redthread research

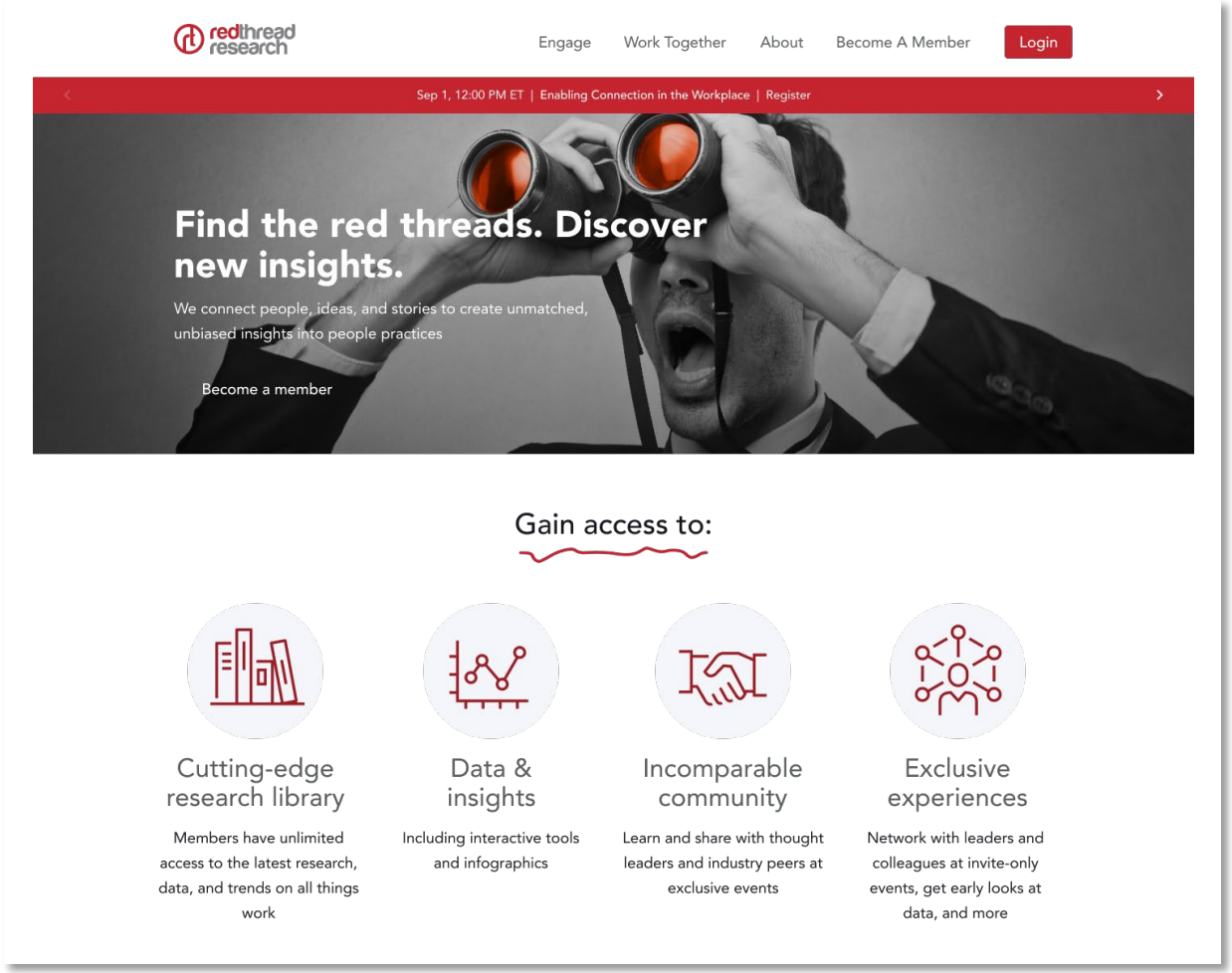
Learning Tech Trends

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

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Thank you to the Tech Consortium

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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

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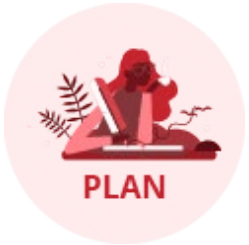
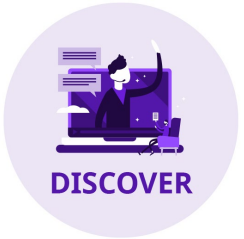
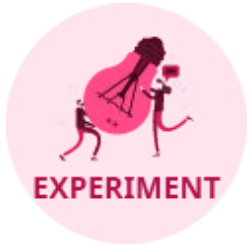
2021 learning tech functionalities

EXPERIENCE **ADMIN**







Career Planning	Content Curation	Podcasts	Video Practices	Mentoring / Coaching	Performance Tracking	Back Office Training Mgt.	LRS
Skills Tracking	Recommendation	Content Libraries	AR / VR	Collaborative Learning	Enablement	LMS	Analytics
Assessment	Adaptive Learning	Microlearning	Opportunity Marketplaces	Expertise Directories	Certification	LCMS	Surveys & Evaluations
		LXP			Knowledge Repositories	Content Creation	
		MOOC				Extended Enterprise	
		Gamification					

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Source: RedThread Research

2023 learning tech functionalities

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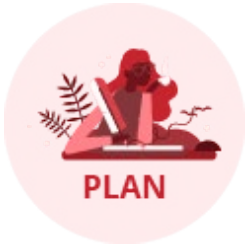

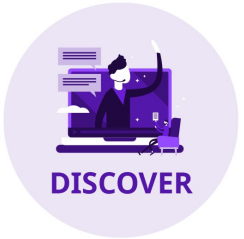

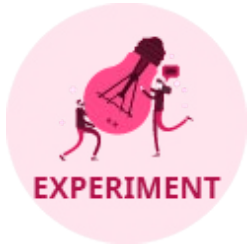

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	Skills Academies	LXP			Knowledge Repositories	Extended Enterprise	Employee Dashboards
	Fascia / Automation	Gamification				Individual Learning Budgets	

