



in association with

learning
technologies

The Learning Technology Landscape

T2S2

What you REALLY need to know...

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Founded 1996

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

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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

40% Respondents from Organisations > 5000 Employees

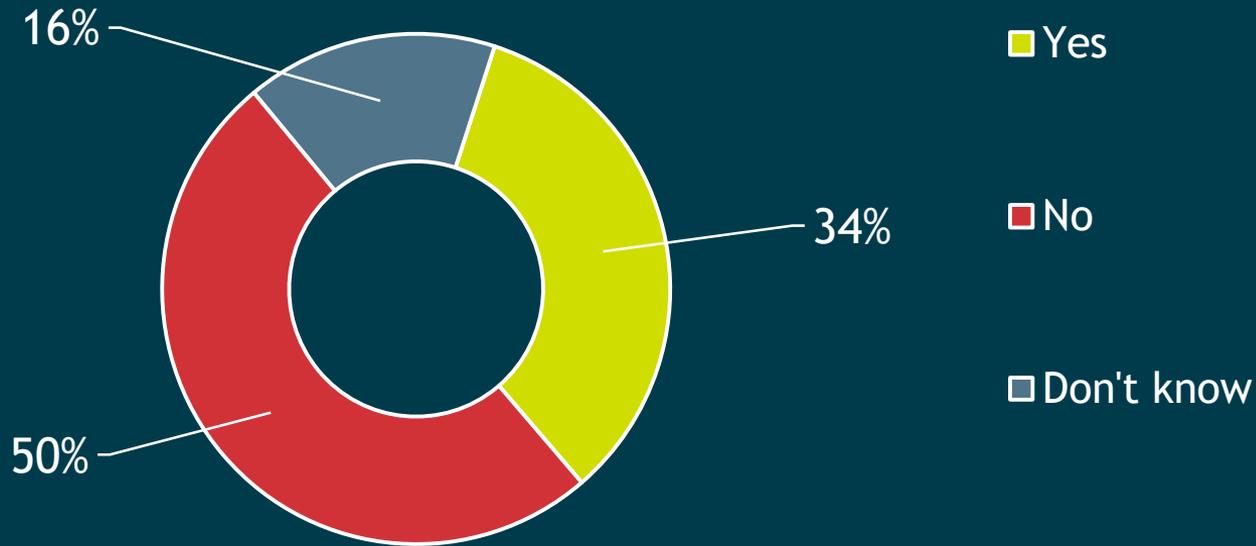


88% of respondents **European** (11% APAC)

65% Respondents from Organisations > 1000 Employees

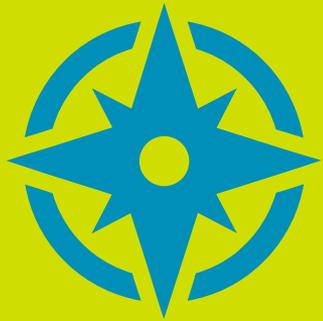
Approx. 800 survey respondents so far

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



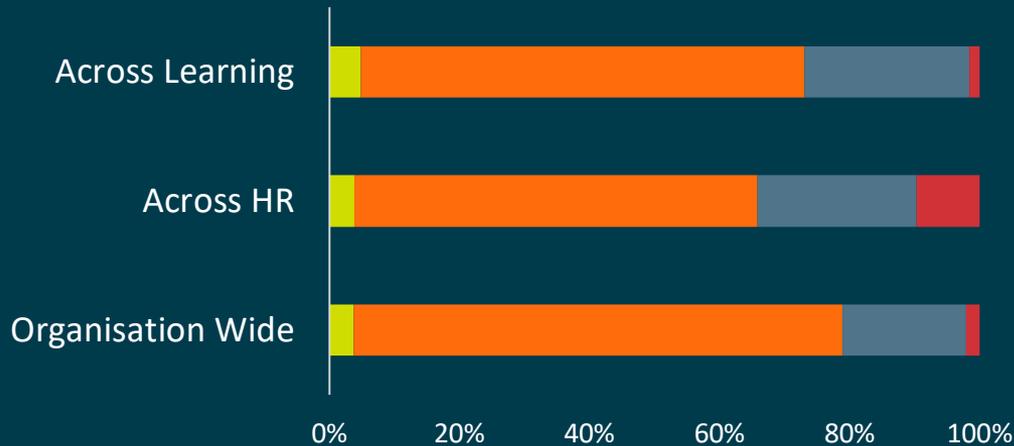
What makes Learning Technology fit for the future?

- ▶ 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?

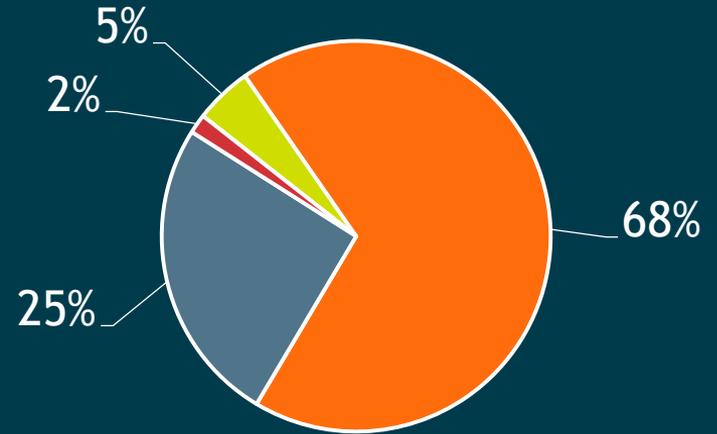


Your Experience of Digital Learning

Where is your organisation in its journey with digital transformation?



