

CORPORATE LEARNING BRANDS:

It's 2018 and It's Time to Step Up



“As you’re reading this report, ask yourself what it would be like to work with a world-class advertising agency that also happens to know your industry this well.”



Dear Reader:

The Starr Conspiracy is an advertising agency. Our 60-person company works primarily with human capital management (HCM) software companies, but also works with a wide range of other B2B enterprise software and services companies in areas like fintech, business intelligence, collaboration, data, and more.

The primary services we deliver to clients are **Strategic Consulting, Market Research, Message Development, Brand Creation, Advertising, and Marketing**. Our agency is composed of an innovative digital marketing group, an award-winning creative agency, and an influential team of about a dozen industry analysts who infuse our clients’ marketing strategies with deep industry insights.

Our reports (like the one you’re about to read) are read by tens of thousands of people around the world. They’re so widely read, in fact, that we’re sometimes mistaken for an analyst group like Gartner, Forrester, or IDC.

And though it’s true that our analysts at The Starr Conspiracy are renowned for spotting industry trends and identifying category winners, we are not an analyst firm. *In other words, we do not work with companies to help them select and implement the “right” enterprise software and services.*

We work exclusively with enterprise software and services vendors to help them position their wares in the marketplace, build dominant brand recognition, and generate demand.

As you’re reading this report, ask yourself what it would be like to work with a world-class advertising agency that also happens to know your industry *this* well. Would our strategies be more effective? Would our messages be more compelling? Would our brands be more differentiated? Would our campaigns build more brand recognition and drive more leads?

Since 1999, we have demonstrated the power of infusing award-winning marketing with deep industry expertise by helping company after company achieve market leadership in their segment. *When you work with The Starr Conspiracy, it’s like you’re working with a Madison Avenue advertising agency, a hot-shot digital group, and a Silicon Valley analyst all at the same time.*

If your enterprise software or services company could benefit from working with a marketing agency that doesn’t need to be “ramped up” on your industry, please give us a call.

Thank you for reading this report. And thank you for your consideration of The Starr Conspiracy.

Sincerely,

Bref Starr
Founder and CEO
The Starr Conspiracy

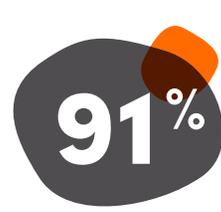
P.S. If you would like to get to know The Starr Conspiracy, then we would like to get to know you. The best place to start is a 30-minute phone call with one of our sales directors. To schedule an appointment, call 817-204-0400 or email info@thestarrconspiracy.com and we will promptly schedule an introductory call.



Dear Learning Vendors, Your Lunch Is Being Eaten

Consider this a brand intervention. Like all good interventions, this is coming from a place of love. We believe in you and what you can accomplish. We know your mission and that what you're trying to do is important. We are your friend and ally. **But you really need to get your shit together.**

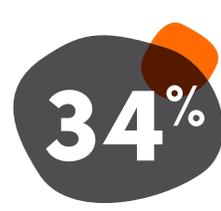
Let's take a look at some of the key numbers from our [2017 Enterprise Learning Buyer](#) report and see if you notice the same causes for concern:



*buyers excited by
new innovations
in technology*



*buyers looking to
complement, not
replace, existing
technology*



*buyers who believe
traditional learning
can adapt to
new demands*



*the average NPS
score for current
learning technology*



The learning category is going through a massive upheaval.