Generative AI

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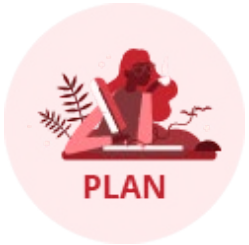
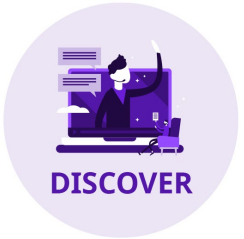
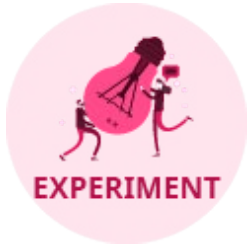
Source: RedThread Research

Hot or not?

EXPERIENCE | **ADMIN**







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Generative AI

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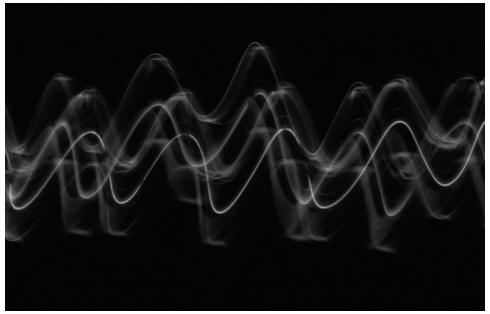
The learning tech market is enabling…

Skills & mobility for learning



A signal through the noise

Connecting of humans

Freedom to develop

More with Less?

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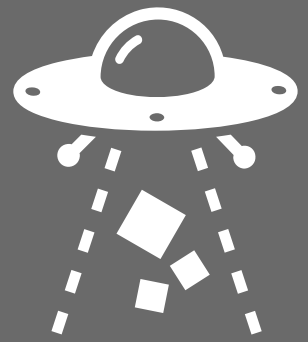
Skills & mobility

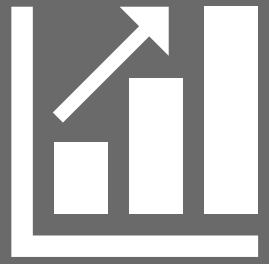
Learning tech market is responding by…

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

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What skills tech does

The most common functionalities offered by Skills tech today

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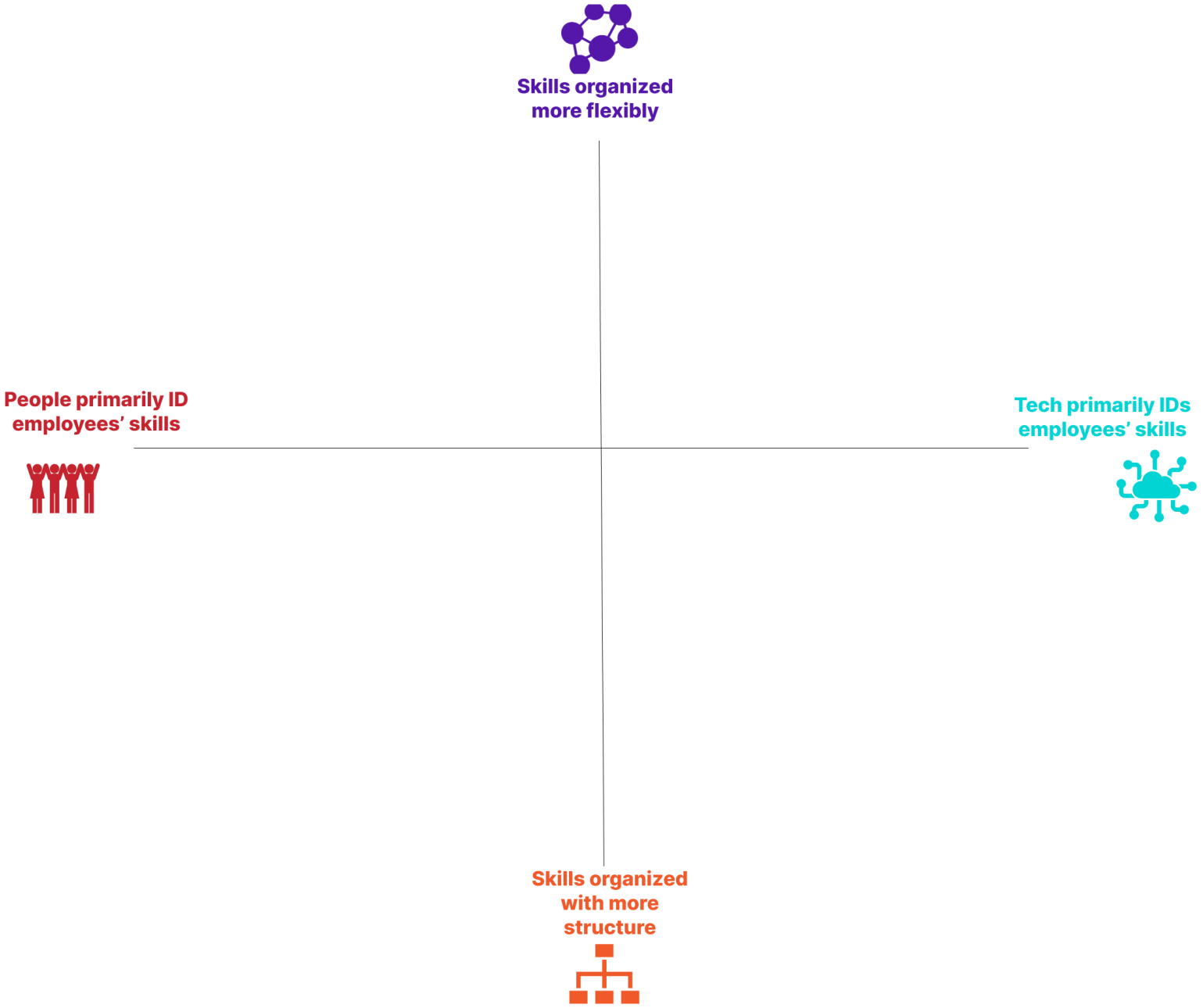
Skills tech

