



# **“Learn Everywhere” is the Key to Talent Productivity, Growth and Retention**

FEATURING RESEARCH FROM FORRESTER

The Forrester Wave™: Learning  
Management Systems And Experience  
Platforms, Q4 2021



## IN THIS DOCUMENT

“Learn Everywhere” is the Key to Talent Productivity, Growth and Retention

Research From Forrester: The Forrester Wave™: Learning Management Systems And Experience Platforms, Q4 2021

About Absorb Software

### LEARNING UNDERPINS NEARLY EVERY BUSINESS CHALLENGE.

For decades, businesses have recognized the importance of investing in their most valuable resource—their people. But as a [record-breaking number](#) of employees leave their jobs as part of “The Great Resignation,” it’s increasingly necessary for businesses to deliver on employees’ needs and provide them with meaningful reasons to stay and grow.

COVID-19 and its impact on workplaces, and the economy at large, drove substantial changes in employee needs and expectations. As the world recovers from the pandemic, people are re-evaluating their work environments and personal needs. Smart organizations see an opportunity; they understand that an investment in talent will push them ahead of the competition, attract the best talent, reduce turnover and accelerate business results.

Learning is at the very crux of an effective business strategy. Providing opportunities for people to grow their skills, build knowledge and find purpose is a key differentiator for successful organizations. Learning feeds curiosity, agility, engagement, performance, productivity, innovation and retention as a holistic solution.

Let's look at four areas where learning is undeniably an essential component to a successful talent strategy.

- **Corporate Communications & Training:** As flexible work options grow increasingly essential, it's created new challenges around providing consistent and engaging workplace communication. Learning and development programs help facilitate effective change management; and ensure that executives, employees and other stakeholders are equipped, engaged and aware of standards and expectations.
- **Reskilling, Upskilling & Talent Development:** Businesses that provide employees with opportunities to learn new skills, advance existing ones, pursue growth paths and boost their performance, [will be more likely to thrive, innovate and adapt](#) when faced with tomorrow's business challenges.
- **Worker Flexibility & Well-Being:** Employers have an opportunity—and responsibility—to reimagine and redefine the worker experience. Combining flexible work options and wellness training can help build resilience, confidence and peace of mind, which has an influential, positive impact on employee retention.
- **Corporate Trust & Accountability:** People seek out employers whose values align with theirs. Businesses that connect actions, policies and practices with corporate values, and hold themselves accountable, will attract top talent. It's critical that executives and leadership take time to learn what's most important to prospective talent and current top performers.



For these reasons and others, today's leading organizations declare learning platforms as mission-critical technology to recruit, develop and retain top talent; solve key business challenges; and feed employees' relentless thirst for growth. The world's appetite for modern, agile and performance-driving learning and development platforms is greater than ever.

### **ABSORB POWERS AN ALWAYS-ON LEARNING CULTURE. EVERYWHERE.**

Absorb was founded in 2002 to address critical business challenges and deliver real business value—and enhance talent recruitment, development and retention strategies—with its modern, award-winning, easy-to-use learning platform that seamlessly integrates with other workplace technology applications.

Absorb understands that smart businesses grow and succeed by embedding the strategic value of learning into every level of their enterprise. The company's industry-leading learning management software (LMS), Absorb LMS, powers learning for over 1,500 organizations in every industry across the globe. With offices in Canada, the United States, Ireland, England and Australia, the company continues to rapidly expand to provide high-quality learning solutions everywhere.

Absorb LMS elevates learning for employees, customers and the extended enterprise, and Absorb's agile, differentiated and flexible approach to eLearning offers one of the most holistic solutions in the industry. The company boasts several advanced products and features that aren't offered by other LMS providers, including [Absorb Infuse](#), the first true in-the-flow learning experience that embeds learning into any business process or application; [Absorb Create](#), a cloud-based course builder offered as both a standalone product and a seamless Absorb LMS integration; [Absorb Analyze](#), a smart, self-service business intelligence tool that takes LMS reporting and analytics to the next level; and a slew of other [artificial intelligence](#) features that keep learning simple and intuitive.