Across Learning

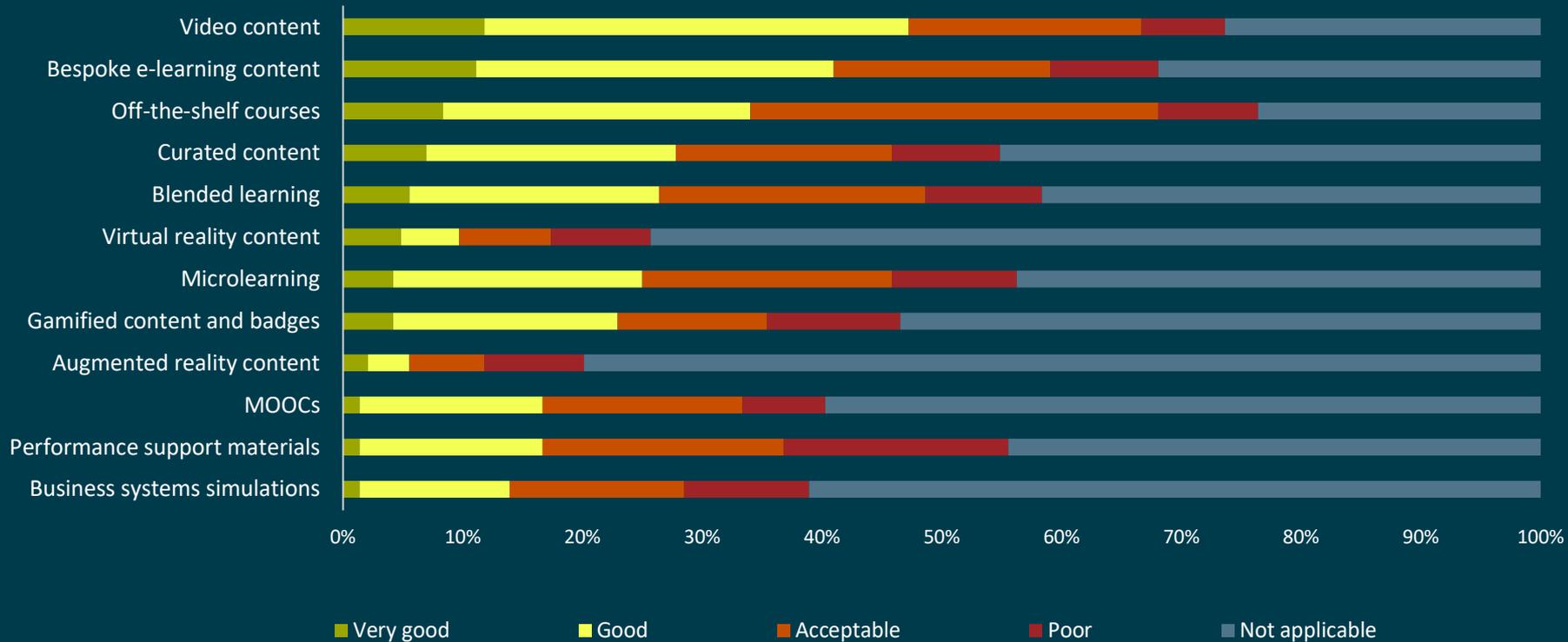


■ Completed
 ■ In progress
 ■ Planning
 ■ Not applicable

■ Completed
 ■ In progress
 ■ Planning
 ■ Not applicable

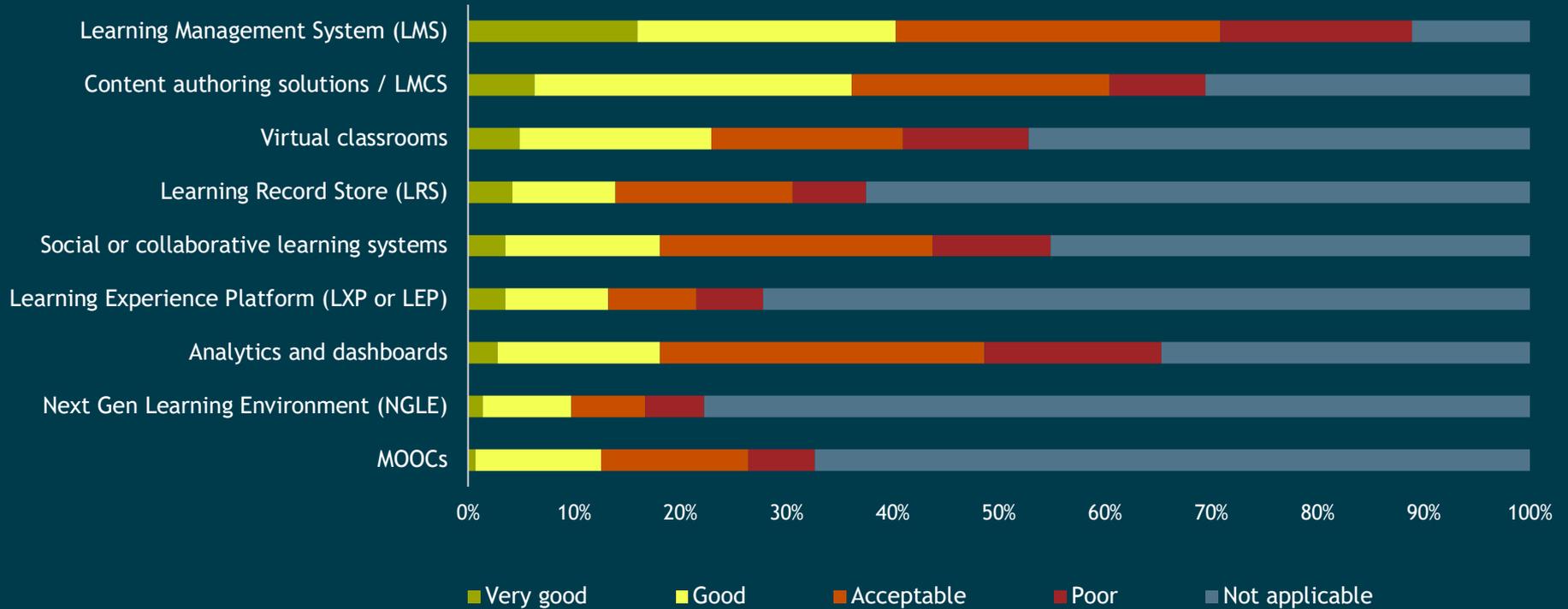
YOUR EXPERIENCE OF DIGITAL LEARNING CONTENT

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