55 Vendors in this study organized along 2 dimensions:

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



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Skills tech

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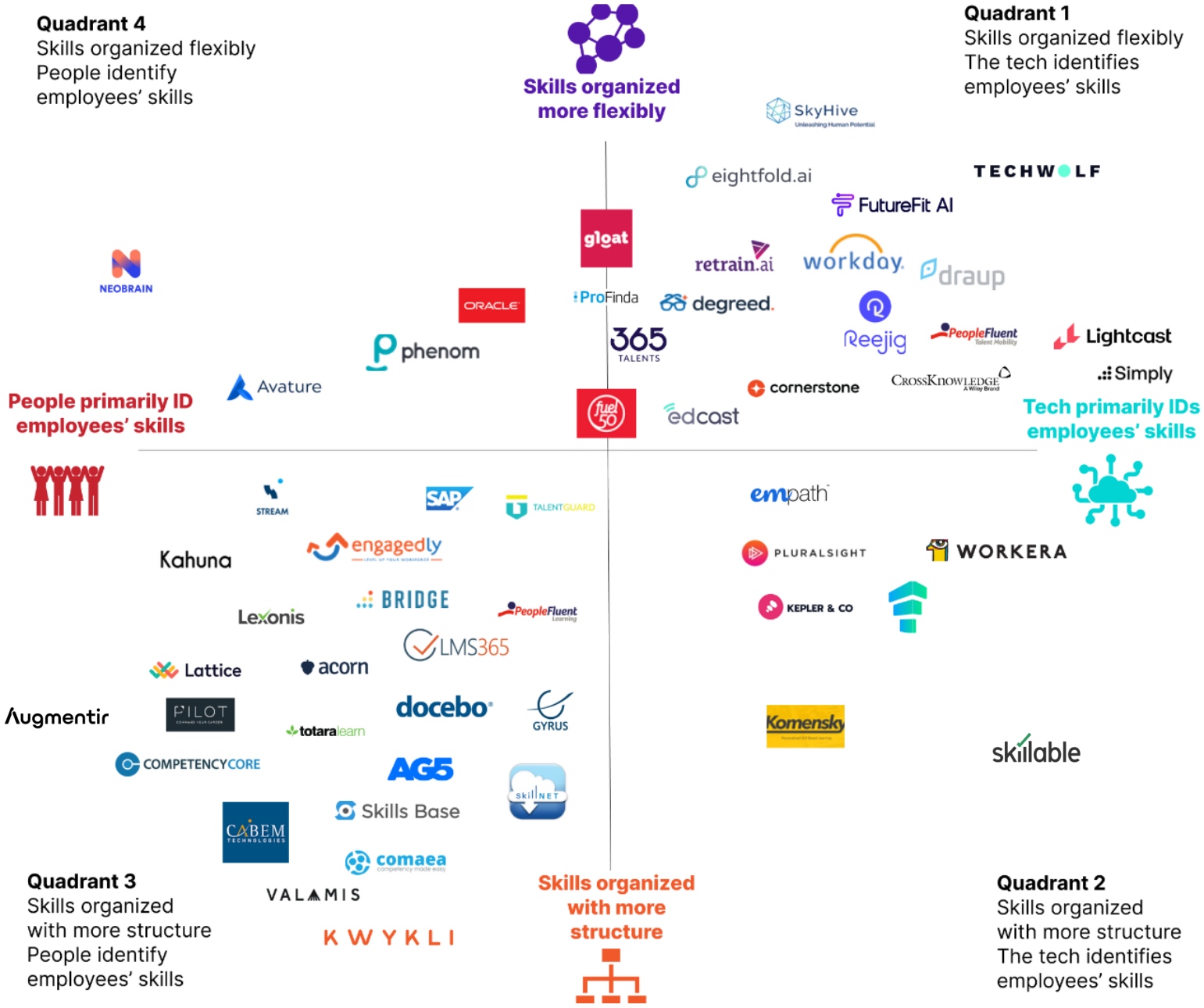

