



Market Overview

Video Solutions for Corporate Learning – 2018 Executive Summary

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

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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 and IT decisionmakers 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, an emerging subset of these vendors has started to add video capabilities.
- Focused platforms for informal learning and coaching that typically combine LMS 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 and others provide a comprehensive solution.

In researching these solutions for the second year in a row, we are impressed by 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.
- *2020 Enterprise Learning Technology Stack* – Description of how learning management and streaming / video management systems interact within the enterprise learning technology ecosystem.
- *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 (SMEs), 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, 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 Microlearning, Social Learning, the Netflix UX metaphor, learning in the workflow, podcasts and audiobooks, Artificial Intelligence, data insights, mobile device management, augmented and virtual reality, and learner-generated content / flipped content creation. 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

Video learning is catching on in many enterprises, though many more continue to grapple with how to incorporate video into their learning workflows. The learning management vendors who have invested in video functionality and infrastructure are being rewarded with robust growth, some experiencing nearly 100% increases in sales, year over year. The streaming and webcasting vendors who focus on learning find a more competitive environment but often find that learning is the leading use case for streaming video – and helps expand deployments beyond corporate and intra-enterprise communications.

Customers are seeing a range of benefits: higher productivity, elevated employee engagement and retention, more efficient business processes, to name a few. These all underpin how to transition to a more agile organization and point to Learning and Development's evolving role.

Through many shared anecdotes, the vendors briefed for this report confirm the results we see from [a quantitative study conducted by Wainhouse Research in the fall of 2017](#):

- 87% agree that recorded training videos are a valuable work tool, giving access to information when it is needed most.
- 80% agree that coaching and mentoring using self-recorded videos would be an effective way to help improve skills.
- 88% agree that on-demand videos created by subject matter experts are a valuable resource when they are working on a new or unfamiliar task.

Wainhouse Research sees these trends as key drivers of video learning and in some case, corporate learning in general.

- **Microlearning.** The established LMS vendors all support microlearning, but the degree of support can vary considerably. Nearly all allow the blending of short clip videos and other informal learning items in learning programs, with Saba, Docebo, and SAP SuccessFactors leading with functionality that allows learners and L&D to contribute content. Grovo and EdCast, from the Focused Platform category, are strong at curating content and offer authoring tools, while PlayerLync is strong at delivery and management. 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. Short-clip video is one of the top three preferred methods of learning, as demonstrated in [the Fall, 2017 WR survey of 2,004 knowledge workers](#).

- **Learning Experience Platforms (LXPs).** [These platforms](#) have replaced the LMS's learner portal at some organizations as they provide easier access to a broader set of learning content – and learner pathways and often social capabilities. The incumbent LMS vendors have responded by improving the learner experience and making it easier for their customers to build out informal learning paths containing content from a larger number of sources.
- **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. Allego, D2L, 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.
- **Social Learning.** Many use cases can be addressed by combining social capabilities such as groups or communities, discussions, and learner-generated video. Several LMS providers, such as SAP SuccessFactors, D2L, Docebo, Fuse Universal, and Saba offer out-of-the-box social video solutions ready for L&D teams exploring use of video across their programs.
- **Artificial Intelligence.** Numerous vendors have AI or more specifically machine-learning algorithms that help curate and recommend learning objects and activities to learners based on their usage patterns and profile attributes. This year we expect to see the pace pick up as AI becomes more a part of everyday work, not just learning. The path to market will be worth watching. While IBM Cloud Video touts its lead because it's part of the company that owns and markets IBM Watson, the fact is, Watson is "for sale" and being integrated with a growing number of products, such as Workday Learning and some of the streaming video providers. Other vendors like Adobe and EdCast have developed or are developing their own AI, and major cloud platform providers, such as Amazon Web Services, Google, and Microsoft will be shepherding their own machine learning efforts that support video learning.
- **Core Video.** For L&D teams that are looking for a partner to provide core video capabilities to help them produce and stream video for inclusion in their learning programs, streaming providers offer solutions, and many integrate with major LMS platforms. Some, such as Panopto, Sonic Foundry, KnowledgeVision, and Kaltura, offer robust content management platforms with extensive capture and editing tools.

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

Vendors Included

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

- Adobe
- Blackboard
- Cisco
- Cornerstone
- CrossKnowledge
- D2L
- Docebo
- Fuse Universal
- Oracle
- Saba
- SAP/SuccessFactors
- Skillsoft/SumTotal
- Wisetail
- Workday

Leading informal learning and coaching platforms covered include:

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

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

- Haivision
- IBM Cloud Video
- Kaltura
- KnowledgeVision
- MediaPlatform
- ON24
- Panopto
- Qumu
- Sonic Foundry
- TalkPoint
- Vbrick
- West

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