assumptions and to deepen insight re vendor strategy and their roadmap etc.

IN SUMMARY:

- ▶ We have lots of customer insight, hard data, and validated assumptions from the market!

More than a diagram ...

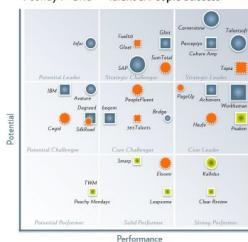


Fosway 9-Grid™ TALENT & PEOPLE SUCCESS

October 2020

Independent Analysis of the Talent & People Success Solutions Market

Fosway 9-Grid™ - Talent & People Success



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The Headlines

Market Trends

HR is rethinking its approach to talent management for all of its people. For much of the past 10 years, talent management has focused on a limited number of high potentials and the top 250 employees. But the COVID-19 crisis has made talent an enterprise wide issue. Democratising talent growth from the roots up is now key to optimising employees' value to an organisation when and where it is most needed. Bringing accelerated internal mobility, employee wellbeing, upskilling and reskilling, AI automation, and augmented self-service into the wider workforce, the goal of talent solutions now is to truly transform organisations via their success of all their people.

Traditional talent approaches are not sufficiently agile or transformational

In an environment where organisations are having to pivot who works where, doing what and when, slow HR-centric talent processes are under threat. With acquisition by flexible resourcing, succession project and gig marketplaces, personal development by employability and career bridging. These approaches aren't delivering on the promises recruitment freezes, training budget cuts. For now is the time to reflect this hence changing thinking and lifecycles, to disruptive talent solutions.

Talent management providers will

As disruptive talent agendas and the concept of the existing talent management providers have been slow to innovate. Despite a flurry of recent acquisitions by major players, they are still playing catch-up, so expect more mergers and acquisitions to come. Whether any

Solution Trends

COVID-19 has accelerated a shift in all talent processes

Enabling organisations to better engage, connect and converse, all whilst working central to HR. Against a backdrop of burnout, mental health issues, uncertain and dysfunctional team working - several foundational talent practices are showing to many organisations innovating their processes to be more agile, more democratic relationships with their people. HR and talent now have a leading role in helping

Skills are the fuel that powers organisational flexibility and as

At the heart of talent innovation is richer learning, better people insights, better greater nudging of behaviours. Skills are the anchor for upskilling and reskilling

9-Grid™ Vendor Rating

Solution	Suite or Specialist	9-Grid™ Rating
365Talents	Specialist - Skills & Internal Mobility	Core Challenger
Achievers	Specialist - Recognition & Engagement	Core Leader
Avature	Suite	Potential Challenger
beqom	Specialist - Compensation	Core Challenger
Bridge	Suite	Core Challenger
Cagid	Suite	Potential Challenger
Clear Review	Specialist - Performance M	
- an Advanced company		
Cornerstone OnDemand	Suite	
Culture Amp	Specialist - Employee Enga	
Degreed	Specialist - Skills	
Elomi	Suite	
Fuel50	Specialist - Career & Talent	
Glint	Specialist - Employee Enga	
Gloat	Specialist - Talent Marketp	
Haufe	Suite	
IBM - Watson Talent	Specialist - Intelligent Tale	

Understanding the Fosway 9-Grid™

What is the Fosway 9-Grid™

The Fosway 9-Grid™ is a five-dimensional model that can be used to understand the relative position of different solutions and providers in a selected market segment. It allows organisations to compare different solutions based on their Performance, Potential, Market Presence, Total Cost of Ownership and Future Trajectories across the market. 9-Grid™ is unique, because the model contains value in all of its zones - not just the top right. 9-Grid™ not only provides an understanding of the market, but also identifies the high-level actions that can help corporate organisations get the best from vendors.

9-Grid™ is based on Fosway Group's independent research in the 124+ years and draws upon the insights and experience of our Corporate Research Network is a group of HR, talent and learning profession of Europe's leading companies. These companies are typically global Head Offices in Europe (or the EMEA HQ of global companies).

Essentially the 9-Grid™ Model brings together our independent view

Performance - comprising of two elements: Market Performance &

Potential - Scope, capability and sophistication.

Traditional Talent Foundations	New Talent & People Success Differentiators
Workforce Planning	Agile Talent Allocation
Talent Acquisition	Flexible Resourcing
Succession Planning	Opportunity Marketplace
Internal Job Boards	Project & Gig Marketplace
Roles and Responsibilities	Outcomes, Skills & Projects
Performance Management	Getting Work Done: Teaming, Feedback, & OKRs
Appraisal	Continuous Mentoring
Training	Learning through Work
	Pre-Boarding & New Worker Acceleration
	Reskilling & Upskilling
	Employee / Worker Relationship (Intelligence + Action)
	Employability & Career Bridging
	Flexible Working / Incentives, Recognition & Rewards
	Resilience, Sustainability, Wellbeing & Wellbeing
	Organisational Fluidity, Teaming & Agility
	Purpose, Belonging & Advocacy

The 9-Grid™ variables for Talent & People Success

What do potential, performance, presence and total cost of ownership mean in the context of talent and people success?