Absorb's aggressive growth trajectory began in 2017 when the company received investment from Boston-based growth equity firm [Silversmith Capital Partners](#). Four years later, Absorb received a valuation of over \$500 million and a significant investment and [new partnership from Welsh, Carson, Anderson & Stow](#), a global private equity firm. Both partnerships have enabled Absorb to provide its customers with best-in-class products and services, and sustain the company's remarkable growth.

As the world's workplaces moved online in 2020, Absorb experienced a [record year](#). The company continues to expand its global reach, resources, staffing and software in every direction, while maintaining its renowned customer experience and support. Absorb consistently leads other top LMS providers in [customer reviews](#), and in a recent survey, 96% of users preferred Absorb LMS' learner experience over other LMS systems. Within the same survey, 92% of users felt Absorb LMS' administrative efficiency was above the rest.

Absorb has also received over 90 awards from notable technology organizations—many based on customer nominations, feedback and reviews—including PC Magazine's Editor's Choice Award, Training Industry's top 20 Learning Portal/LMS, Brandon Hall Group excellence awards, eLearning Industry Best LMS System, Capterra Top 20 User Friendly LMS, G2 Easiest to Use, G2 Momentum Leader and G2 Easiest Admin.

## HOW THE RIGHT LMS POWERS SUCCESS



### A STRONG PERFORMER IN LEARNING MANAGEMENT SOFTWARE.

In the *Forrester Wave™: Learning Management Systems and Experience Platforms, Q4 2021*, Absorb was named as a Strong Performer and received the highest score possible in the Commercial Model criterion, and among the second highest in the Technology criterion and among the third highest in the Administrator Experience criterion.

“[Absorb’s] ‘Learn Everywhere’ vision is designed to expand beyond the LMS as a destination and embed learning into all aspects of work, an approach that is well-aligned with customer and market demands.”-*The Forrester Wave™: Learning Management Systems And Experience Platforms, Q4 2021*

# The Forrester Wave™: Learning Management Systems And Experience Platforms, Q4 2021

The 10 Providers That Matter Most And How They  
Stack Up

November 15, 2021

By Katy Tynan with Keith Johnston, Caroline Provost, Christine Turley

FORRESTER®

## Summary

In our 28-criterion evaluation of learning management systems and experience platform providers, we identified the 10 most significant ones — Absorb, Cornerstone, CrossKnowledge, Degreed, Docebo, Meridian, Oracle, SAP, SumTotal, and Workday — and researched, analyzed, and scored them. This report shows how each provider measures up and helps learning professionals select the right one for their needs.

Additional resources are available in the [online version](#) of this report.

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# Evolving Learning Priorities Drive Differentiated Approaches And Capabilities

The learning platform market has undergone significant change in the past decade, reflecting the shifting views that businesses have of how learning supports strategy. Early iterations existed primarily to deliver and track compliance training. Our last learning technology platform evaluation looked at the combined functionality of learning and performance management. The market had evolved to become part of the HR/human capital management (HCM) technology ecosystem, with a focus on performance and skills development. Since then, the market has evolved beyond the HR use case, as learning has become a powerful tool to support critical business priorities such as: enabling innovation, facilitating continuous transformation, extending learning beyond the enterprise boundaries, optimizing employee experience (EX), and building the future workforce.

To help customers achieve those goals, learning platform providers have had to rapidly evolve their vision, strategy, and capabilities. Forward-thinking vendors have adapted both their messaging and platform capabilities to encompass key elements that lead to a more embedded, outcomes-oriented approach to learning. As a result of these trends, learning management systems and experience platform customers should look for solutions that are:

- **Grounded in the science of learning.** Decades of research on adult learning theory have been historically underutilized by learning technology providers focused more on the delivery of e-learning content and the simple metrics related to consumption of that content. This approach led to low levels of retention and a gap in application of learning to real-world scenarios. Learning and development professionals increasingly see value in solutions whose designs are grounded in the science of learning and leverage that research to improve learning outcomes.
- **Deeply embedded in the flow of work.** Gone are the days when we could expect employees to go find learning in a destination platform. Learning in the flow of work means incorporating learning activities into common business communication tools such as Teams and Slack as well as just-in-time learning moments as individuals move through their daily activities.
- **Seamlessly integrated across the full spectrum of business technology.** The conversation around measuring learning has moved beyond simple utilization metrics. Leaders want to connect learning investments to business outcomes in a meaningful way. While there are BI tools and external analytics that can pull in data from disparate platforms and perform advanced queries, customers want to be

able to do these things from within the learning platform, too. Visibility into the connection between learning activities and business performance is a key indicator of platform maturity.

## Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our report [Now Tech: Cloud-Based Learning Technology Platforms, Q1 2021](#).

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

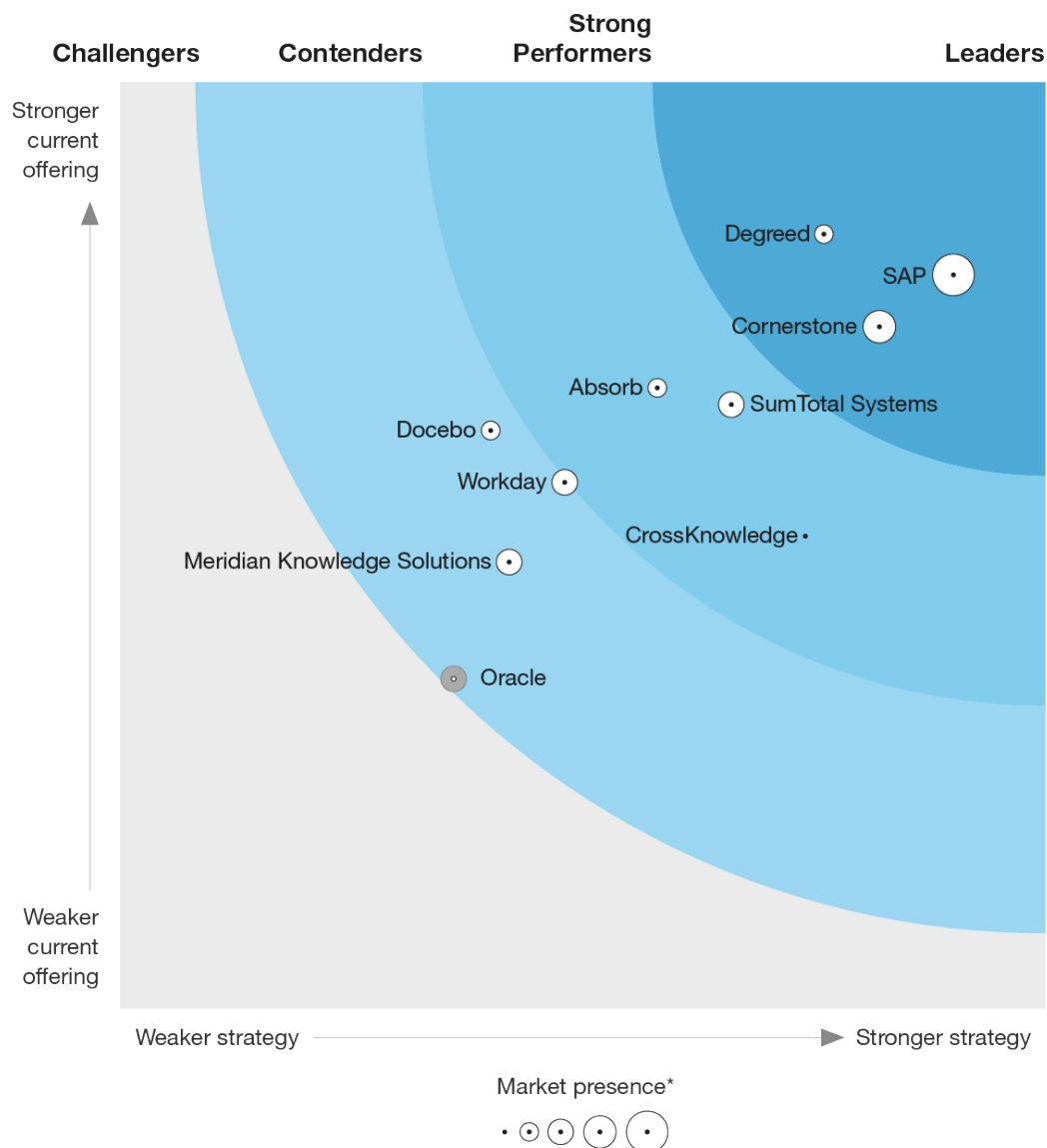
**Figure 1**

The Forrester Wave™: Learning Management Systems And Experience Platforms, Q4 2021

## THE FORRESTER WAVE™

### Learning Management Systems And Experience Platforms

Q4 2021



\*A gray bubble or open dot indicates a nonparticipating vendor.

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**Figure 2**

The Forrester Wave™: Learning Management Systems And Experience Platforms Scorecard, Q4 2021

|                              |     | Forrester's weighting | Absorb | Cornerstone | CrossKnowledge | Degreed | Docebo | Meridian Knowledge Solutions | Oracle* | SAP  | SumTotal Systems | Workday |
|------------------------------|-----|-----------------------|--------|-------------|----------------|---------|--------|------------------------------|---------|------|------------------|---------|
| <b>Current offering</b>      | 50% | 3.35                  | 3.68   | 2.55        | 4.18           | 3.12    | 2.41   | 1.78                         | 3.96    | 3.26 | 2.84             |         |
| Technology                   | 15% | 3.70                  | 2.20   | 3.70        | 4.30           | 3.00    | 3.10   | 2.50                         | 3.70    | 3.10 | 3.50             |         |