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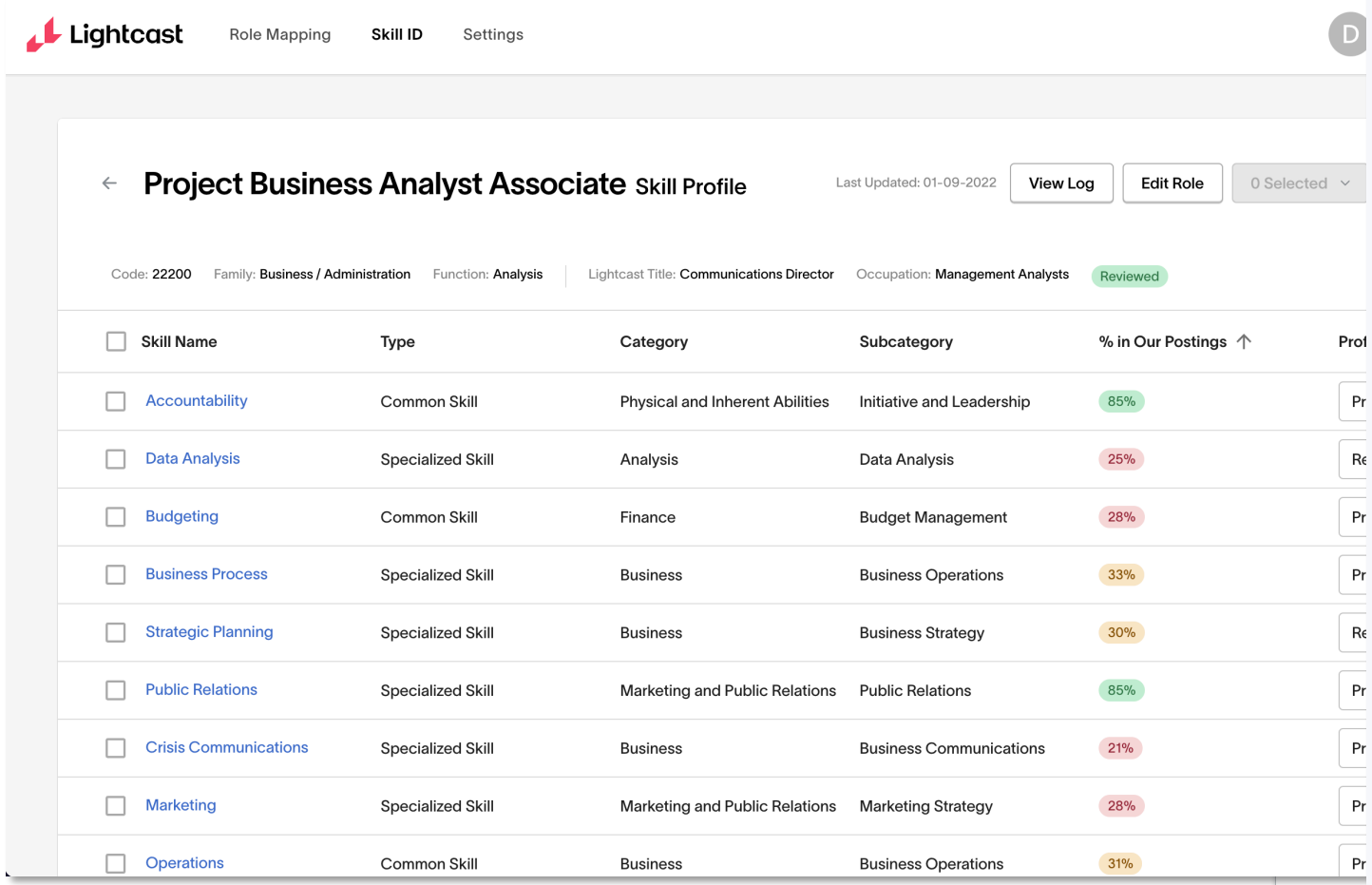
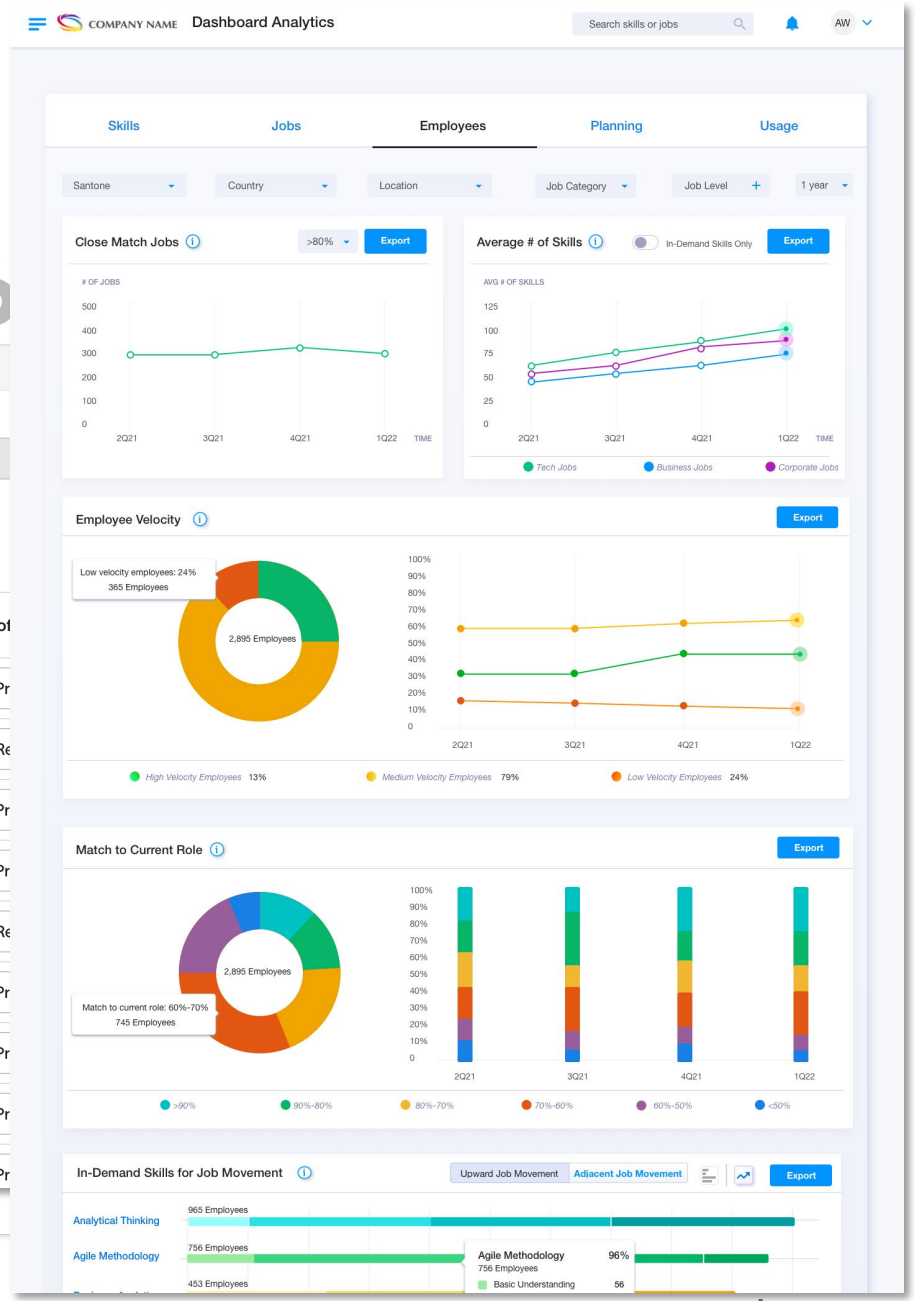
Skills at an org level





