



# Learning Tech Trends

*Get Ready for Disruption*



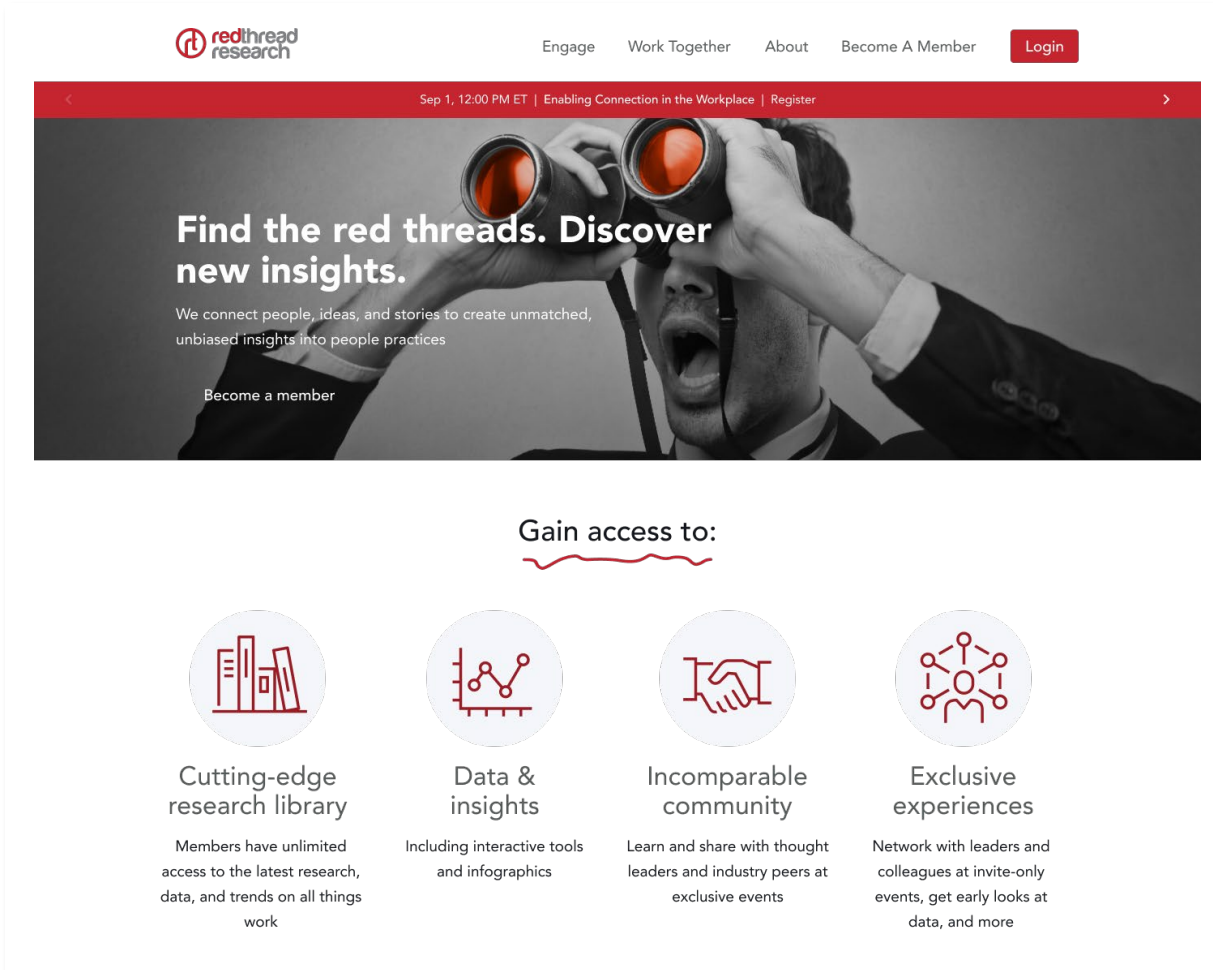
Dani Johnson

*Cofounder & Principal Analyst*

*RedThread Research*



www.redthreadresearch.com



## How we help:

- Membership
- Research
- Education

## What we do:

We're a human capital research and advisory firm focused on the practices and technologies of:

- Learning & Skills
- Performance
- HR Tech
- Diversity, Inclusion, Equity, & Belonging
- People Analytics



# Thank you to the Tech Consortium

Augmentir

Axonify™

betterworks

Claro  
A WillisTOWERSWATKINS Company

cornerstone

crunchr

degreed

eightfold.ai

Lightcast

Medallia

NovoEd

Perceptyx

Quantum  
Workplace

Reejig

seekout>

splashBI®

skilable

TECHWOLF

top  
EMPLOYERS  
INSTITUTE

Torch

visier®

workday®



This decade, so far, has been a *shakubuku*:

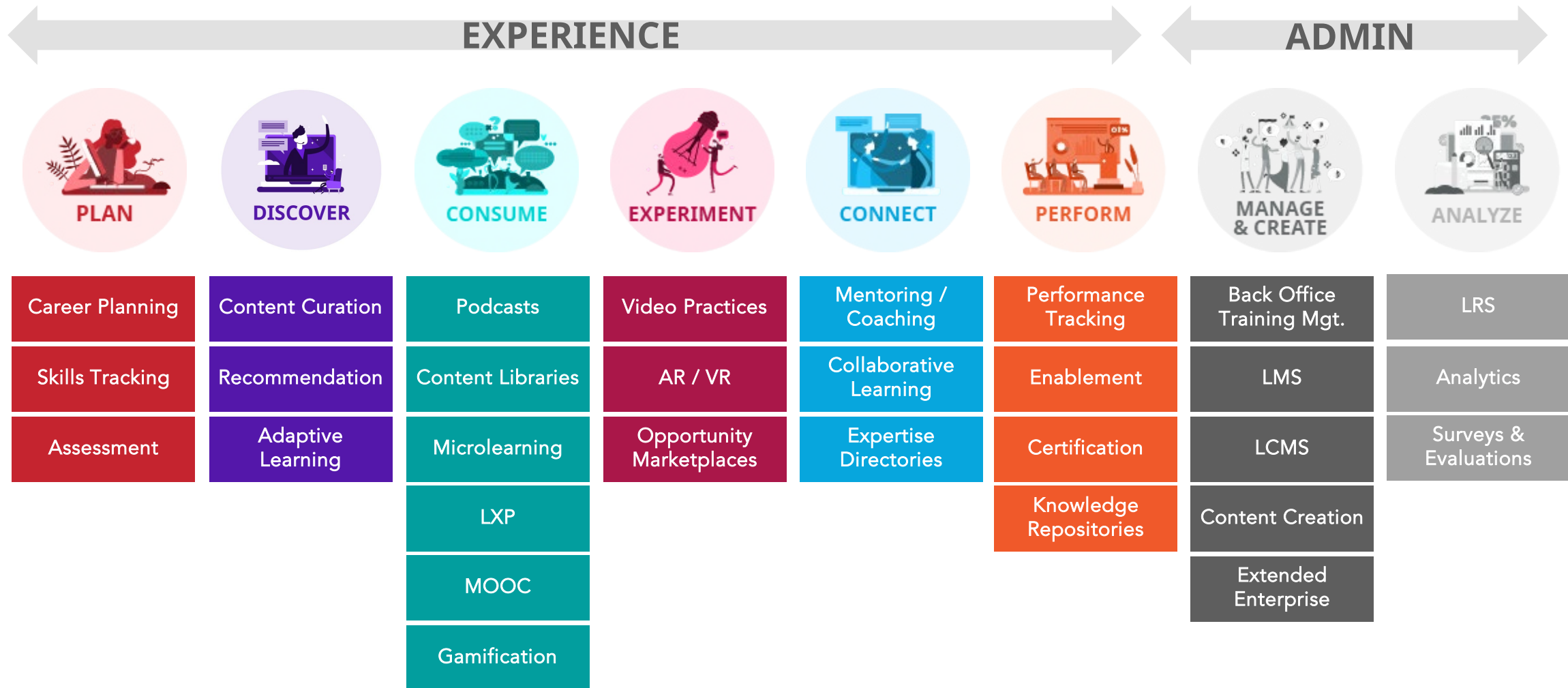
“A swift, spiritual kick to the head that  
alters your reality forever”