| Administrator experience     | 30% | 3.80                  | 4.00   | 3.60        | 3.00           | 2.20    | 3.40   | 2.00                         | 4.20    | 3.80 | 2.60             |         |
| Learner experience           | 30% | 3.00                  | 3.00   | 2.20        | 4.60           | 4.20    | 1.40   | 1.00                         | 3.80    | 3.00 | 2.60             |         |
| Talent ecosystem integration | 25% | 3.00                  | 5.00   | 1.00        | 5.00           | 3.00    | 2.00   | 2.00                         | 4.00    | 3.00 | 3.00             |         |
| <b>Strategy</b>              | 50% | 2.90                  | 4.10   | 3.70        | 3.80           | 2.00    | 2.10   | 1.80                         | 4.50    | 3.30 | 2.40             |         |
| Product vision               | 20% | 3.00                  | 3.00   | 5.00        | 5.00           | 1.00    | 1.00   | 1.00                         | 5.00    | 3.00 | 1.00             |         |
| Innovation roadmap           | 15% | 3.00                  | 3.00   | 5.00        | 3.00           | 3.00    | 1.00   | 1.00                         | 5.00    | 1.00 | 1.00             |         |
| Planned enhancements         | 15% | 3.00                  | 5.00   | 5.00        | 1.00           | 3.00    | 3.00   | 1.00                         | 3.00    | 5.00 | 3.00             |         |
| Execution roadmap            | 10% | 3.00                  | 5.00   | 3.00        | 5.00           | 1.00    | 3.00   | 3.00                         | 5.00    | 3.00 | 3.00             |         |
| Market approach              | 15% | 1.00                  | 5.00   | 3.00        | 5.00           | 1.00    | 5.00   | 3.00                         | 5.00    | 3.00 | 3.00             |         |
| Partner ecosystem            | 15% | 3.00                  | 5.00   | 1.00        | 3.00           | 1.00    | 1.00   | 3.00                         | 5.00    | 5.00 | 5.00             |         |
| Commercial model             | 10% | 5.00                  | 3.00   | 3.00        | 5.00           | 5.00    | 1.00   | 1.00                         | 3.00    | 3.00 | 1.00             |         |
| <b>Market presence</b>       | 0%  | 1.50                  | 4.00   | 1.00        | 2.00           | 2.00    | 3.00   | 3.00                         | 5.00    | 3.00 | 2.50             |         |
| Revenue                      | 50% | 1.00                  | 3.00   | 1.00        | 3.00           | 1.00    | 3.00   | 3.00                         | 5.00    | 3.00 | 3.00             |         |
| Number of customers          | 50% | 2.00                  | 5.00   | 1.00        | 1.00           | 3.00    | 3.00   | 3.00                         | 5.00    | 3.00 | 2.00             |         |

