



Market Overview

Video Solutions for Corporate Learning – 2017

Executive Summary

Market Overview of the Application of
Video for Corporate Learning and
Coaching

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Table of Contents

Executive Summary	1
High-Level Findings	2
Vendors Included	3
Overview	4
Evolving Technologies in the Context of Corporate Learning	5
The Impact of Consumer and other Business-Oriented Information Technologies on Learning	5
Methodology	6
Functional Architecture	7
Key Capabilities of Systems Supporting Video Learning	7
Learning Management Features	8
Video Streaming and Management Features	9
Five Video Learning Use Cases	11
Market and Customer Benefits	12
Vendor Categories	13
Vendor Discussion	15
Learning Management Platforms	16
Informal Learning and Coaching Platforms	20
Video Platforms	23
Technology and Market Trends – Going Forward	26

List of Figures

Figure 1: Video Learning Functional Architecture	7
Figure 2: Use Case - Functionality Matrix	11
Figure 3: Learning & Streaming for Training Supplier Categories	13
Figure 4: Comparison of Learning Management Platforms for Video Learning	17
Figure 5: Comparison of Informal Learning and Coaching Platforms	20
Figure 6: Comparison of Video Platforms for Corporate Learning	23

Executive Summary

The report covers the worldwide market for video-enabled, on-premises products and hosted services / cloud offerings *as applied for corporate learning*. Included in this report are three types of platforms that together are changing how learning leaders think about video as a corporate asset for training:

- Human Capital Management (HCM) / Learning Management System (LMS) platforms that include video streaming and sharing technologies. While there are dozens of HCM vendors and hundreds of LMS vendors, this is an emerging subset of these vendors that has started to add video capabilities.
- Informal learning and coaching platforms that typically combine learning management features such as assignments, tracking, and, in some cases, assessments with video capture and content creation tools. Some of these vendors collect and curate pre-packaged, internet and company-generated content, while others provide content.
- Streaming video and video content management platforms that historically have handled several use cases for other functional areas but which have evolved to include specific sets of features designed to enhance learning. Use cases include blended learning, onboarding, and Enterprise YouTube.

Video is not only enabling new approaches to on-demand and informal learning, but also enhancing more conventional methods of instruction, blending well with instructor-led training and e-learning. The ecosystem serving this market consists of a group of vendors that differ greatly in their approach and breadth of their solutions, where many partner while others provide a comprehensive solution.

In researching these solutions, we were impressed with the range and depth of capabilities. Some vendors specialize in specific use cases while others offer video learning platforms that address multiple use cases. The primary use cases this report discusses include blended learning, onboarding, personal development, enterprise YouTube (performance support / expertise capture), and coaching.

This report is intended to arm the reader with an understanding of what's required to formulate a video learning strategy, identify a short list of potential vendors, and (for users) make the right decision regarding becoming a customer or (for vendors) identify potential partners. Included are:

- *Market Overview* – Discussion of the evolving technologies, both business-orientated and consumer, in the context of corporate learning.
- *Functional Architecture* – Basic sample flow of information through a video learning system, describing how learning management and streaming / video management systems interact.
- *Key Capabilities* – Specifics regarding key functions of an LMS and video streaming / video content management system. This includes strengths of each type of platform and how its elements may fit into a workflow.
- *Video Learning Use Cases* – Description of five major video learning use cases and the relative importance of a set of functions and capabilities as applied to those use cases.
- *Market and Customer Benefits* – Discussion of the benefits L&D can achieve by introducing video learning to an organization's learning strategy. From just-in-time productivity to time savings for subject matter experts, and efficiencies in formal learning systems to video coaching's impact on sales efforts, video learning's impact can be profound.
- *Vendor Discussion* – Evaluation of the vendor community based on a variety of both objective and subjective factors, examining the respective completeness of offerings, depth of vision,

support for learning processes, and ability to partner with other vendors or service providers and ability to execute. Many (but not all) vendors assessed provided WR with product/service demonstrations. Three vendor positioning snapshots – one for HCM/LMS providers, one for informal/coaching platforms, and one for video streaming and content management providers are included for helping readers assess the vendor ecosystem.

- *Technology and Market Trends Going Forward* – Wainhouse Research sees several trends in the market and technology related to video learning, and provides a discussion of developments in Artificial Intelligence, Social Learning, Microlearning, cloud, video conversion and delivery, data insights, mobile device management, augmented and virtual reality, and learner-generated content. This report also describes the factors important in broadly making video an asset for corporate learning – areas buyers of the technologies should consider as they explore deploying these technologies.

High-Level Findings

While video learning is still in its early days for most enterprises, Wainhouse Research sees these approaches as likely to be highly successful in the one-to- three-year timeframe:

- **Social Learning.** Many use cases could be addressed by combining social capabilities such as groups or communities, discussions, and learner-generated video. Several of the established LMS providers, such as SAP/SuccessFactors, Adobe, Docebo, Oracle, and Saba offer out-of-the-box social video solutions ready for L&D teams exploring use of video across their programs.
- **Coaching.** Coaching is getting a lot of attention because, in addition to being core to modernizing performance management, it helps the learning process by encouraging practice and feedback. HireVue, TechSmith, and Viddler have products that use video recording and feedback tools that make coaching asynchronous and often more efficient, while PlayerLync has a video distribution system that offers some LMS capabilities.
- **Microlearning.** While the established LMS vendors all support Microlearning, none do so to the degree that EdCast or Grovo do. Both are strong at curating content and offer authoring tools. They differ in the content they manage: EdCast will harvest internal and external sources, whereas Grovo relies largely on its growing library of video learning titles.
- **Core Video.** For L&D teams that are looking for a partner to provide core video capabilities so they can produce and stream video for inclusion in their learning programs, streaming providers offer strong solutions and many integrate with major LMS platforms. Some, such as Panopto, Sonic Foundry, and Kaltura, offer robust content management platforms with extensive capture and editing tools. Others, such as IBM Ustream, offer AI features designed to support very rich search and recommendation features.

Customers are seeing a range of benefits. Through many shared anecdotes, the vendors briefed for this report confirm the results we have seen in a quantitative study conducted by Wainhouse Research in the fall of 2016¹:

- 85% agree that when looking for guidance in handling a specific task, on-demand videos offer better help than written instructions.
- 92% agree that on-demand video archives offer a valuable storehouse of institutional knowledge.

¹ Wainhouse Research subscribers can read further discussion of this survey in these research notes: [Gauging Implementation and Interest in "Enterprise YouTube" Capabilities](#) and [Analysis of Video Learning Effectiveness](#).

- 89% agree that online training sessions provide higher quality of learning because “I can learn at a time when I can focus on the content.”

Nonetheless, video is a new data type for most learning and development teams, and it can be integrated into learning workflows with favorable and unfavorable outcomes. This report is designed to clarify and provide guidance for those considering deployment of the video learning and drive efficiencies in their organizations.

Vendors Included

In alphabetical order, top HCM / LMS players this report covers include:

- Adobe
- Blackboard
- Cisco
- Cornerstone
- Docebo
- Fuse Universal
- Oracle
- Saba
- SAP/SuccessFactors
- SumTotal
- Wisetail
- Workday

Leading informal learning and coaching platforms covered include:

- Allego
- Brainshark
- EdCast
- Grovo
- HireVue
- PlayerLync
- TechSmith
- Viddler

Live streaming / capture / store vendors with on demand access covered in this report include:

- Haivision
- IBM uStream
- Kaltura
- Knowledgevision
- MediaPlatform
- ON24
- Panopto
- Qumu
- Sonic Foundry
- TalkPoint
- VBrick
- West

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