- *Gross Pointe Blank, Buena Vista Pictures, 1997*

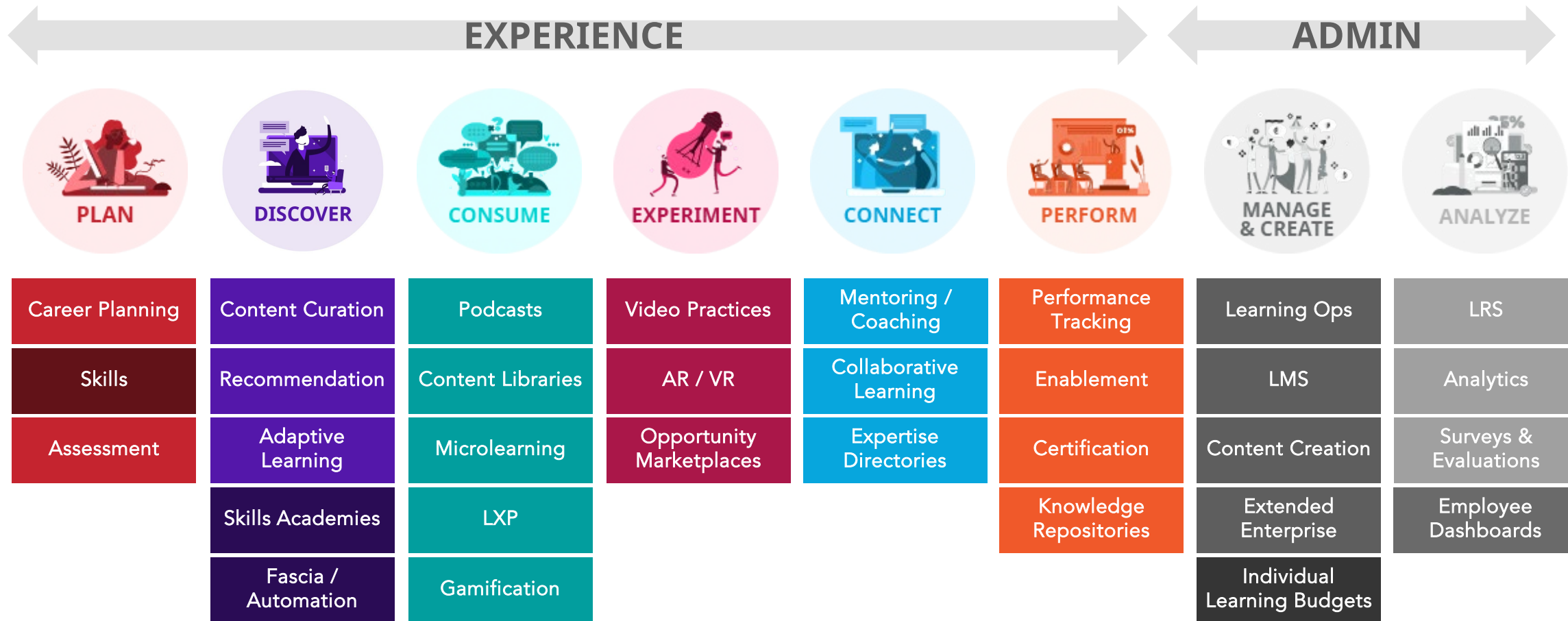




# 2021 learning tech functionalities



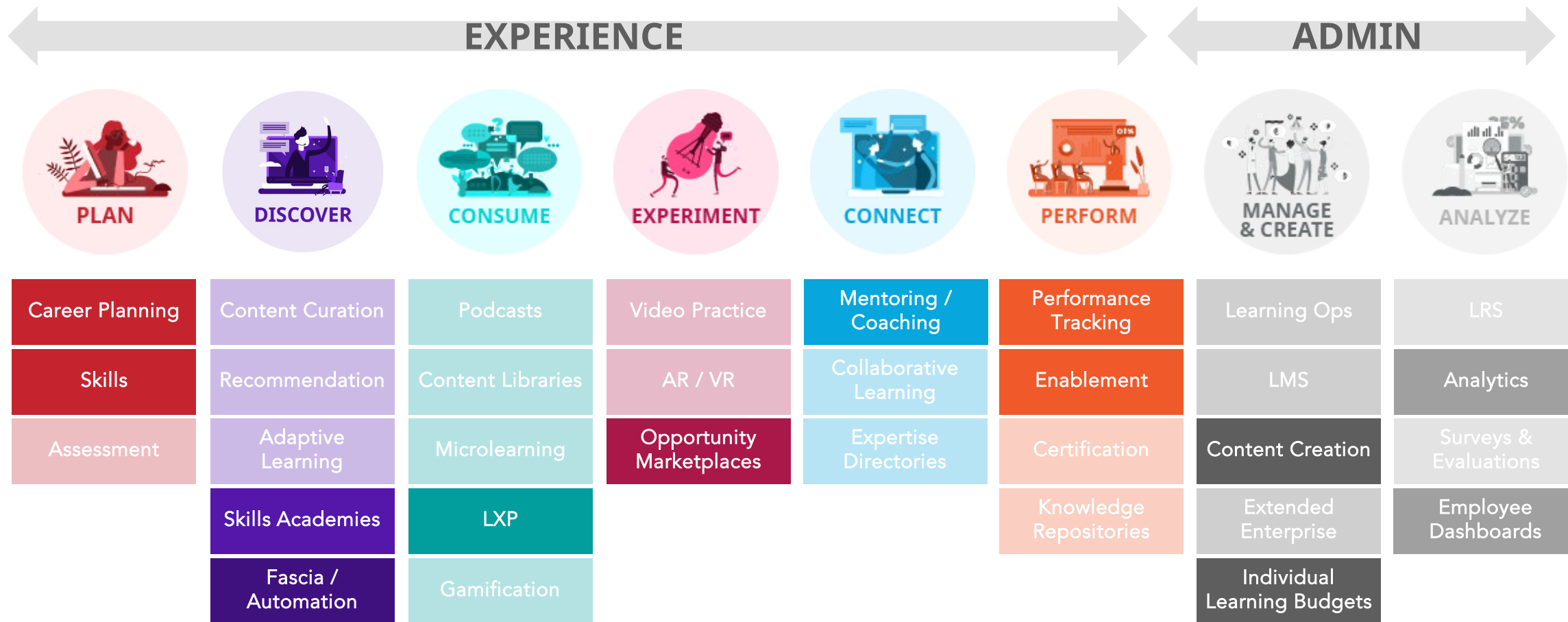
# 2023 learning tech functionalities



Generative AI



# Hot or not?



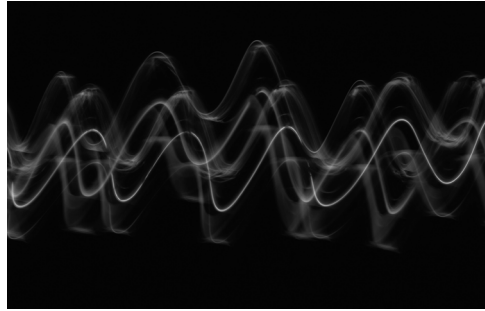
Generative AI



# The learning tech market is enabling...



Skills & mobility for learning



A signal through the noise



Connecting of humans



Freedom to develop



More with Less?