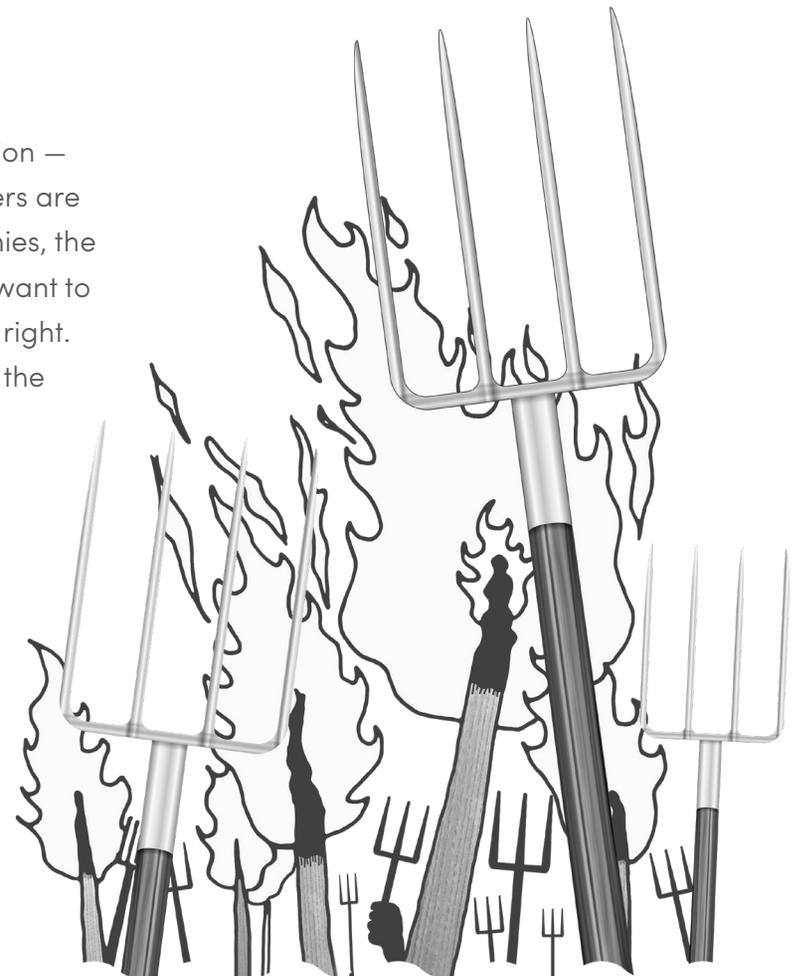
Buyers want new innovations and they don't want to rip and replace (this is known as having your cake and eating it, too). But — and that's a big but — they don't believe they can get this from traditional vendors. Their dissatisfaction has also continued to grow — aggregate NPS scores have gone in the wrong direction by 23 points since our 2014 report, which was already pretty terrible.

Here's what we do know: Some companies seen as traditional players are doing really innovative things. Unfortunately for them and the new entrants to the category, they are getting dragged for a category reputation of software that's been a step behind market needs.

This is a matter of marketing efficiency and effectiveness — not necessarily product shortcomings. No enterprise software and services category suffers long for vendors with muddled and tepid brands. Today, corporate learning is at that point.

It's time to be bold.

We're in an era of genuine innovation — and buyers, businesses, and learners are begging for it. Beyond just companies, the world needs what you've got. You want to get this right. We want you to get it right. Let's start by understanding where the market is going.





The Future of Corporate Learning

Here's the only certainty about corporate learning: Compliance-driven learning is going to be around for a long, long time.

Companies like **Thomson Reuters** and **NAVEX Global** will continue doing business with L&D and legal departments for the foreseeable future. It's time to stop talking about whether we're going to get away from the need for this functionality. From the increased emphasis on diversity and harassment in the U.S., to new laws like General Data Protection Regulation (GDPR) in the EU, companies will need to lean on learning even more to ensure that they get compliance right.

Outside of that certainty, we see some strong bets about what the future of corporate learning will look like:

- **PEOPLE-CENTRIC DESIGN WILL FINALLY PREVAIL.**

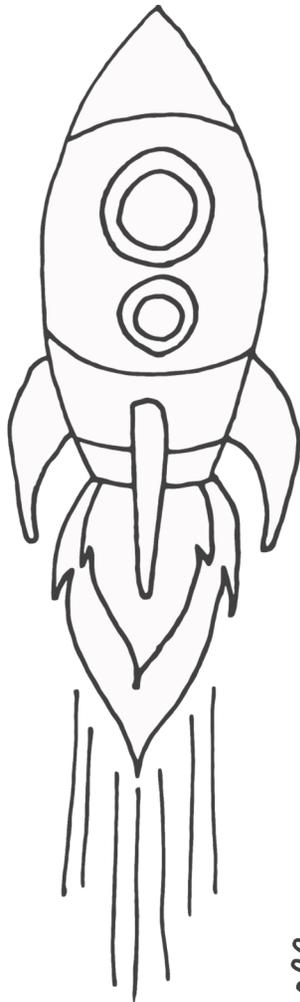
Everyone is a learner. Full stop. The best learning systems going forward will be oriented around how people work and what people need — not just at work, but as people. This will impact design, technology, content, collaboration, and experience. **mLevel** and **GamEffective** have pushed the envelope on gamified microlearning. Companies like **Rallyware** and **Launchfire** have pushed Netflix-like learning experiences to employees. Corporate learning has been notorious for buying systems that are solely designed to meet their needs with little to no input from the people who will use it. That's simply an unacceptable approach at this point.