\*Indicates a nonparticipating vendor.

All scores are based on a scale of 0 (weak) to 5 (strong).

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# Vendor Offerings

Forrester included 10 vendors in this assessment: Absorb, Cornerstone, CrossKnowledge, Degreed, Docebo, Meridian, Oracle, SAP, SumTotal, and Workday (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

| Vendor                       | Product evaluated                    | Product version evaluated | Version release date |
|------------------------------|--------------------------------------|---------------------------|----------------------|
| Absorb                       | Absorb LMS                           | N/A                       | 2021                 |
| Cornerstone                  | Cornerstone Learning                 | N/A                       | N/A                  |
| CrossKnowledge               | CrossKnowledge Learning Suite (CKLS) | N/A                       | N/A                  |
| Degreed                      | Degreed                              | N/A                       | N/A                  |
| Docebo                       | Docebo Learning Suite                | N/A                       | July 2021            |
| Meridian Knowledge Solutions | Meridian LMS                         | N/A                       | Spring 2021          |
| Oracle                       | Oracle Learning                      | N/A                       | N/A                  |
| SAP                          | SAP SuccessFactors Learning          | 2105                      | N/A                  |
| SumTotal Systems             | SumTotal Learning Management         | 21.2                      | N/A                  |
| Workday                      | Workday Learning                     | N/A                       | N/A                  |

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## Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

### Leaders

- **SAP grounds a robust product in the science of learning.** Founded in 2001 and based in San Francisco, CA, SuccessFactors was an early player in the talent development space. Acquired by SAP in 2011, SuccessFactors has continued to grow through both investment and acquisition. SuccessFactors is a powerhouse from a resources perspective. In-house research capabilities drive its vision and strategy, and it brings a balanced focus to offering in-suite capabilities and integration beyond HCM into business at all levels. It strongly emphasizes the science of learning and seeks to provide value to learners, administrators, facilitators, and the business. This holistic approach, leveraging the full power of the integrated SAP SuccessFactors suite along with prebuilt integrations with best-

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in-class solutions, positions it well as organizations seek to connect learning with business outcomes. SAP's strongest play is in the enterprise market. While its recent incorporation of Litmos into the overall SuccessFactors portfolio provides a solution for the midmarket (and also augments its extended enterprise capabilities), it needs to remain wary of best-in-class challengers. SuccessFactors has a rich set of capabilities to support learners, administrators, and facilitators. Strong personalization capabilities and rich integration create a balance between administrator needs and learner experience. Reference customers report that it requires a significant level of administrative knowledge to configure and deliver the learning solution for maximum benefit, however, they value the customizability and support for complex use cases. SuccessFactors is a strong fit for enterprise buyers looking for a solution that connects learning to business outcomes, provides robust integration, and has a strategy grounded in learning science.