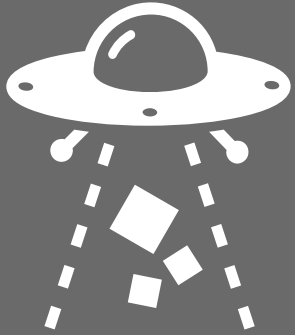


# Skills & mobility

*Learning tech market is responding by...*



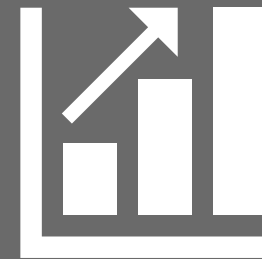
# Skills tech



Collects information  
about employee skills



Organizes  
skills data



Provides info about  
skills in the labor market



Makes it easier to use  
employee skills data



# What skills tech does

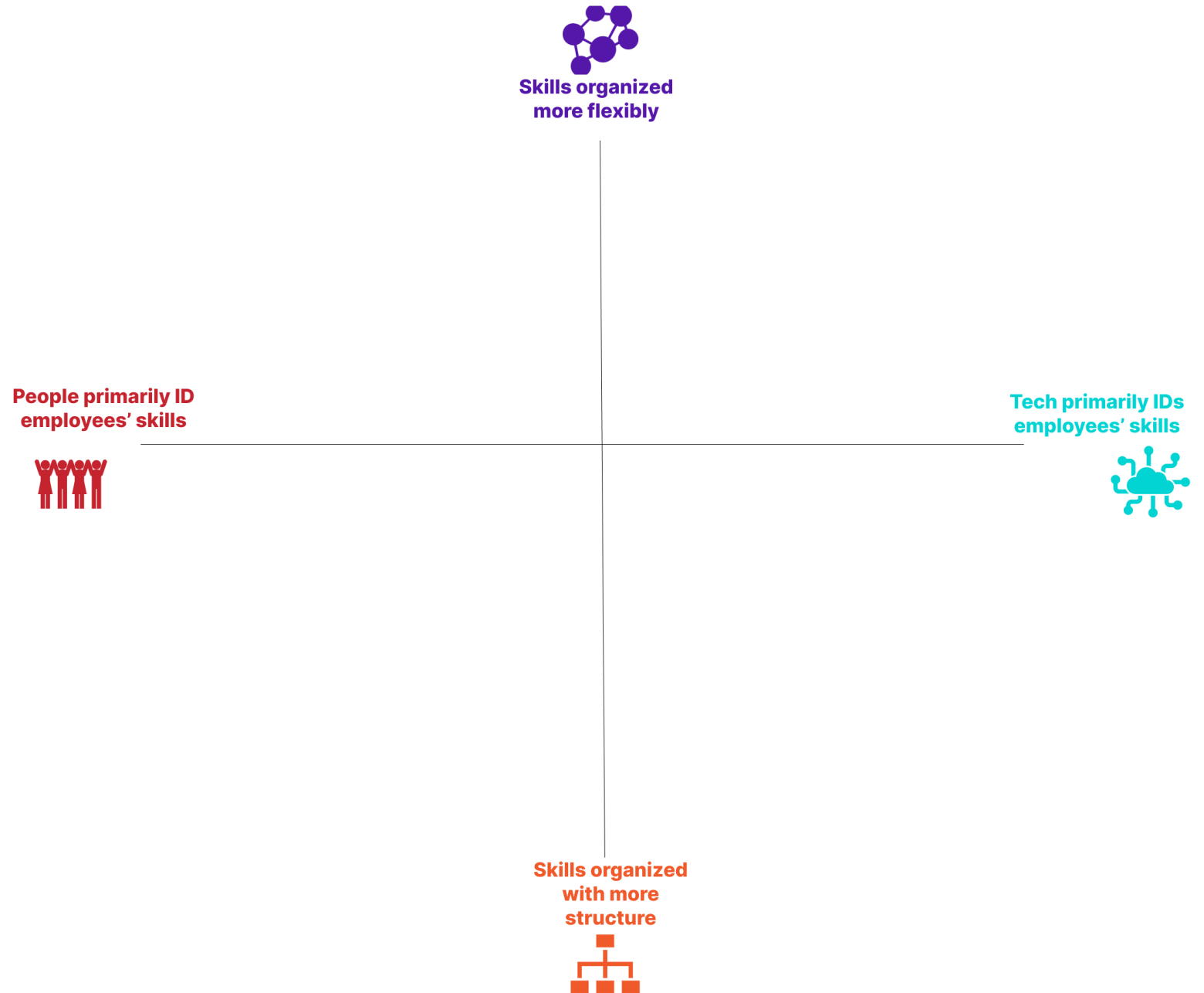
The most common functionalities offered by Skills tech today