- **THE ENTERPRISE FINDS A WAY TO TRULY VALIDATE PEER-TO-PEER CONTENT.**

You can go onto YouTube and find a "how to" video on anything, and if there isn't one, you can create one with hardware you already own. Peer-to-peer content is great, but is the content any good? Companies like **Versal** and even big players like **Saba** are trying to formalize this within software. The future of learning will have to design systems of validating knowledge and adapt to the ways we are sharing it.

- **SOFTWARE WILL NOT HAVE EATEN EVERYTHING.**

Services and training will still matter. We're learning that you can over-automate certain parts of L&D. Trainers — our word for teachers who focus on adults — may have fallen out of fashion for a time, but they're still the best choice for some subject matter: soft skills, leadership, effective decision-making, and other broad subjects. Learning has been a tough category to measure and understand because there are so many small training companies that focus on small niches. That said, companies like **Fierce** and **Mind Gym** have bold messaging and branding that help them stand out in a crowded market. Meanwhile, companies with a long history in the space like **Pearson** continue to find ways to scale their learning and development programs for companies that don't want or need services or heavy customization.



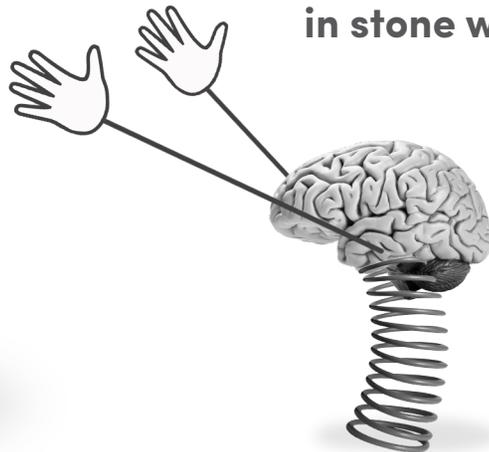
● **LEARNING WILL HAVE EXPANDED.**

Learning can be incorporated into almost any part of work, especially the performance support variety or peer-driven learning and engagement. Companies like **Peakon** and **Emplify** expand what it means to be a learning vendor in this new world of work. It's also expanded within the whole of HCM – with learning buyers continuing to influence and even drive certain talent technology buys. For some organizations, learning is the center of the talent universe – driving performance, engagement, and more.

● **LEARNING WILL HAVE SHRUNK.**

The problem is, learning is also shrinking in certain ways. Collaboration software is outmanning learning providers and is now predominantly how casual and peer-driven learning is taking place. The best learning content in your organization might be stuck in places like **Slack**, **Microsoft Teams**, and even **G Suite by Google**. Traditional classroom-based and live e-learning courses are falling out of style. Some engagement, performance, and onboarding systems like **Engagedly** or **HighGround** take capabilities from learning systems and make them their own.

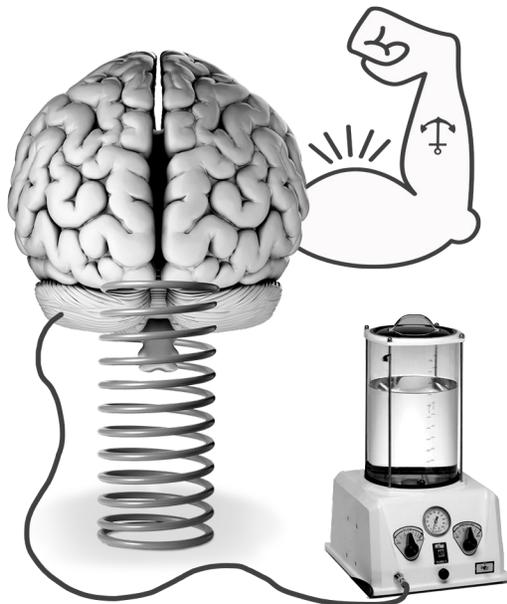
Those last two bullet points are a real issue. For the first time, the boundaries of what makes a company a learning provider are unclear. **Companies that wait for this definition to be set in stone will already be far behind.**





Where Do Big Legacy Learning and Development Brands Go?

The big question on everyone's minds is how do the biggest legacy brands in learning evolve to meet the trends in place.