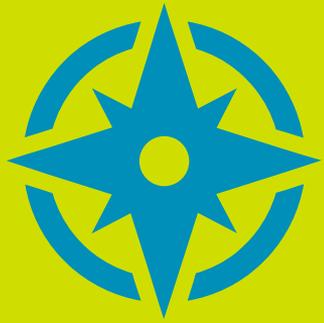
YOUR EXPERIENCE OF DIGITAL LEARNING PLATFORMS

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?

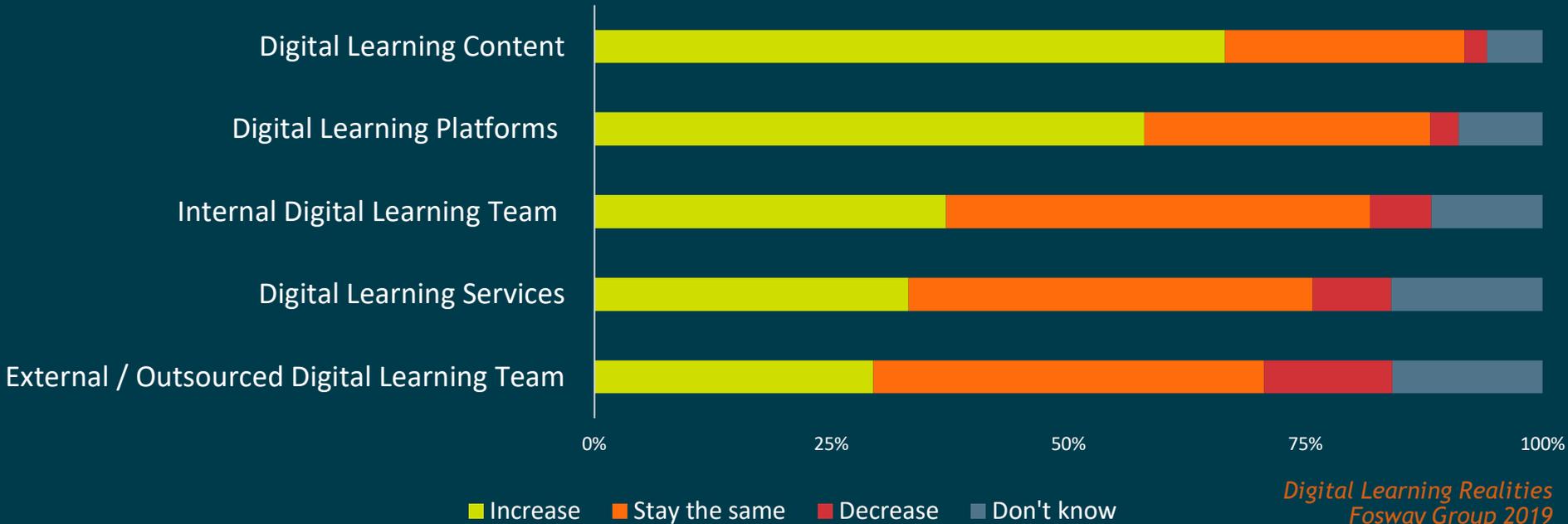


Building Your Digital Learning Ecosystem

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%)