- **Degreed offers a strong, differentiated vision for the future**

**of learning.** Headquartered in Pleasanton, CA, and founded in 2012, Degreed was one of the first products to define the learner experience platform (LXP) concept and approach, focusing on aggregating content from a variety of sources and taking a learner-first approach. Degreed's strategy has evolved in recent years, both because of changing demands from customers and investments in expanded functionality. Degreed is investing in adding select learning management system (LMS) functionality while doubling down on its commitment to bring opportunities to "learn by doing" and "signals" about learning from all parts of the work ecosystem to craft the learner experience and provide robust workforce data to the employer. Degreed's approach to delivering learning differs from the other players in the market, and its value is dependent on other parts of the ecosystem and successfully integrating all of those elements for a cohesive experience. Degreed's user interface is a strength, as is its ability to bring together data and analytics from many sources. Because of its unique approach to the market, Degreed lags in some capabilities that other platforms offer, such as advanced extended enterprise functionality including e-commerce. Reference customers, who are accustomed to a traditional learning platform model, don't feel like they are yet getting the full value out of the platform, as the functionality differs from their existing approaches to delivering learning content. Degreed works best for organizations that understand and can leverage the power of a fully integrated analytics and content ecosystem. Companies that invest in a variety of skills development platforms and place a strong focus on skills and career development will find Degreed a robust solution that is not limited by prioritizing any one vendor.

- **Cornerstone builds on a strong legacy with investments in experience and integration.** Based in Santa Monica, California, Cornerstone was founded in 1999. Its product has evolved from a learning platform to one that provides a variety of talent management functions but stops short of becoming a full-stack HCM solution. Cornerstone has been a significant player in the learning and talent market, with a long history of serving complex, global organizations. While the vision of integrated talent management is appealing to an HR audience, learning is a strategic priority across organizations, and Cornerstone will need to ensure that its offering speaks to that buyer demand. Cornerstone's acquisition of Saba and its upcoming talent marketplace release are important investments to stay competitive with challengers from both suite and point providers. Best-in-class challengers are pushing the innovation boundaries for Cornerstone, while full-stack HCM vendors are making a strong case for the value of the suite. Cornerstone is responding with significant investments in its user experience as well as a strong focus on integration across the enterprise technology stack. Cornerstone's current solution offers rich functionality to support a wide variety of learning use cases from compliance to career development to extended enterprise and beyond. Its support for competency models and skills management is a strong differentiator, as is its content authoring capabilities. However, the overall UI is not as strong as others in the market, and reference customers want a more intuitive administrator experience. Cornerstone is a strong choice for organizations that seek a robust, integrated talent solution with a clear understanding of the needs of the learning leader as a buyer.

## Strong Performers

- **SumTotal looks to refresh its market positioning and respond to new buyer priorities.** Based in Gainesville, Florida, SumTotal was founded in 1985. It was acquired by Skillsoft in 2014, which acquired Global Knowledge in 2021, bringing together three learning brands under one umbrella. SumTotal's recent vision messaging refresh looks to reposition its solution as a learning management experience platform (LMXP), combining the capabilities of a full-service learning management platform with LXP functionality. A talent development suite is valuable to HR and talent but less appealing when selling to extended enterprise or into lines of business, so the new vision seeks to align its solution with a more current view of customer demands. Its LXP strategy blends learner-centric recommendations with learning in the flow of work. With organizations either looking to leverage a single suite for all HCM functions or taking a best-of-breed approach, SumTotal's current offering falls somewhere in between, and risks being perceived as neither. SumTotal's current solution offers a refreshed user

experience as a result of recent investments in the interface for both learners and administrators, and it is committed to the concept of being a talent suite as a differentiator. Reference customers see value in robust reporting but would like to see a more seamless content integration experience. Being part of the Skillsoft organization gives them some advantages in offering a one-stop shop for talent management technology and content. As part of a collection of learning tools that includes Skillsoft and Global Knowledge, SumTotal has the potential to provide strong value for buyers who want to leverage integration between these tools.