LEADERS

- **Cornerstone OnDemand** — Cornerstone OnDemand is still a functional leader in this category, even as everyone in this category — Cornerstone included — is shifting to offer more integrated talent management solutions. Its partner ecosystem is deep, with companies like **Tribridge**, **Bluewater**, and **Appirio** driving innovation on the platform. The platform approach gives true believers in learning the resources to evolve and stay ahead of the market, if that's what they need.
- **Saba** — With Saba's acquisition of **Halogen**, Saba has solutions that traverse most of the talent management functionality and spread from the midmarket through the enterprise. That said, Saba's heritage is still learning, where it continues to be a leader. Connecting learning directly to engagement and performance is the dream of today's buyer. As a leader, Saba needs to continue to set that pace and ensure that it highlights innovations that keep its clients ahead of the market.
- **SAP SuccessFactors** — When SuccessFactors acquired **Plateau** (and to a lesser extent **Jambok**), it put itself squarely in the learning space. Of the biggest players in the enterprise software space, SAP has done a better job than most at getting HCM and learning under its wing. Its size is also a disadvantage, as it works across a diverse cross-section of clients with broad needs. A developing partner ecosystem will help it stay ahead like Cornerstone, but it's a bit behind — at least for now.



QUESTION MARKS

- **Skillsoft** — We had high hopes for the combination of Skillsoft and **SumTotal**. We still do. The addition of **Percipio**, an intelligent learning platform, brings up more questions than answers — is this to be used in concert with SumTotal? Is this in response to companies not wanting to do a rip and replace for their talent management systems? With **Vodeclis**, that means Skillsoft is trying to tell four different stories with varying levels of overlap. Every company has some wiggle room after a series of acquisitions. It's time for Skillsoft to tell the world who the company is and why it has spread its capabilities out across different platforms.
- **LinkedIn Learning** — LinkedIn Learning is what spun up from its **Lynda** acquisition — a remarkable move in retrospect, given the acquisition by **Microsoft**. The question of LinkedIn Learning isn't if it's going to be successful. It should be. The question is if it can disrupt learning enough to throw the rest of the category into a bit of chaos to LinkedIn's advantage. The combination of learner-led and consumer content is in a place where many people already are — on LinkedIn.

- **Oracle** — Oracle acquired **Taleo's** learning software (which it acquired from **learn.com**) and publicly neglected it in the minds of buyers for a number of years. That's changing and Oracle's really starting to make some noise about what the company has been up to for the past year or two. Now, it really needs to shout it from the rooftops and start killing some FUD that's out in the market. It's an uphill climb, but if anyone can sell a transformation story, it's Oracle.
- **CrossKnowledge** — Similar to Skillsoft, CrossKnowledge is trying to find the balance between telling a technology story versus a learning content story. It also has a pretty significant services and consulting offering that people absolutely still need. The question mark is how does CrossKnowledge stay ahead of a market that's asking for technology solutions but reliant on some soft services that eat into profits when not accounted for? With content becoming ubiquitous, how does it continue to leverage its **Wiley** connection to its advantage?

WHAT'S HAPPENING?

- **IBM** — Another acquisition, this time of **Kenexa**, has moved primarily into a recruiting-driven play for one of the biggest tech companies in the world. Although IBM has its own set of issues as it grapples with the disruption of its business, most of IBM's language and functionality in this area are all about driving engagement along with learning. Again, any serious learning organization in IBM's portfolio will have to supplement its system with additional learning technologies.
- **Workday** — Workday is still the hottest name in HCM, but when you get down to its point solutions in talent management, there are some significant issues to work through. Learning is one of these areas. Its product and messaging seem to be navigating toward where learning was a year or two ago. That may be fine for some on-premise converts who are happy to be present with current-century software, but Workday's buyer demands more robust functionality and appealing messaging. Strong learning environments will have to bolt on to what Workday has done.



Learning Brands to Watch and Learn From

In the past, we've focused on the biggest names in a category. If you want to read about Cornerstone OnDemand, Saba, SAP SuccessFactors, and the rest of the behemoths of learning, they're at the end of the last section if you skipped ahead to here.

For this report, we really wanted to focus on 13 brands that are making interesting plays in the market or have a unique position.

Some are new, some aren't. It's not a comprehensive list, of course. But this list represents the variety of interesting products that come to learning in a different way, but still often have similar struggles trying to convey their message, build a brand that stands out, and get their message and brand in front of the right audience — an audience that changes as fast as the expectations for learning software.