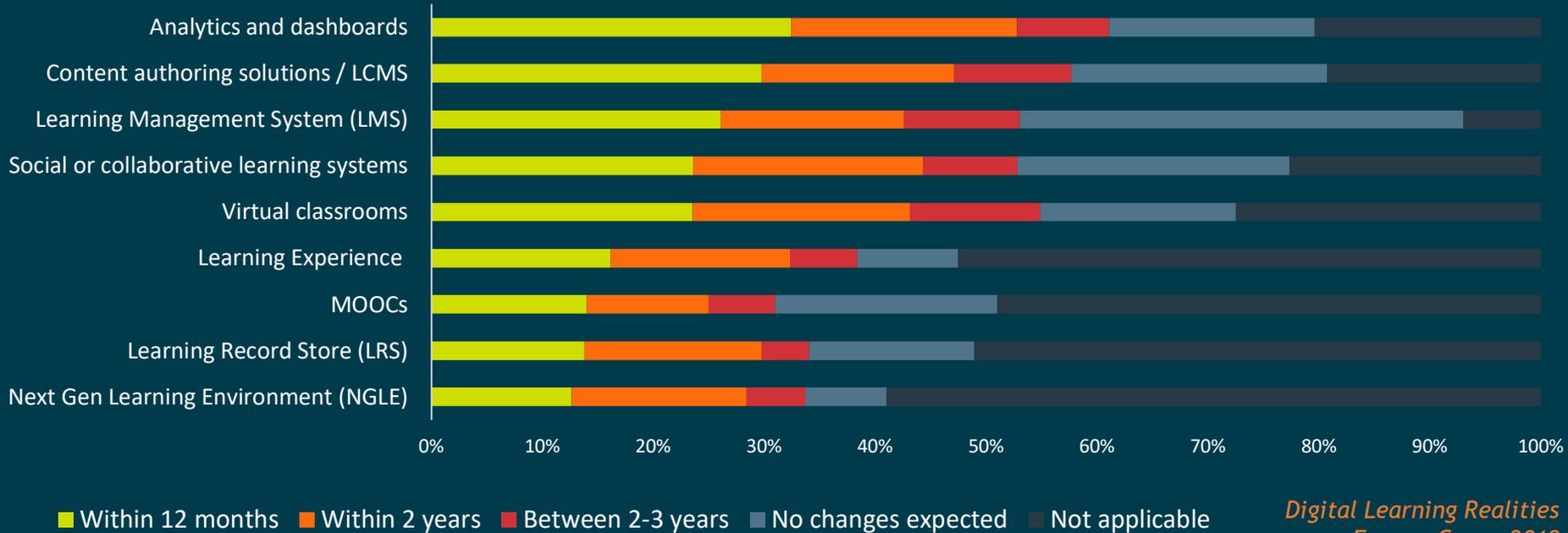
Learning Platforms

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?



*Digital Learning Realities
Fosway Group 2019*

Learning Investment

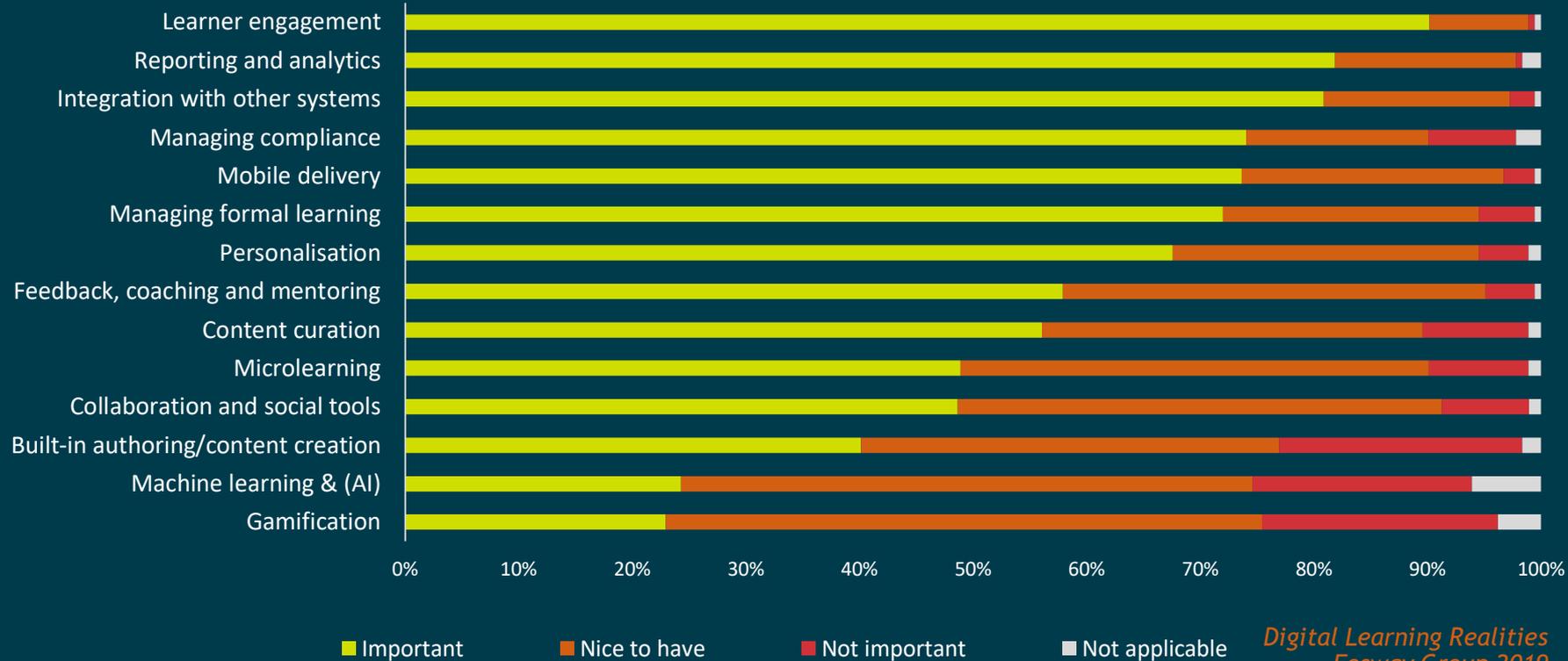
- ▶ How do you make sure you are investing the right amount in the right areas for your business?
- ▶ What is your best fit, and why?
- ▶ Do you understand your case for change?