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Lightcast

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

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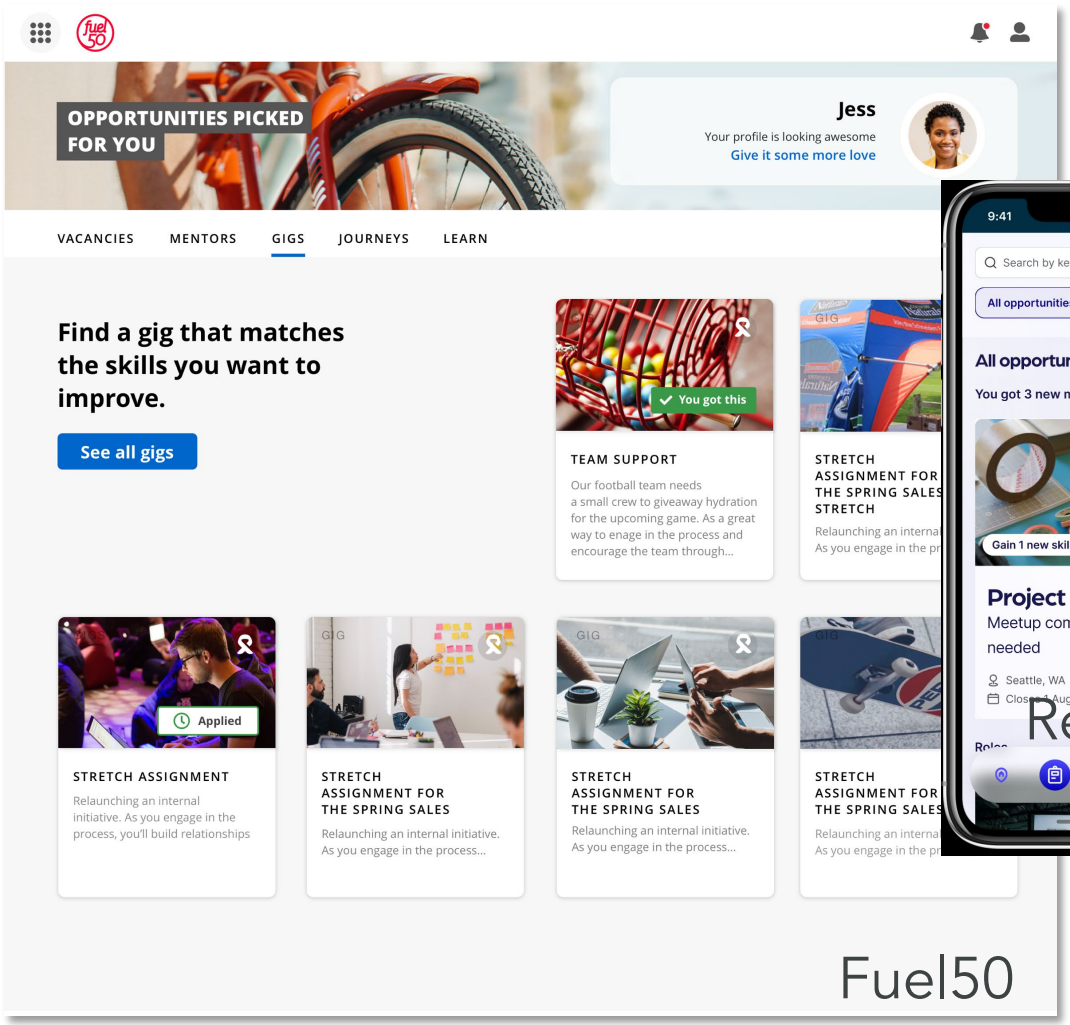
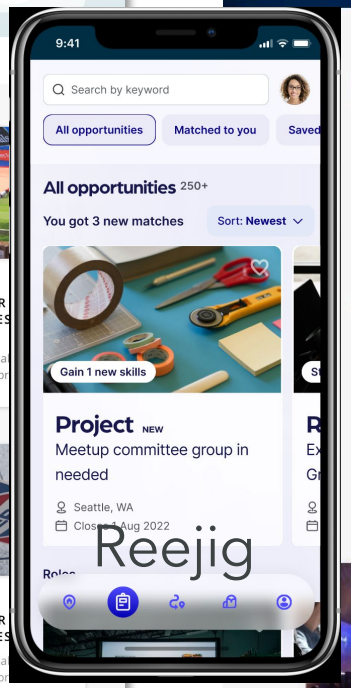
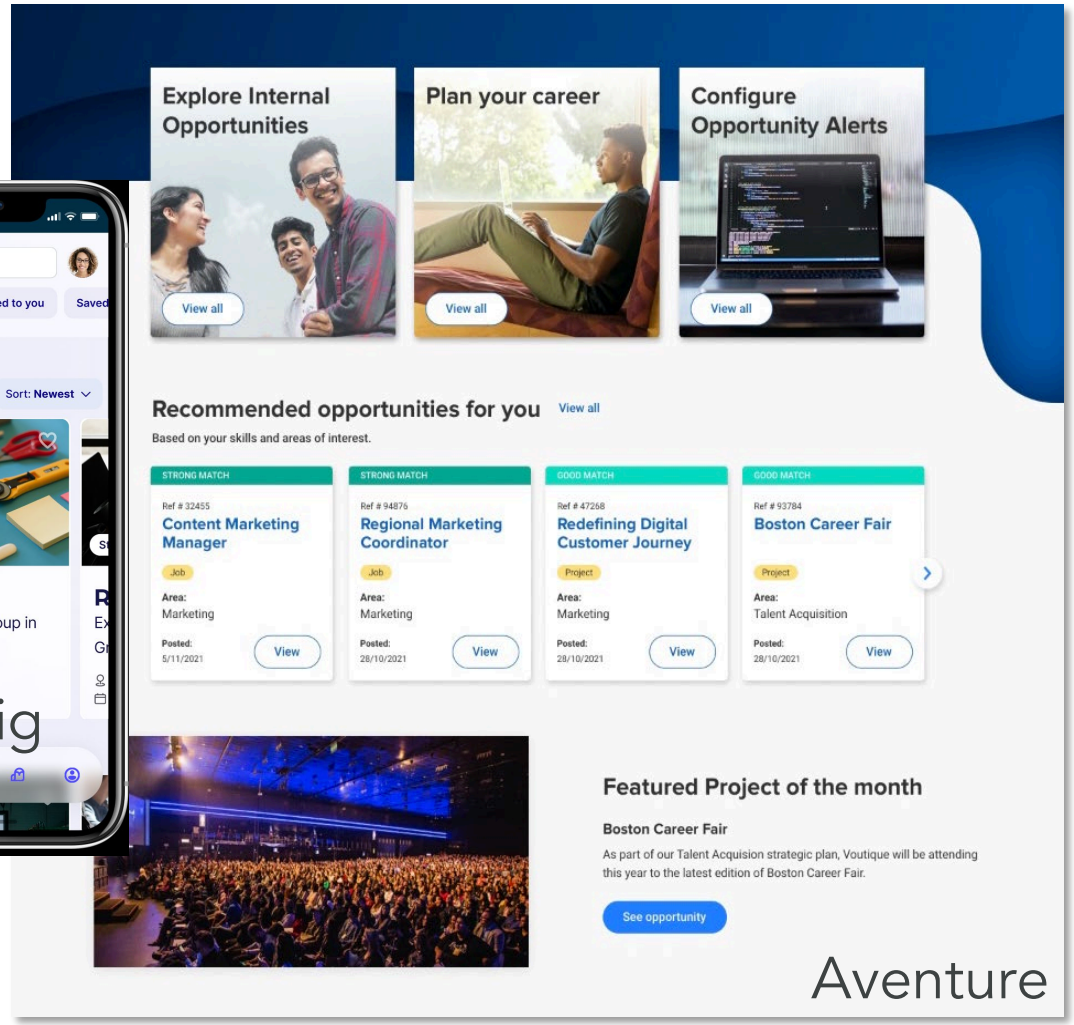
Gigs *and* jobs