# Skills tech

**55 Vendors** in this study organized along 2 dimensions:

1. How skills are identified
2. How skills are organized

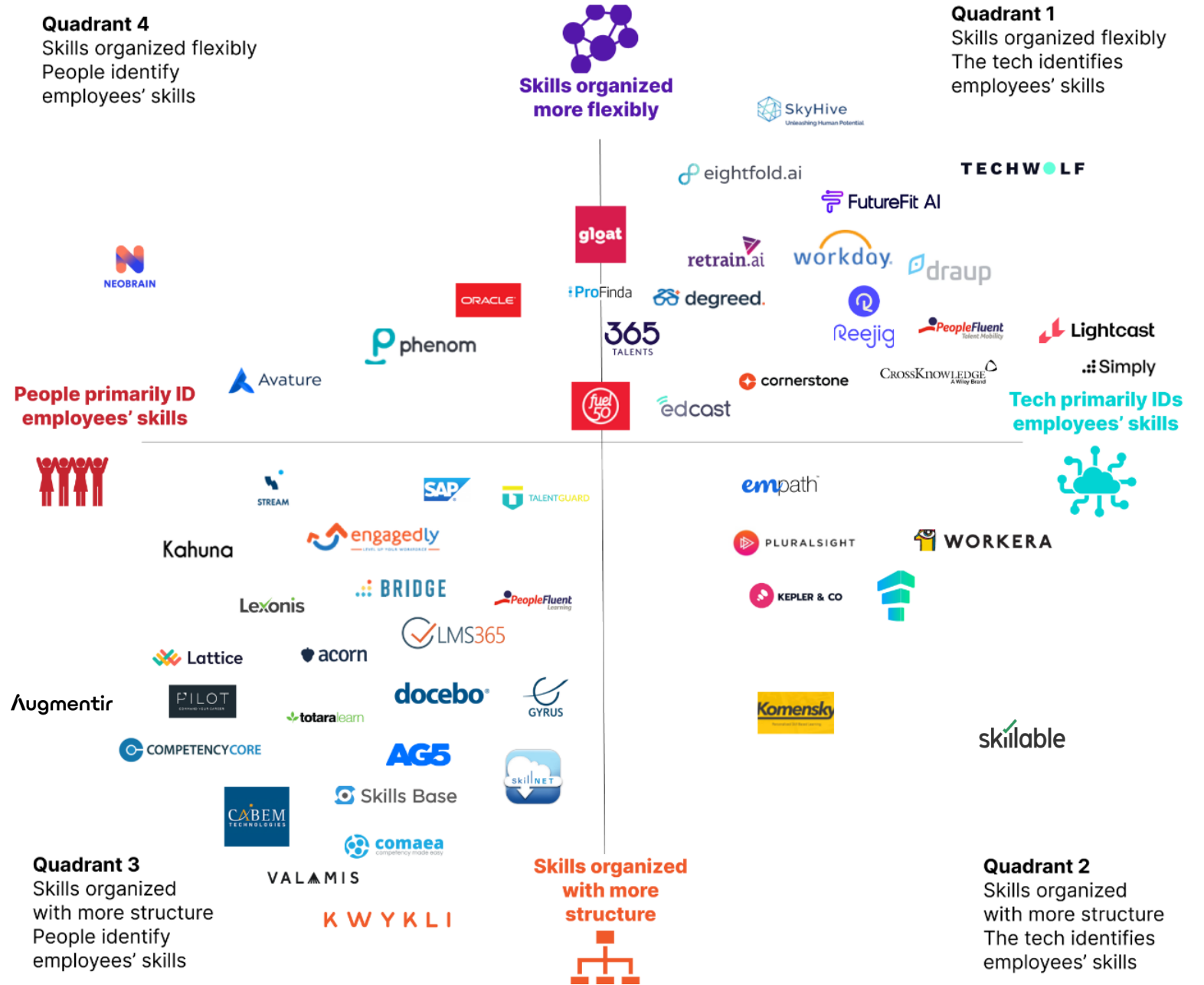




# Skills tech

55 Vendors in this study organized along 2 dimensions:

1. How skills are identified
2. How skills are organized



# Skills at an org level

**Lightcast** Role Mapping Skill ID Settings

**Project Business Analyst Associate Skill Profile** Last Updated: 01-09-2022 [View Log](#) [Edit Role](#) 0 Selected

Code: 22200 Family: Business / Administration Function: Analysis Lightcast Title: Communications Director Occupation: Management Analysts Reviewed

<input type="checkbox"/> Skill Name	Type	Category	Subcategory	% in Our Postings	Prof
<input type="checkbox"/> Accountability	Common Skill	Physical and Inherent Abilities	Initiative and Leadership	85%	Pr
<input type="checkbox"/> Data Analysis	Specialized Skill	Analysis	Data Analysis	25%	Re
<input type="checkbox"/> Budgeting	Common Skill	Finance	Budget Management	28%	Pr
<input type="checkbox"/> Business Process	Specialized Skill	Business	Business Operations	33%	Pr
<input type="checkbox"/> Strategic Planning	Specialized Skill	Business	Business Strategy	30%	Re
<input type="checkbox"/> Public Relations	Specialized Skill	Marketing and Public Relations	Public Relations	85%	Pr
<input type="checkbox"/> Crisis Communications	Specialized Skill	Business	Business Communications	21%	Pr
<input type="checkbox"/> Marketing	Specialized Skill	Marketing and Public Relations	Marketing Strategy	28%	Pr
<input type="checkbox"/> Operations	Common Skill	Business	Business Operations	31%	Pr

COMPANY NAME Dashboard Analytics Search skills or jobs AW

Skills Jobs Employees Planning Usage

Santone Country Location Job Category Job Level 1 year

**Close Match Jobs** >80% Export

**Average # of Skills** In-Demand Skills Only Export

**Employee Velocity** Export

**Match to Current Role** Export

**In-Demand Skills for Job Movement** Upward Job Movement Adjacent Job Movement Export



# Opportunity marketplaces

## Marketplaces :

- Provide learning in the flow of work
- Create data more quickly
- Engage employees to explore
- Give organization information about employee skills
- Personalized development paths for building skills for specific roles



# Gigs and jobs

**Fuel50**

**OPPORTUNITIES PICKED FOR YOU**

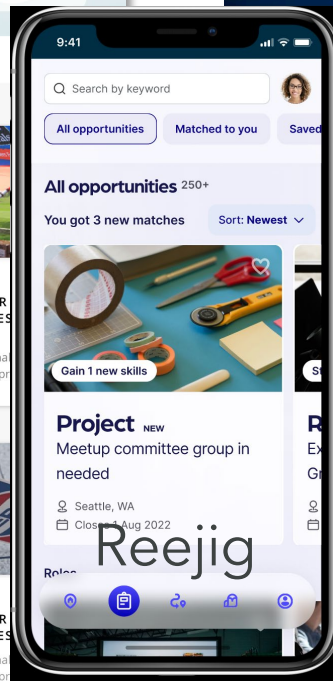
**Jess**  
Your profile is looking awesome  
[Give it some more love](#)

VACANCIES MENTORS **GIGS** JOURNEYS LEARN

**Find a gig that matches the skills you want to improve.**  
[See all gigs](#)

- TEAM SUPPORT**  
Our football team needs a small crew to giveaway hydration for the upcoming game. As a great way to engage in the process and encourage the team through...  
[You got this](#)
- STRETCH ASSIGNMENT FOR THE SPRING SALES STRETCH**  
Relaunching an internal initiative. As you engage in the process...
- STRETCH ASSIGNMENT**  
Relaunching an internal initiative. As you engage in the process...  
[Applied](#)
- STRETCH ASSIGNMENT FOR THE SPRING SALES**  
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Fuel50