What digital learning approaches are your highest priority for improvement?



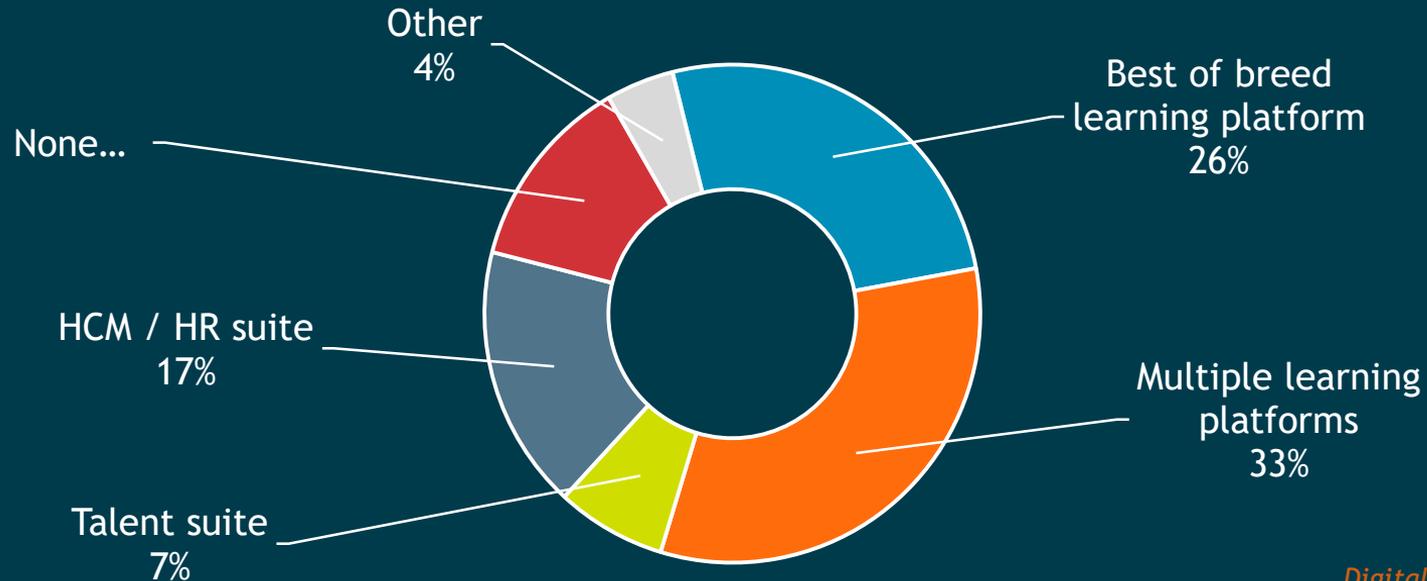
*Digital Learning Realities
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How important are the following platform features to improving your digital learning approach?



*Digital Learning Realities
Fosway Group 2019*

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



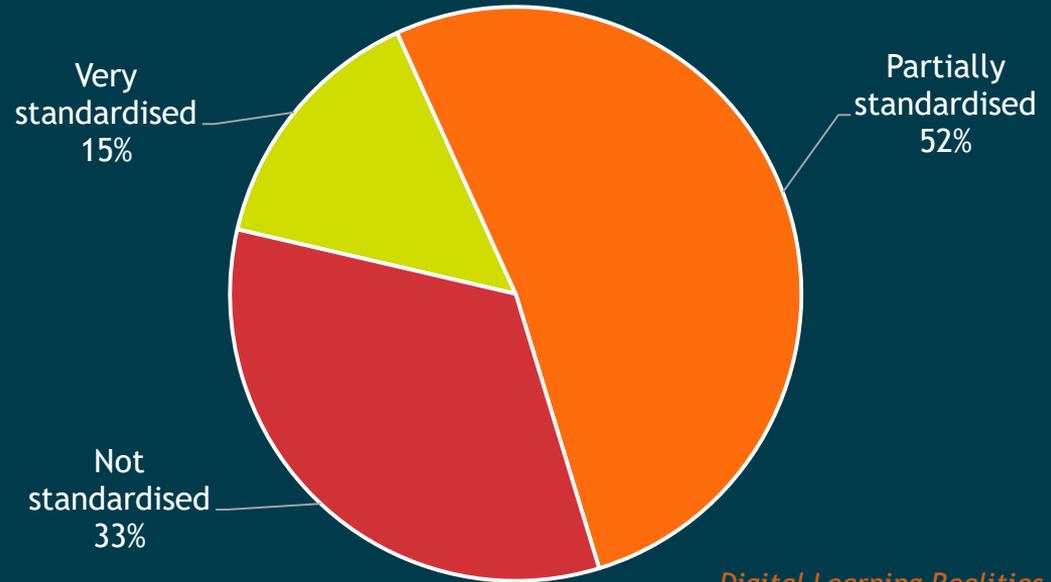
*Digital Learning Realities
Fosway Group 2019*