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Signal through the noise

Learning tech market is responding with…

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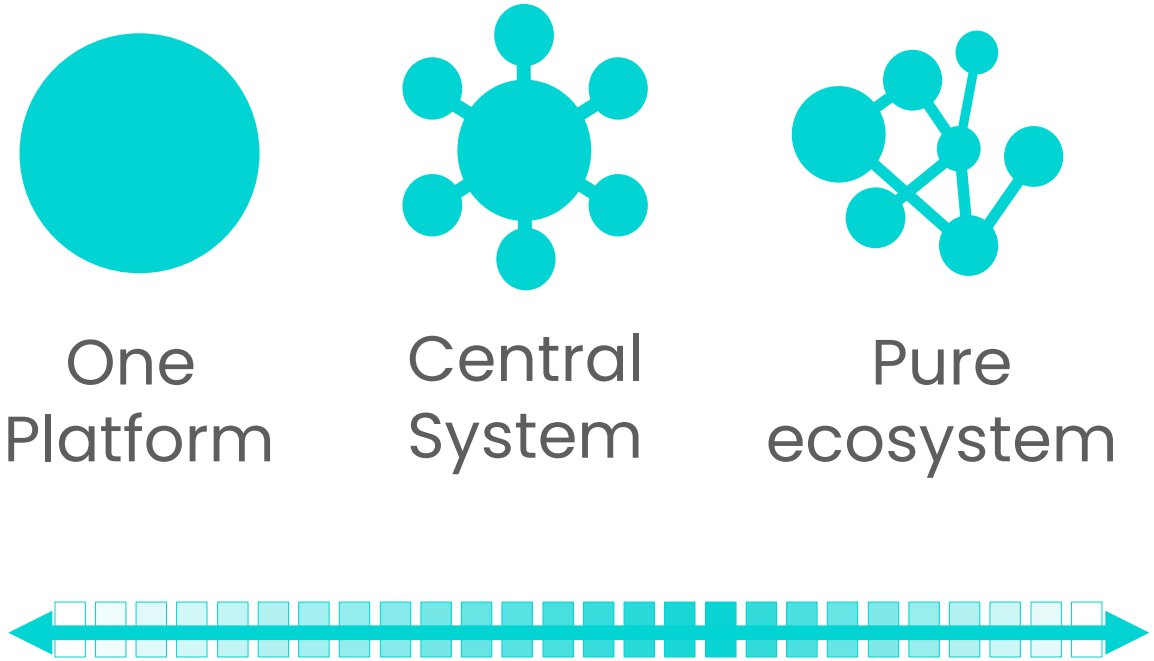
(re) Rise of the platform

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



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Source: RedThread Research

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

Traditional Academics

Outlier

GUILD

Academy Platforms

LEARN IN
Acquired by Degreed

udemy

modal

Adapted for Academies

NovoEd

INTREPID™
by VitalSource

class

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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