Performance

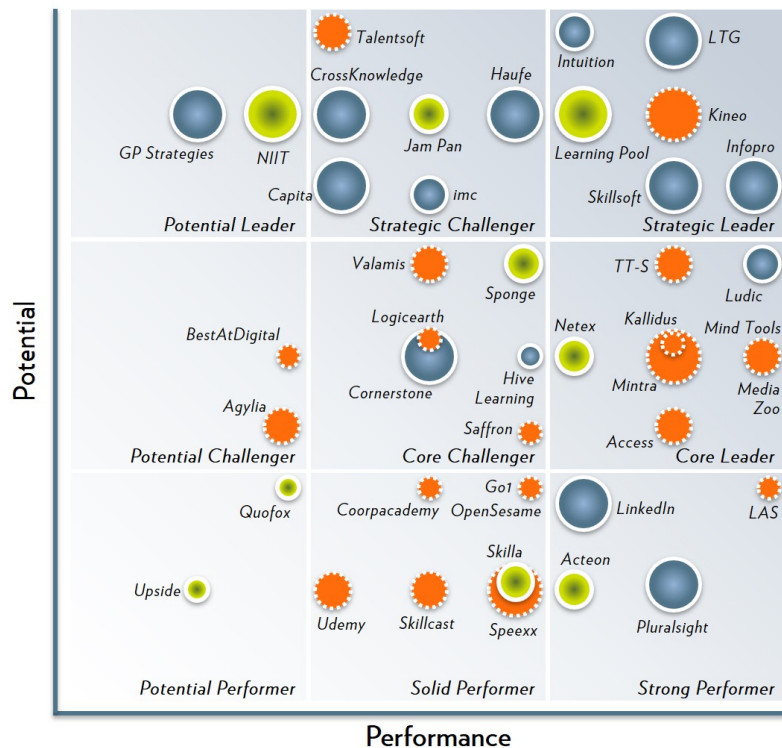
This focuses on customers' choices: does the solution get short-listed, does it win, does it deliver and are customers happy. This is viewed through the lens of large international corporates and is taken from the

We always recommend you download and read the full reports

Digital Learning vs Learning Systems 9-Grids™: What's the difference?

- ▶ **Digital learning** is about the ability to be a complete digital learning partner: service, content, platforms, operations, transformation
- ▶ **Learning systems** focuses on the learning software platforms that power the learning process, content and delivery of the transformation

Fosway 9-Grid™ - Digital Learning



March 2021

Key

Presence

Higher

Mid

Lower

Total Cost of Ownership

Higher

Mid

Lower

We are all digital learning providers now!

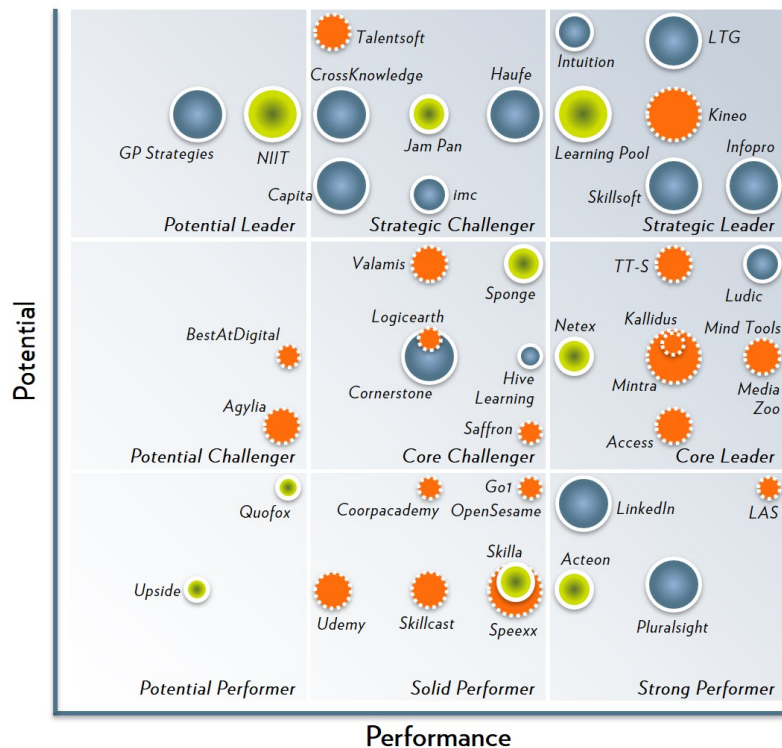
Pivotal role post-COVID-19

Beyond the lowest common denominator: make digital learning more human

Fatigue is forcing buyers to invest in better experiences

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Fosway 9-Grid™ - Digital Learning



March 2021

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Ask the Analyst ...

So what
would
YOU like
to know?

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And Remember ...

- ▶ The 9-Grid™ is just the tip of the analysis iceberg!!
- ▶ Fosway's corporate engagement process can provide you with supporting decision tools as well as access to detailed analyst insights

Why start your procurement process from scratch when Fosway already has the research and insight to help you make better supplier decisions much faster?

LATEST FOSWAY RESEARCH

Get involved:

- ▶ Read the full report: 9-Grid™ for Learning Systems
<https://www.fosway.com/9-grid/digital-learning/>
- ▶ Input to our 2021 Digital Learning Realities Research
<https://www.research.net/r/GFJWB2>



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