**Explore Internal Opportunities**  
[View all](#)

**Plan your career**  
[View all](#)

**Configure Opportunity Alerts**  
[View all](#)

**Recommended opportunities for you** [View all](#)  
Based on your skills and areas of interest.

STRONG MATCH	STRONG MATCH	GOOD MATCH	GOOD MATCH
Ref # 32455 <b>Content Marketing Manager</b> Job Area: Marketing Posted: 5/11/2021 <a href="#">View</a>	Ref # 94876 <b>Regional Marketing Coordinator</b> Job Area: Marketing Posted: 28/10/2021 <a href="#">View</a>	Ref # 47258 <b>Redefining Digital Customer Journey</b> Project Area: Marketing Posted: 28/10/2021 <a href="#">View</a>	Ref # 93704 <b>Boston Career Fair</b> Project Area: Talent Acquisition Posted: 28/10/2021 <a href="#">View</a>

**Featured Project of the month**  
**Boston Career Fair**  
As part of our Talent Acquisition strategic plan, Voutique will be attending this year to the latest edition of Boston Career Fair.  
[See opportunity](#)

Aventure





The background features a series of white, glowing, wavy lines that resemble a signal or data visualization. A single, solid red line is positioned below the main text, also following a similar wavy pattern.

# Signal through the noise

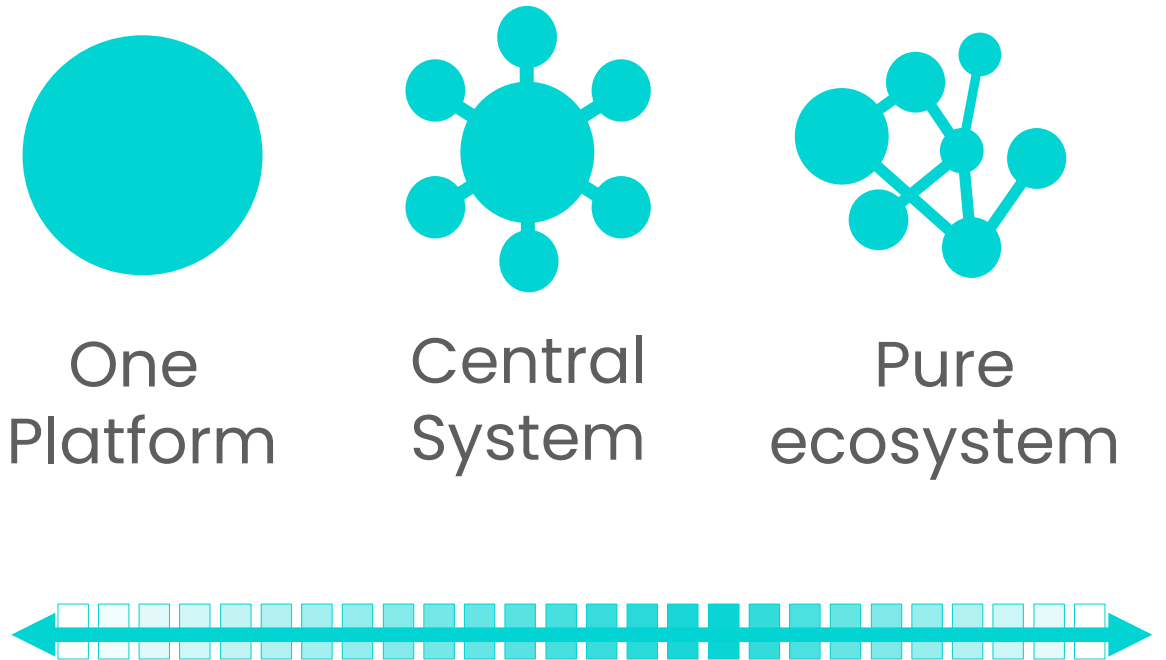
*Learning tech market is responding with...*



# (re) Rise of the platform

*Learning? Experience platform? Work platform?*

- Front door for learning
- LMS and LXP are converging into learning platforms
- Other things, like coaching, performance, skills, are hooking in
- More integrations so it *looks* like one system



# Skills academies

*aka capability or talent academies*

- Places where employees can learn and develop specific job-related skills
- Usually organized by team and strategic need, sponsored at business level
- Often cohort-driven

**Outlier**  
GUILD

Traditional  
Academics

 **LEARN IN**  
Acquired by Degreed  
  


Academy  
Platforms

 **NovoEd**  
 **INTREPID**<sup>TM</sup>  
by VitalSource<sup>®</sup>  
 **class**

Adapted for  
Academies



# Fascia / Automation

*Based on 2 ideas:*

- A development experience doesn't all have to happen at the same time to be cohesive
- AND a development experience doesn't all have to happen on the same platform to be cohesive

The logo for Loop, featuring the word "loop" in a lowercase, rounded, green font.