Loop
Acquired by 360 Learning

Arist

Sparks
Acquired by Degreed

WORKRAMP

enboarder

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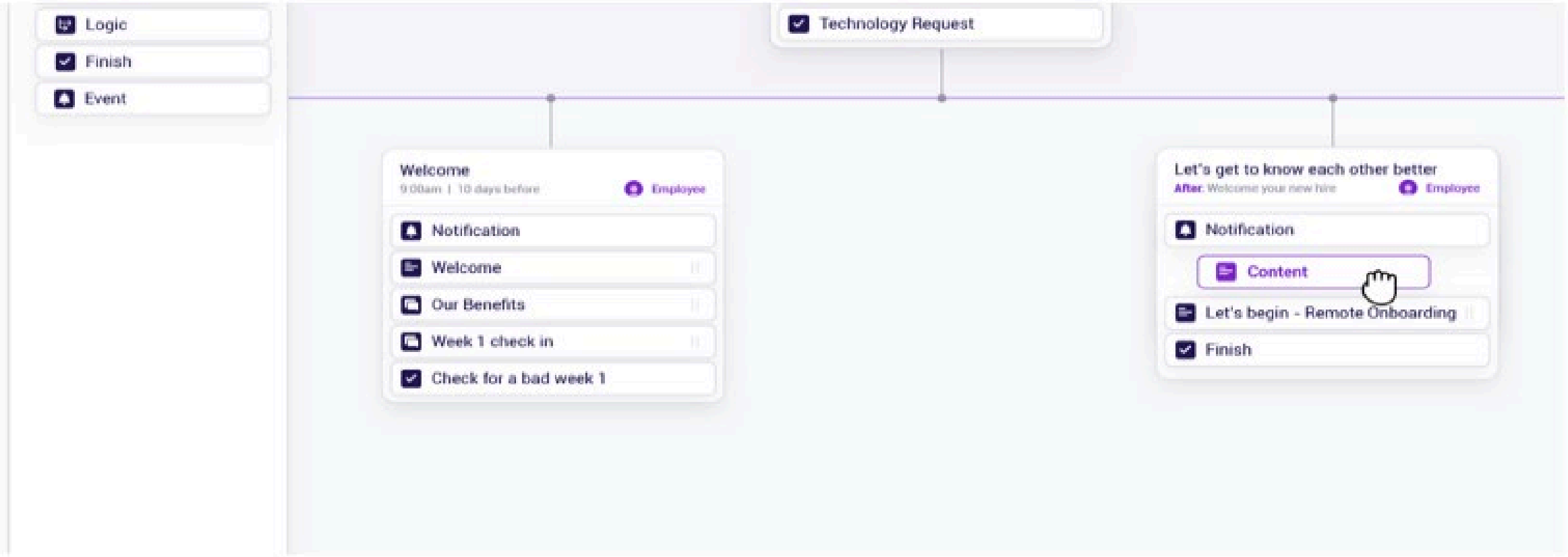
Fascia - pathbuilding



Enboarder

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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

whatfix
walkme
pendo
userlane
Appcues
userpilot
Gainsight
apty
INTERCOM

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Connecting the humans

Learning tech market is responding with…

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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

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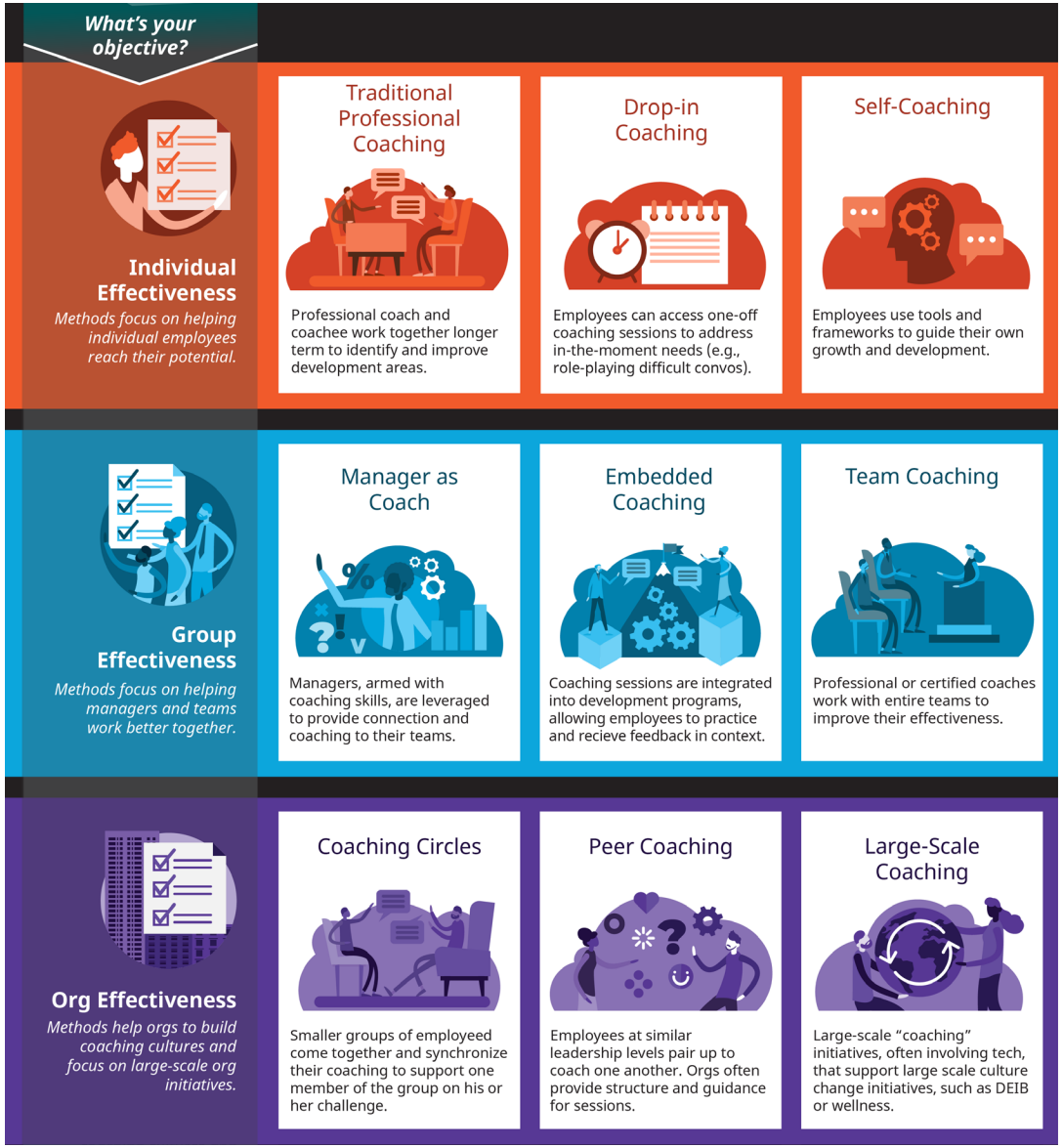
Coaching tech