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*

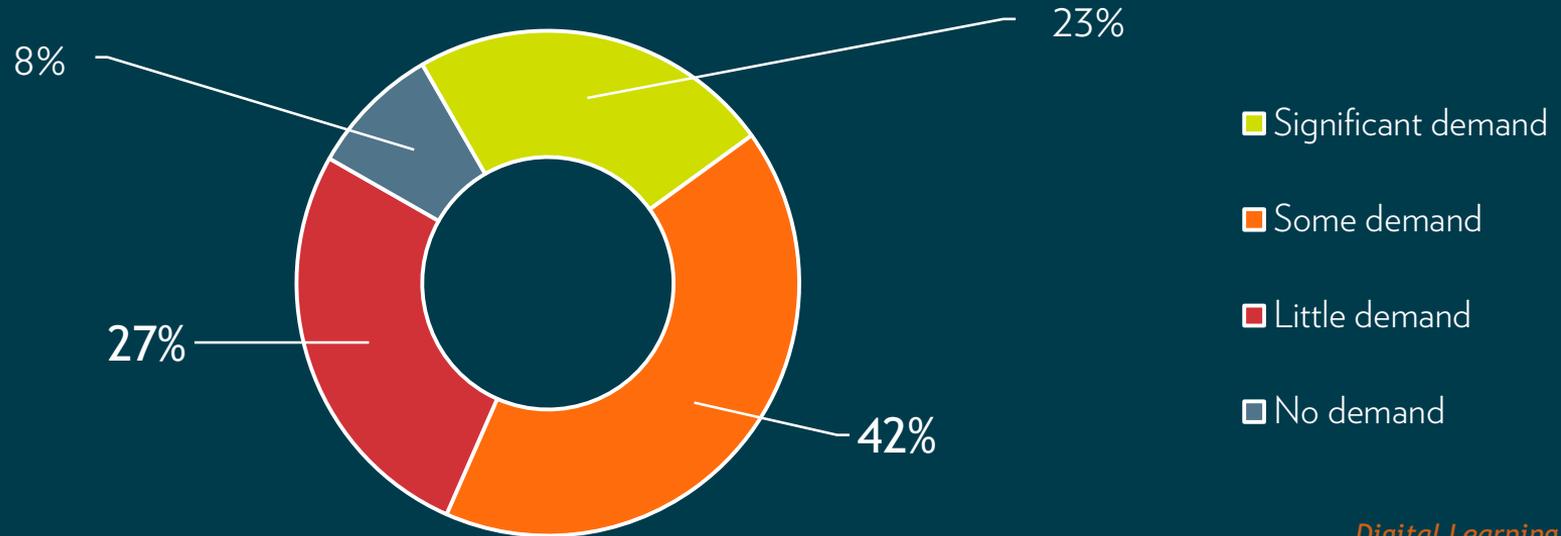
How are your solutions changing and what is driving that change?

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



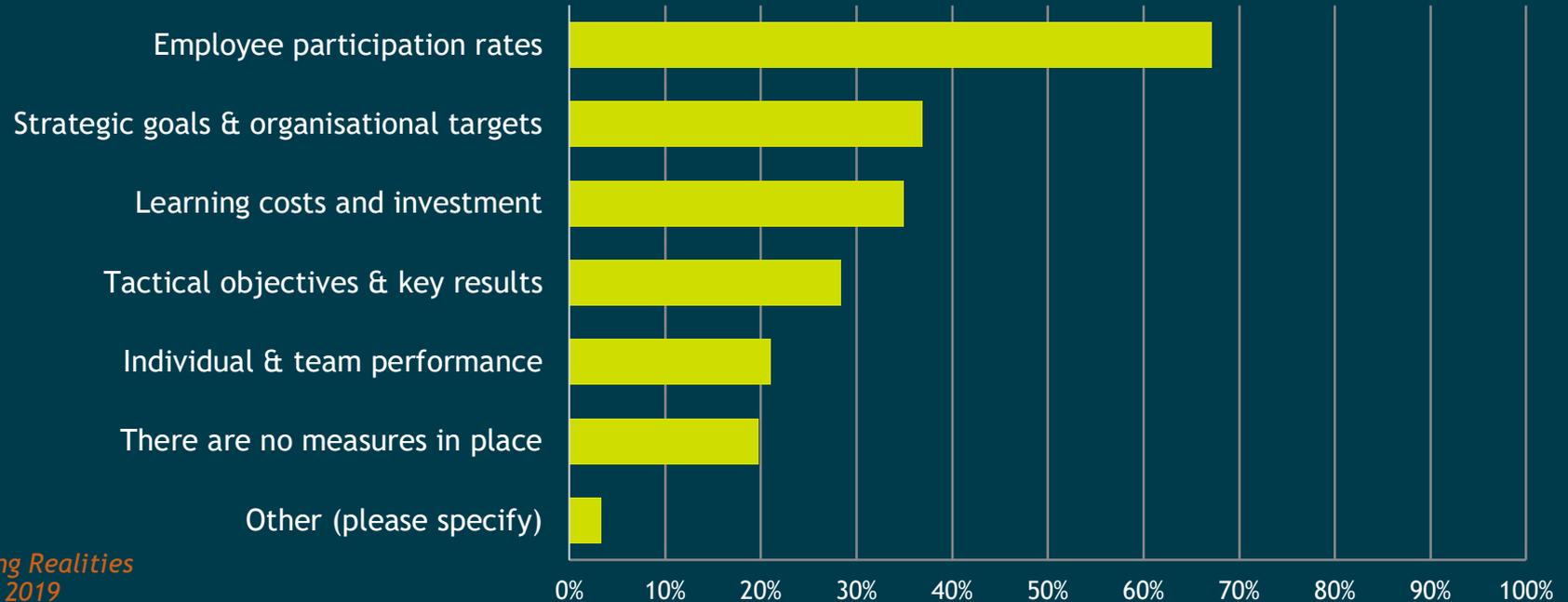
Are you really
making an impact?