Acquired by 360 Learning

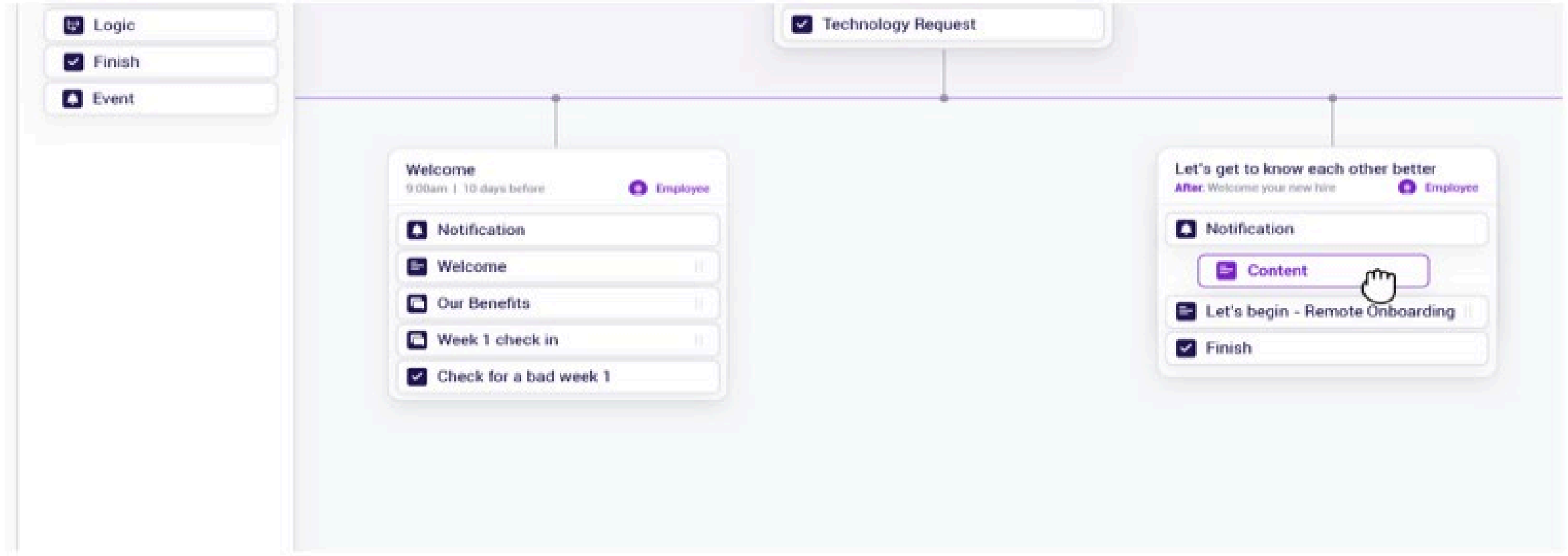
The logo for Arist, featuring a stylized orange and black triangle to the left of the word "Arist" in a bold, black, sans-serif font.The logo for Sparks, featuring the word "Sparks" in a large, grey, serif font.

Acquired by Degreed

The logo for Workramp, featuring a blue triangle composed of smaller triangles to the left of the word "WORKRAMP" in a bold, blue, sans-serif font.The logo for enboarder, featuring a purple icon of three interconnected circles to the left of the word "enboarder" in a purple, lowercase, sans-serif font.



# Fascia - pathbuilding



Enboarder



# Onboard Guidance

## Digital Adoption Platforms

- Digital adoption platforms (DAPs) are software that are layered on top of other programs to provide immediate support to users on how to use the software
- Digital adoption platforms (DAPs) are becoming more prevalent and in some cases, are replacing LMSes





# Connecting the humans

*Learning tech market is responding with...*



# Tech that builds human skills

- Pandemic shone a light on the importance of managers
- Seeing more tech to help managers be better managers
- Listening, nudges, passive tracking can give managers better information about their management skills