LEARNING BRAND TRENDS

Here are some of the marketing trends we see across the entire learning category:

- **Plant your flag and defend it boldly.** This is a category that needs leaders to proclaim a unique position loudly and clearly. When you try to appeal to everyone, you win with no one. Learning is full of “us too” messages — and look, not everyone can *transform* learning. At least find a different synonym, folks.
- **Leverage your brand.** For companies transitioning from higher ed to corporate learning, you have a strong brand not just with educators but with learners. Many of those learners who used these systems in school are now buyers and influencers of learning systems. So why aren't you tying your experience more closely to your B2B brand?
- **Stand out.** Learning has suffered under a system of boring branding, even compared with other enterprise software categories. From color selection, to images, to the materials, to the cohesion of all of those elements — learning overall is a trainwreck. But there's good news: A low bar for excellence makes it easy to outshine the competition.
- **Nuanced visuals matter.** You may not think much about typefaces or how you approach gradients, but the market notices it for sure. A few companies have made the choice to own a certain typeface in the market while some color gradients — like an orange-to-pink one we saw frequently — looked too similar and lacked distinction.
- **An uneven presence online.** There are some big brands we evaluated that had some surprising numbers for their web presence. High bounce rates and poor SEO performance can be explained away for a while, but search and website are still the top ways people research learning technology.



What Are We Evaluating?

Whenever we evaluate brands at The Starr Conspiracy, we look at three fundamentals and ask these questions:

MESSAGE

Do you know who your buyer is and are you clearly articulating your messages to them? Do you avoid buzzwords that sound too similar to other competitors? Do you inject personality into your message and writing, or could your messages be written by a robot?

Message clarity

5 is Crater Lake clear, 1 is muddied as a float down the Mississippi

Avoiding buzzwords

5 is thankfully buzzword-free, 1 is a grab bag of phrases everyone uses

Sounding human

5 is completely human, 1 is getting replaced by an AI-powered marketing bot in the near future

BRAND

Does your brand blend into the competitive landscape of your category? Does it have the cohesion necessary to articulate your brand story in a visual way? Do you abuse stock images with smiling, perfect people wearing phone headsets like it's the '90s?

Brand sexiness

5 is supermodel sexy, 1 is an old pair of sweatpants sexy

Brand cohesion

5 is working together like peanut butter and jelly, 1 is working together like peanut butter and anchovies

Stock image use

5 is nearly custom-shoot worthy, 1 is a hopeful stock image parody

PROMOTION

Can people find out who you are online and do you show up in search engines? Do you have earned media reach and get featured at a rate that's appropriate for your size? Do you have a strong media presence across different channels?

Domain authority

5 is the promised land, 1 means you don't exist

Earned media reach

5 is a press-making machine, 1 is not newsworthy

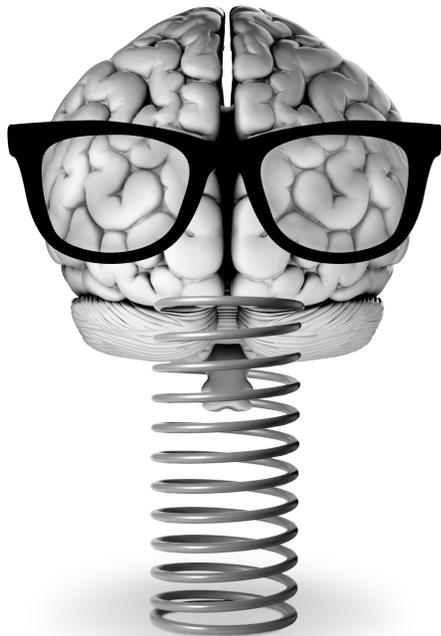
Digital media presence

5 is everywhere that matters, 1 is invisible



13 Learning Brands to Watch and Learn From in 2018

Here's what we know: Everyone has strengths and weaknesses. Some companies clearly get it – but some need work. We don't pull any punches with this: You get the good with the bad and will learn what to do and what to avoid as you're building a brand in the learning space.