- **CrossKnowledge puts learners at the center but is catching up on some key capabilities.** Founded in 2000 and based in Paris, France, CrossKnowledge is a standalone learning platform with a strong emphasis on connecting learning with business outcomes. CrossKnowledge focuses on providing a balanced solution for large, global enterprises that supports learners, administrators, and facilitators. It has a clear vision of connecting learning to business outcomes and a strong experience for learners, administrators, and facilitators. As with other standalone learning platforms, CrossKnowledge must pay close attention to the suite vendors, as buyers looking to consolidate platforms may see increased potential for their HCM or talent suite to meet their learning needs. CrossKnowledge has a comprehensive, deeply customizable offering that supports the needs of learners, administrators, and facilitators alike. Its current offering strength is its focus on facilitators and a blended learning experience, as well as an engaging, customizable user interface. It has robust support for a wide variety of use cases, both for internal employees and extended enterprise. CrossKnowledge prioritizes a heavy focus on learner experience. This has left the platform behind on assessments and skills ontologies. Reference customers see its authoring tools and social learning capabilities as important differentiators but report challenges with integrating the solution with other tools. CrossKnowledge is a strong option for organizations that want to focus on learner experience in a variety of use cases both within and beyond the talent lifecycle.
- **Absorb offers a strong experience but must advance its HR and partner ecosystem.** Based in Calgary, Canada, Absorb is a cloud-native learning platform founded in 2002 that delivers learning solutions for internal and extended enterprise. It was acquired by private equity firm Welsh, Carson, Anderson & Stowe in April of 2021. Absorb is a dedicated learning platform that provides a learner-centric model supporting both corporate learning and extended enterprise functionality. Its “Learn Everywhere” vision is designed to expand beyond the LMS as a destination and embed learning into all aspects of work, an approach that is well-aligned with customer and market demands. This strategy encompasses the

entire organization from HR needs through extended enterprise. As Absorb looks to move upmarket and become a primary learning platform for larger enterprises, it needs to continue to build up its HCM integration capabilities and expand its partner ecosystem. Absorb's extended enterprise capability is a strength in the market, and its Infuse product, which allows learning to be embedded into other applications, is a significant differentiator. As a standalone learning solution, Absorb is dependent on integrations with other tools and solutions in order to provide a fully integrated view of learning across the ecosystem. While Absorb has recently invested in more advanced integration with core HCM vendors, customers will have to do some significant work to have full visibility into data across the organization. Reference customers see its extended enterprise capabilities as an important differentiator. Absorb has a strong legacy of supporting midmarket and line-of-business enterprise functionality, with a particular strength in extended enterprise.

## Contenders

- **Workday has solid in-suite functionality but a limited learning vision.** Based in Pleasanton, California, Workday was founded in 2005. It offers a full-stack cloud HCM product that aims to provide a learning solution that takes advantage of the integration of all talent functions in one centralized solution. Workday came into the market as a challenger to legacy HCM platforms. While Workday's recent investments in Skills Cloud and its learner interface are positioning it to better compete, its primary focus on supporting the talent lifecycle lags other products that take a more holistic view of learning as a driver of organizational performance. Workday launched a learning solution in 2016 and introduced Skills Cloud in 2018, which marked an evolution in its support of performance management to embrace learning more fully. Its solution supports complex learning scenarios, and it has recently invested heavily in its user experience. While Workday learning provides a solid end-user experience (a result of recent investments in these capabilities) and robust analytics within the HCM suite, the solution overall lacks advanced functionality in the realms of assessment, social learning, and extended enterprise capabilities. Reference customers primarily leverage the solution for mandatory training use and skills development and are not typically extending beyond core talent and performance management use cases. Workday provides the most value to those who use Workday's full suite of talent capabilities rather than those who select best-of-breed solutions (the learning product is only available to those who purchase the full HCM suite).
- **Docebo's vision challenges legacy providers but must strengthen core analytics.** Headquartered in Toronto, Canada, Docebo was founded in 2005 and