 humu

 Leapsome

 Mursion

**EMPLAY**

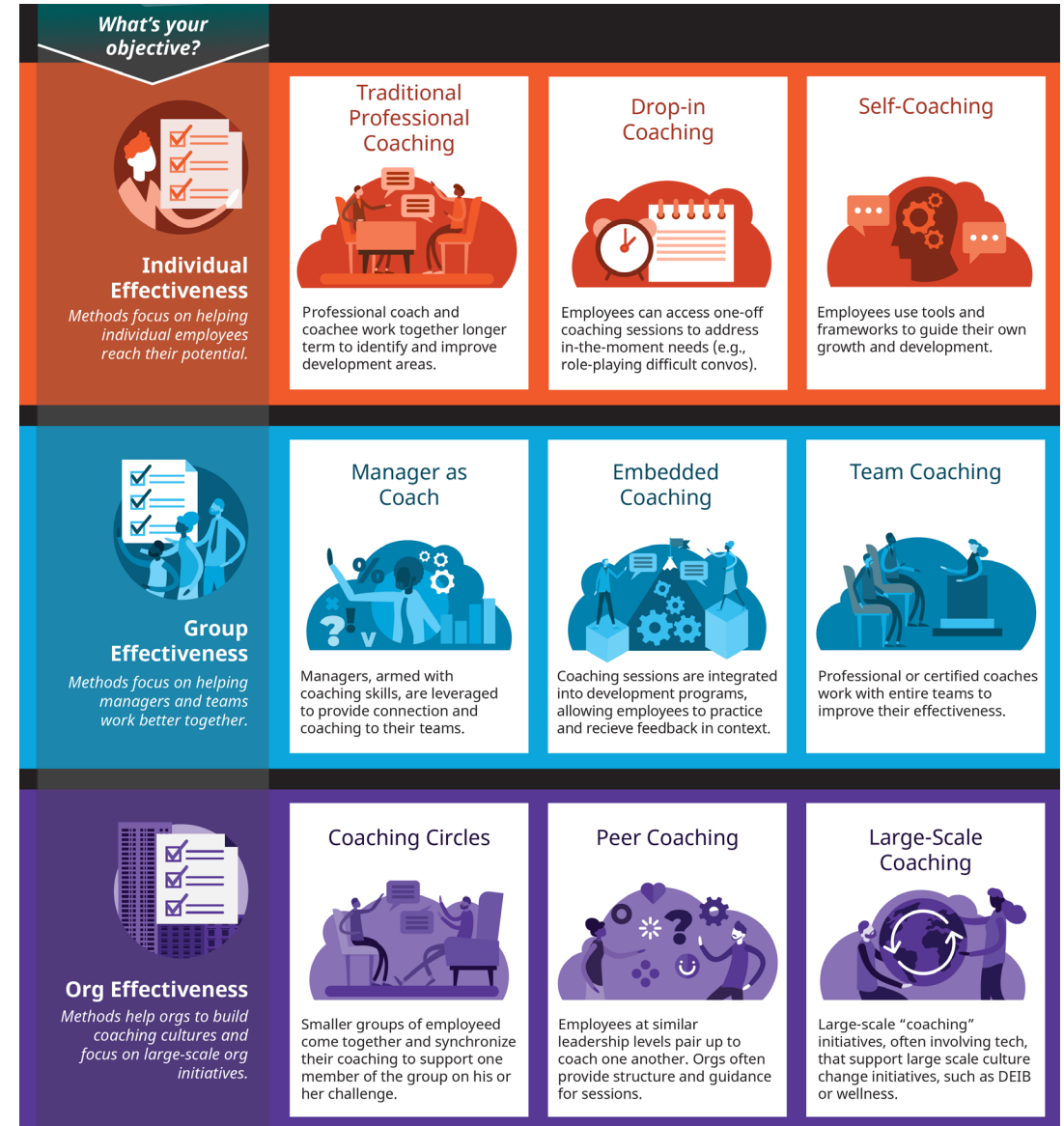
 cultivate  
Acquired by Perceptyx

 Orai



# Coaching tech

- Coaching tech is changing coaching
- Coaching isn't just a 1:1 anymore
- Coaching tech is HOT
- Coaching isn't just for senior leaders



# Coaching Tech



Acquired by Perceptyx



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# Cohort learning

- All vendors are building the human back in
- Whether orgs are adopting hybrid work or not, they're fighting *digital isolationism*
- L&D is remembering its roots: we learn from each other







Freedom to develop





# Content creation

- ChatGPT is changing the game here
- More user-generated content
- Orgs are understanding the need to deputize the organization
- Tech provides provides templates, guidelines, approval workflows



...and every vendor who provides content creation tools and is looking into LLMs



# Individual learning budgets

*We think we're seeing these because:*

- (Finally) being able to understand development costs
- Employees want more freedom
- Orgs need to develop the skills employees need – often they know best



# Frontline-specific solutions

- Pandemic provided the impetus many vendors needed to fix the frontline worker learning solution problem
- Most vendors started in manufacturing – as they digitized, they had the opportunity to move to digital work instructions and resources
- They can provide just-in-time learning, as well as continual development

**Axonify**

 BEEKEEPER

  
workday®

 **disprz**

**Augmentir**

 **Butterfly.ai**



# Employee dashboards

- No one is more motivated or able to use learning and skills data than employees
- Employees engaged with the system provide useful information to the org

93%

*of vendors in our skills study say they provide employees information about their skills*



# Employee dashboards

The screenshot shows a Workday interface with a 'Match Analysis' modal window. The modal lists skills such as 'Call Center Operations', 'Team Orientation', and 'Service Leadership'. It also identifies missing skills like 'Customer Service Relationship Management' and 'Management Mentoring', and suggests courses for development. The background shows a 'Reverse Mentoring Program' page with a 'Match Strength: Good' indicator.

Workday

The screenshot displays a Retrain dashboard for 'Wise Capital'. It features a 'Career paths (6)' section with progress bars for 'lateral' (98%), 'Open position' (94%), and 'Special' (62%) roles. Below this are sections for 'Matching skills' and 'Skills to develop', each with progress bars for 'Domain (Knowledge)', 'Personal (Knowledge)', and 'Core (Abilities)'. A 'Capability match analysis' radar chart compares 'Desired' and 'Me' across various capabilities like 'Resilience & Flexibility' and 'Communication'. The Retrain logo is visible in the bottom right corner.

Retrain







# More with less?

*Which could lead to ...*



# More bang for the proverbial buck

- Cornerstone / Edcast
- Cornerstone / SumTotal
- Degreed / Learn In
- LinkedIn / Paddle
- Skillsoft / CodeAcademy
- ServiceNow / Hitch
- LTG / GP Strategies
- Udemy / CorpU
- Pearson / Credly
- Axonify / Mlevel
- Valamis / The Working Manager
- Fuse Universal / Power Guides
- Go1 / CoopAcademy
- 360Learning / Loop
- Microsoft Viva / Ally



# More attention to Efficiency

- As budgets allegedly get smaller, organizations are looking at efficiencies
- 2 technologies we have run into focus specifically on learning operations, or learning efficiency

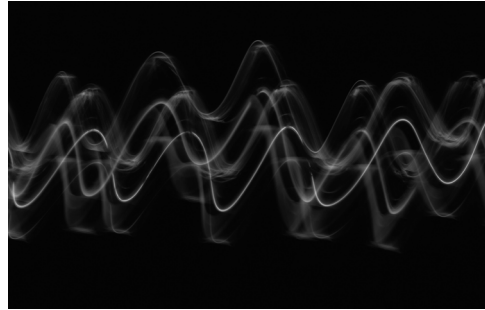




# The learning tech market is enabling...



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More with Less?

Skills	Platforms	Human skills with tech	Content creation	More consolidation
Opportunity platforms	Skills academies	Coaching	Learning budgets	Learning operations
	Fascia / Automation	Cohort learning	Employee dashboards	
	Onboard guidance			



# Thank you to the Tech Consortium!

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