Blackboard for Business

Bridge by Instructure

Degreed

edX

Fuse

Grovo

Intrepid Learning

NogginLabs

OpenSesame

Pathgather

Pluralsight

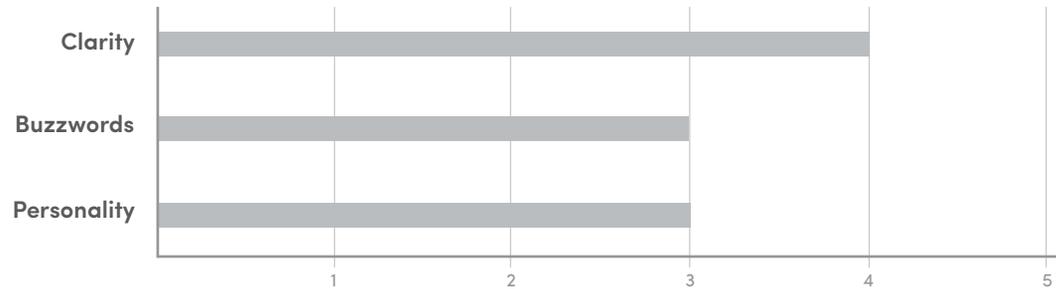
Skilljar

Udemy

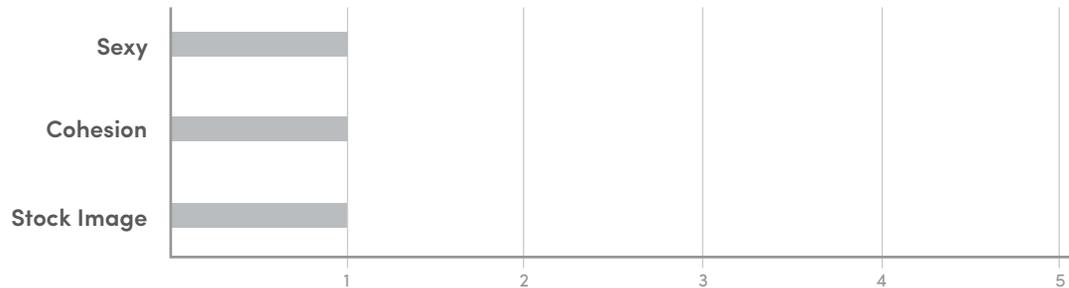


Blackboard for Business

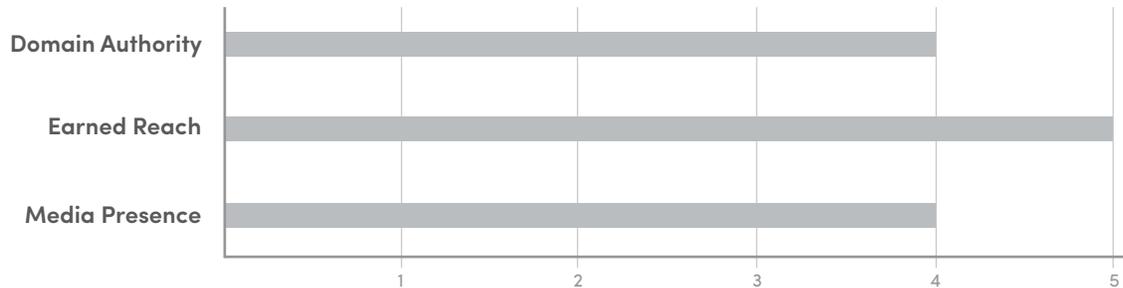
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PROMOTION:

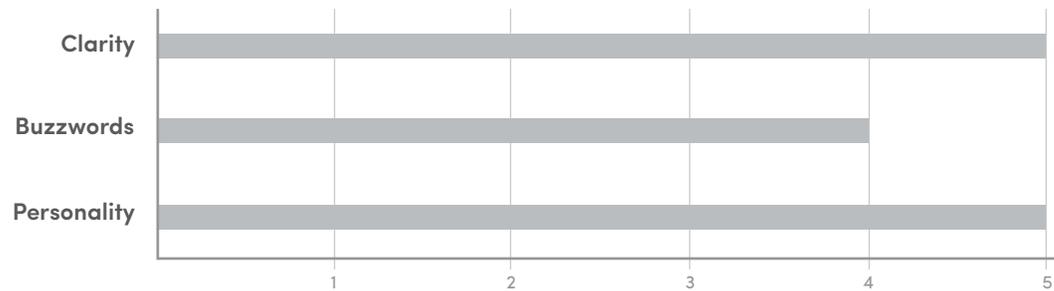


Blackboard has the biggest name in higher ed learning. Unfortunately, it doesn't use that name effectively. Its brand isn't cohesive, rendering it unrecognizable without the logo with generic stock imagery. Its digital presence isn't particularly strong, but it should be. Its message clarity is great, but it could use more of a human touch. There's good and bad news: Millennials are already familiar with the Blackboard brand. Unfortunately, their perceptions may be shaped from functional association with higher education and a previous user experience that doesn't reflect its current state.