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

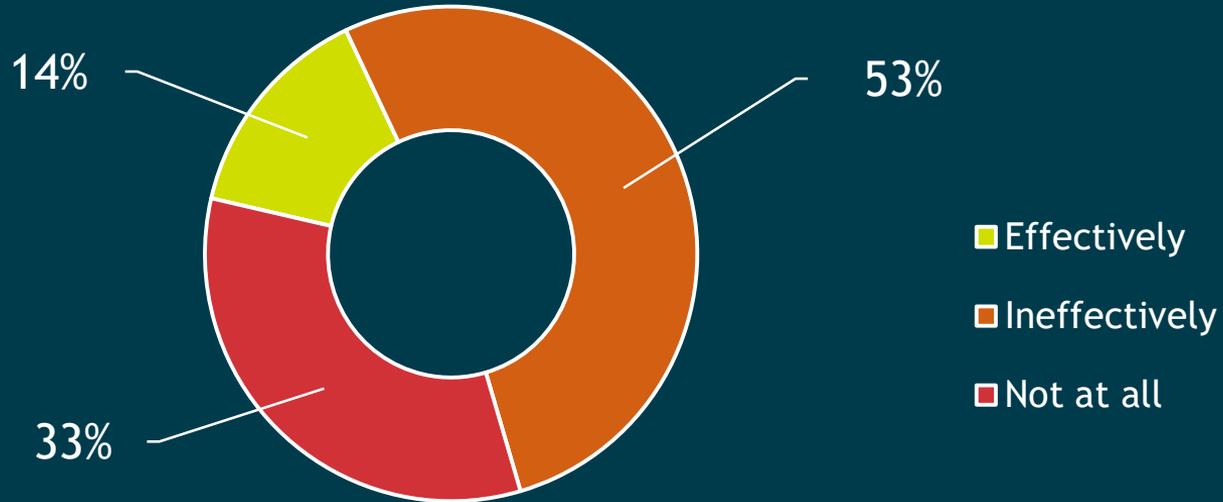


*Digital Learning Realities
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What measures do you use to provide the impact and value of digital learning in your organisation?



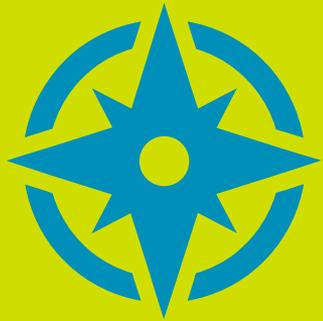
How effectively does your organisation measure the impact of digital learning today?



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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