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



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Coaching Tech

growthspace

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

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Freedom to develop

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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

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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

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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

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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

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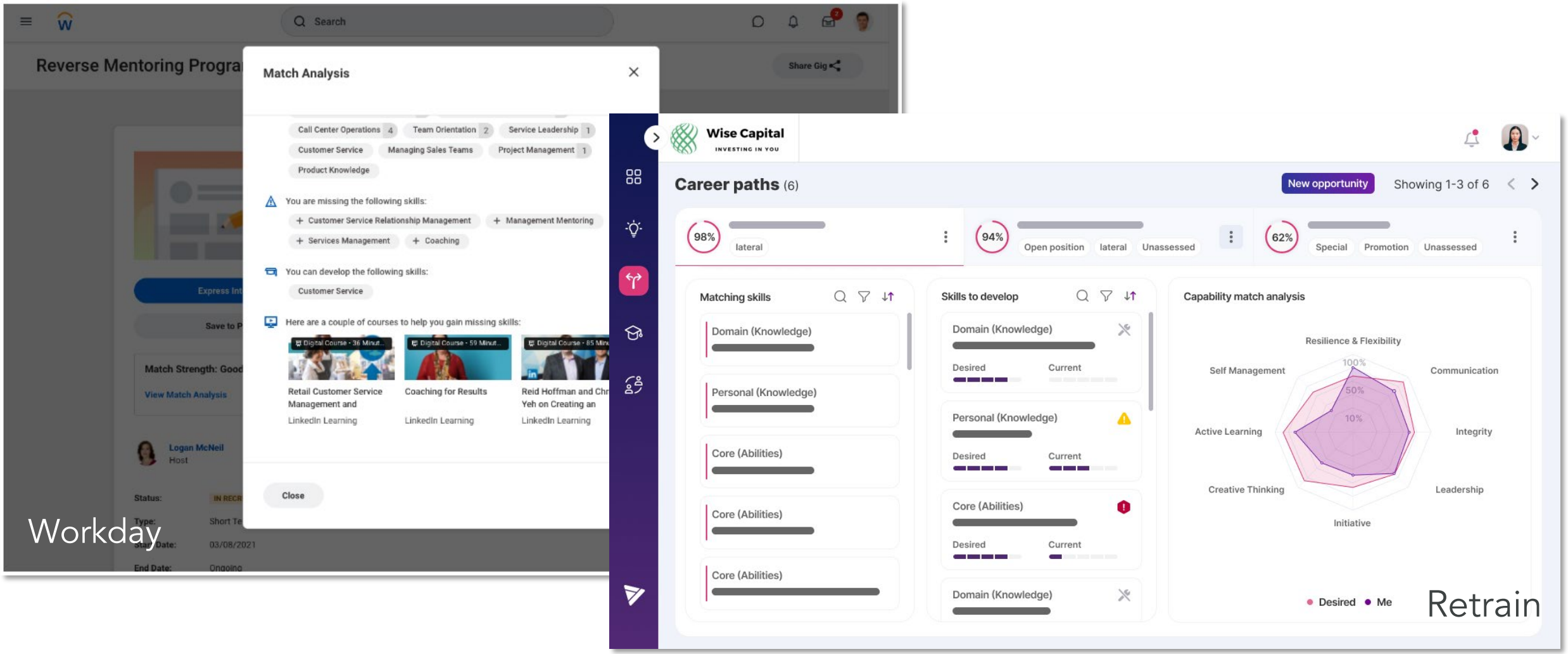
Employee dashboards



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More with less?

Which could lead to …

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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** / CoorpAcademy
- **360Learning** / Looop
- **Microsoft Viva** / Ally

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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

COGNOTA

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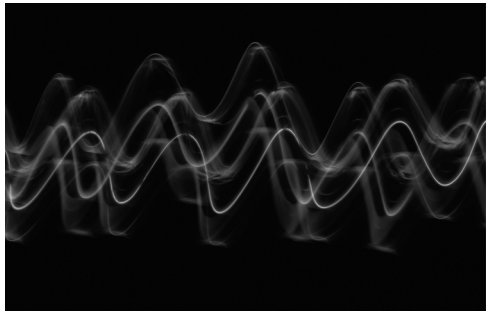
The learning tech market is enabling…

Skills & mobility for learning

- Skills
- Opportunity platforms



A signal through the noise

- Platforms
- Skills academies
- Fascia / Automation
- Onboard guidance

Connecting of humans

- Human skills with tech
- Coaching
- Cohort learning

Freedom to develop

- Content creation
- Learning budgets
- Employee dashboards

More with Less?

- More consolidation
- Learning operations

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