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is a dedicated learning solution provider. It has emerged as a challenger to more established learning platforms, focusing on learning beyond the core HR use case. The strength of Docebo's strategy is its strong focus on connecting learning with business outcomes. It takes a non-HR driven approach to learning, working within lines of business to provide both internal and extended enterprise functionality. This focus on integrating business KPIs is a competitive differentiator. Focusing outside of HR has both pros and cons. Organizations are increasingly looking to bring together data across the HR technology ecosystem to better understand talent. The lack of core analytics hinders Docebo's ability to meet customer demand related to workforce analytics. Docebo's business outcome focus has led them to develop some unique capabilities that integrate with other parts of the work tech ecosystem and provide more robust KPIs that go beyond usage and completion dashboards. The strength of its current offering lies in its ability to personalize the learner experience as well as connect learning to performance. As a standalone learning solution, Docebo is dependent on integrations with other tools and solutions in order to provide a fully integrated view of talent across the ecosystem. Reference customers highly value Docebo's extended enterprise capabilities but are hoping for more robust administrative and reporting capabilities as the product evolves. Docebo is a good choice for organizations that prioritize both internal and extended enterprise use cases, with a strong focus on learner experience and a goal of connecting learning to business outcomes.

- **Meridian keeps its focus on the needs of specific markets.** Based in Reston, Virginia, Meridian Knowledge Solutions is an enterprise-focused learning platform that has been providing solutions for government and large commercial enterprises since 1997. Meridian's vision is grounded in a strong focus on the needs of large enterprise and regulated industries, especially the US government. Meridian focuses on organizational, line-of-business, and employee-led learning not driven by HR or the talent lifecycle. It has an equal focus on internal employees and extended enterprise and a significant investment in interoperability through xAPI integrations. This strategy gives them strong capabilities to integrate across a variety of business tools. But its lack of focus on HR integration may be an obstacle to Meridian's ability to sell into organizations that are looking to fully integrate their workforce analytics. Meridian's robust permissions and enterprise-level administrative tools are a key strength for its large market customer strategy. However, the administrative capabilities come at the expense of learner customization and user interface. Meridian's interface is not as visually engaging or as customizable as other players in the market. Reference customers value Meridian's focus and understanding of their unique needs and the way the

platform supports compliance and complex curriculum capabilities. However, those customers would like to see a more intuitive user interface and more customization options for learners. Meridian is a strong fit for US Federal government agencies due to its continued investment in the FedRAMP and is also a good choice for large commercial organizations that need robust enterprise functionality.

- **Oracle covers the basics for suite customers but lags the capabilities of market leaders.** Based in Austin, Texas, Oracle has been a player in the enterprise resource planning (ERP) space for decades. The company began an expansion of its talent capabilities in 2004 with an acquisition of PeopleSoft and expanded its focus in 2012 with an acquisition of Taleo. It launched a learning cloud product in 2015 and is now considered a full-stack cloud HCM solution provider. Oracle's main strategic value proposition is to support the full stack of capabilities that enterprise customers are looking for within its suite. Oracle's learning suite is sufficiently robust from a feature and functionality perspective to meet the needs of Oracle's current customer base. However, Oracle's destination learning platform strategy is behind in the market. Oracle's current offering supports integration of all types of learning content and a robust platform; however, it lags the market in content authoring capabilities and social learning functionality. For organizations that have invested in Oracle's HCM suite, leveraging its learning solution makes sense, as it has solid integration and all the foundational functionality you would expect from a modern learning platform. Oracle is not on the bleeding edge from an innovation and functionality perspective, but the platform is robust and provides Oracle suite users with integrated learning capabilities (the learning product is only available to those who purchase the full HCM suite). Oracle declined to participate in the full Forrester Wave evaluation process; this assessment is based on publicly available information.

## Evaluation Overview

We evaluated vendors against 28 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include the overall technology platform capabilities, the administrative experience, and the learner experience.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each vendor's vision in context with the trends outlined

above, as well as their roadmaps and partnership ecosystems.

- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's overall learning revenue, as well as the number of customers they have on the platform.

## Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: Absorb, Cornerstone, CrossKnowledge, Degreed, Docebo, Meridian, Oracle, SAP, SumTotal, and Workday. Each of these vendors has:

- A primary market of corporate learning solutions (>50% of revenue from clients that are not in K12 or higher education and more than \$50 million).
- A cloud-based platform.
- A solution that is primarily a platform and does not include a significant amount of content.
- A significant number of enterprise customers similar in profile to Forrester clients.

## Supplemental Material

### Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

### The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

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