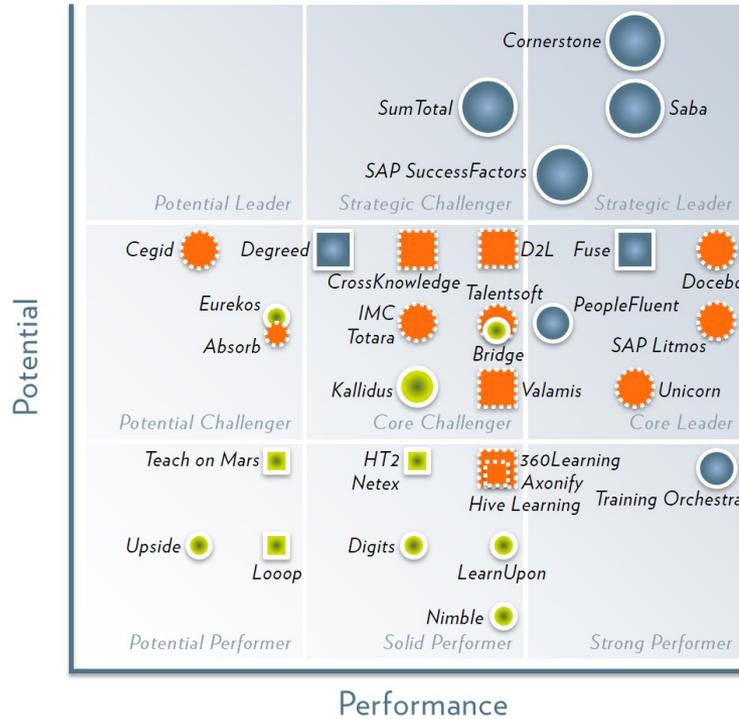
▶ **User Experience**
- **69 factors**

- 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

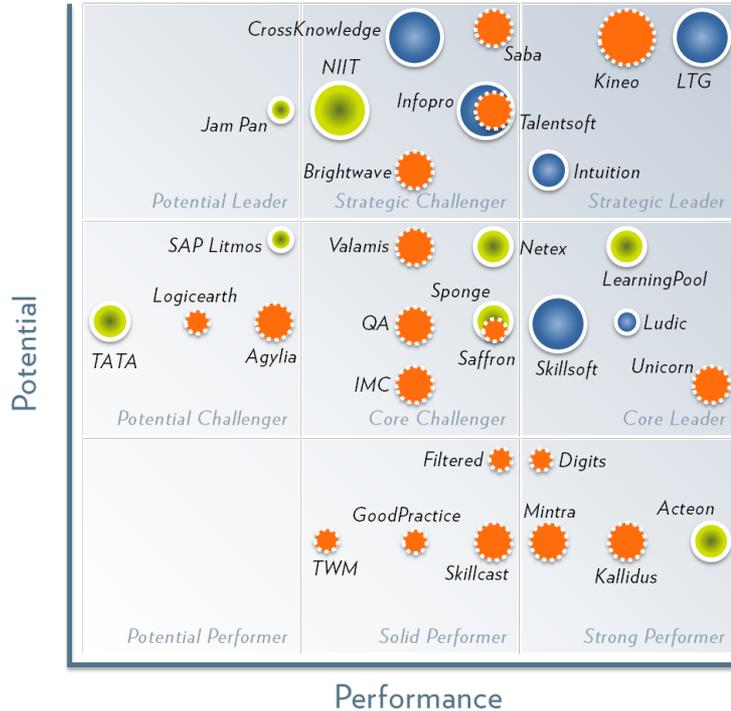
Higher

Mid

Lower

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Fosway 9-Grid™ - Digital Learning



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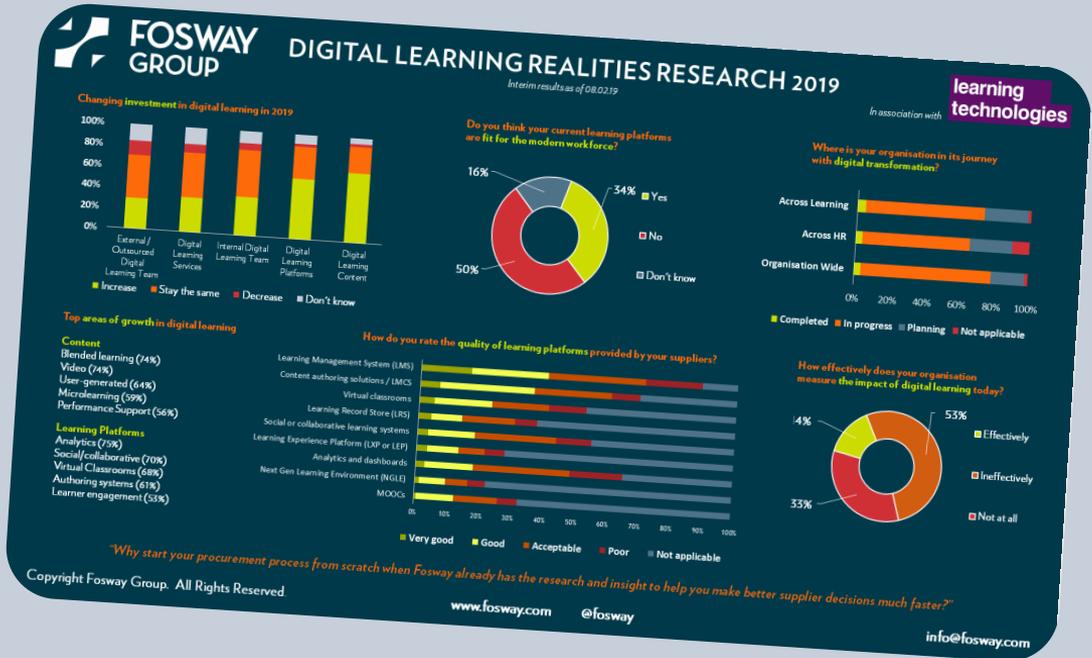
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Who are your digital learning / learning tech suppliers, and are they fit YOUR future?

- ▶ 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



* Interim results as of 1st February 2019

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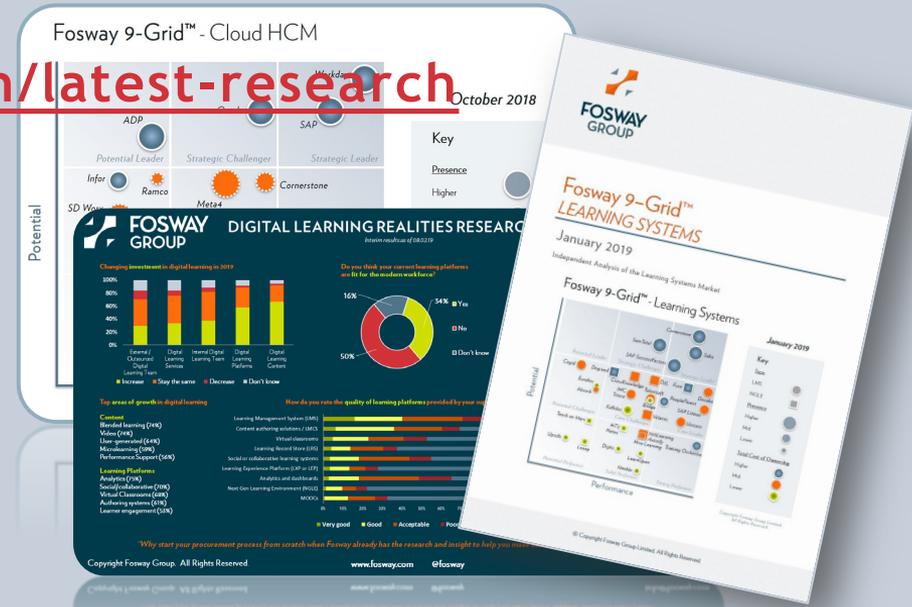
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