Bridge by Instructure

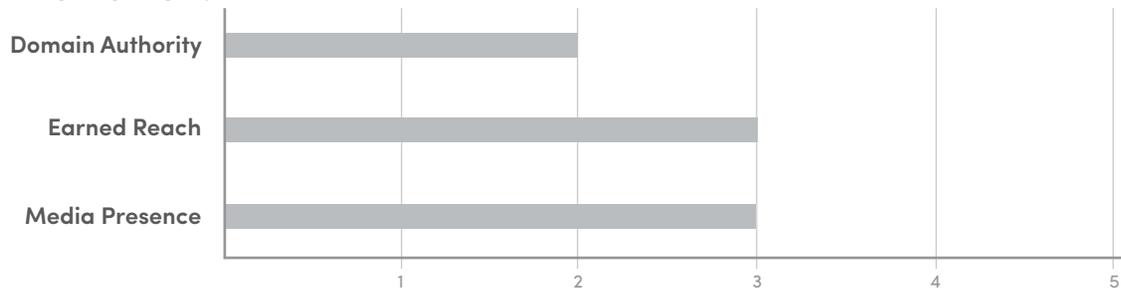
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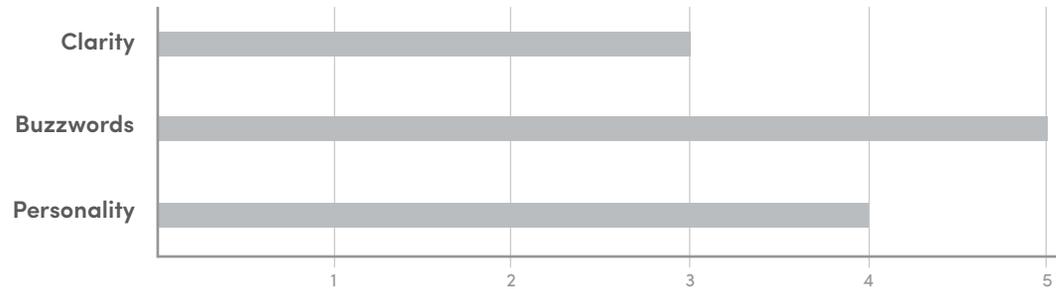


Bridge comes out with a strong learning and performance message that appeals to its radical buyer and a clear endorsed brand architecture. Its visuals are bold and have a point of view, which aligns with its strong tone of voice. But there are some areas for Bridge to improve. The logo, for instance, doesn't mesh with the brand system, and much of the digital promotion it has in the market doesn't align with the current system. Overall, it's taken a thoughtful approach, though.



Degreed

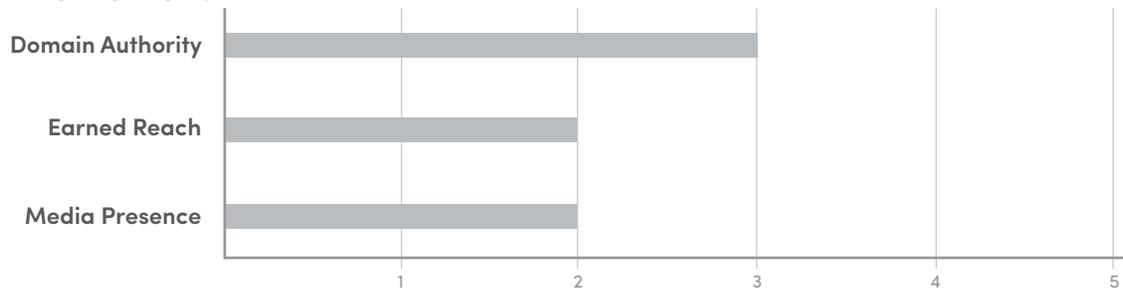
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BRAND:



PROMOTION:

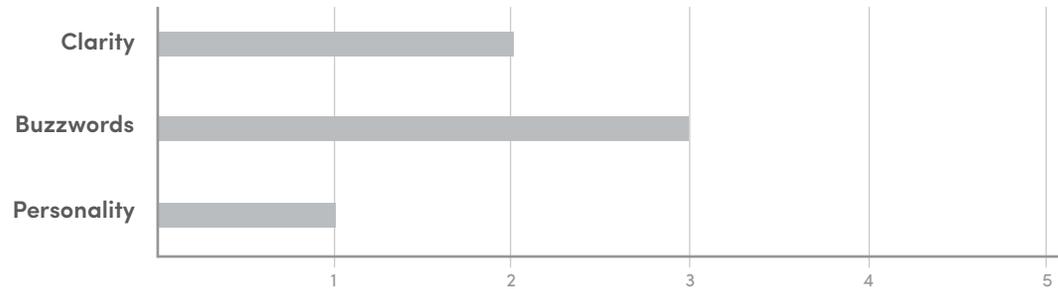


Degreed is hitting all of the right notes with its brand work. It might be partly the lowered expectations of the category, but it's an example of the way things should be done across its visuals. It also does a great job of balancing a consumer and B2B brand. While its message is devoid of buzzwords and robotic engineering that are typical in this space, we do have a suggestion: Clearly articulate to the end buyer what it is you do. We had to dig too far to really understand what the platform does. Prospects aren't always as willing to investigate.

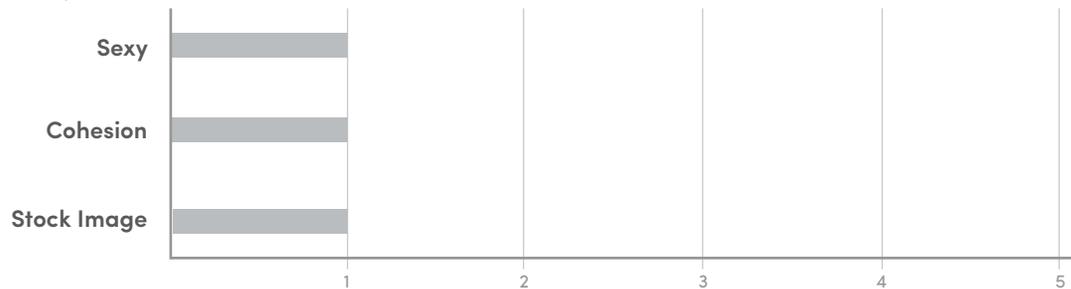


edX

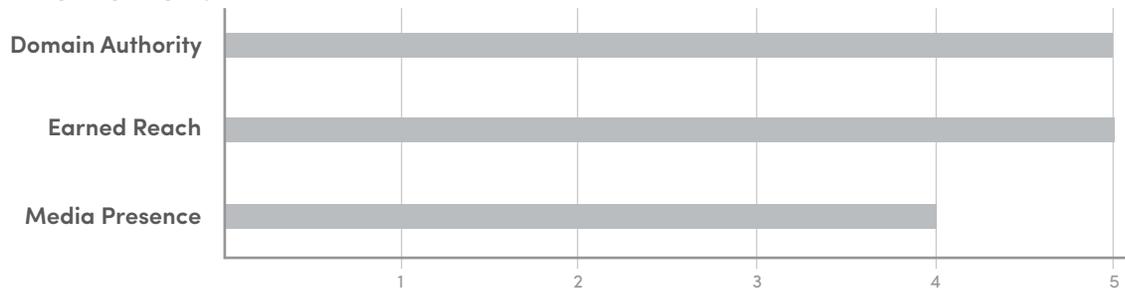
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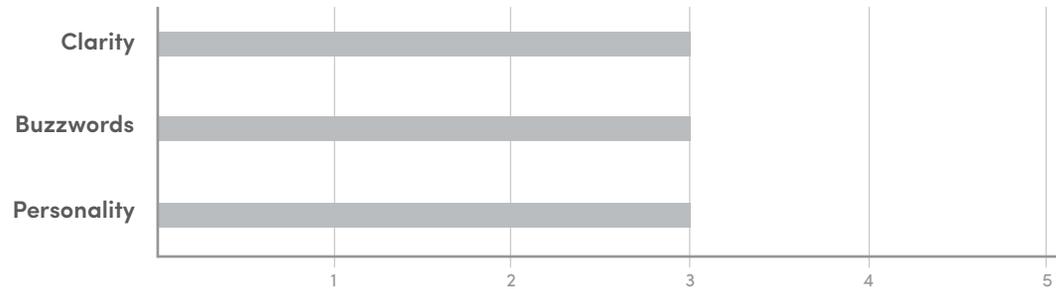


Can we start with the positives? Its web presence and earned reach are outperforming most of the market, even when you account for its other products. It's really difficult moving from higher ed to business, but **edX** doesn't do itself any favors. Its messaging needs some serious sharpening to address the corporate buyer. Its logo is the only positive from its branding work, with an inconsistent application and poor imagery throughout. It's time to address that mess.

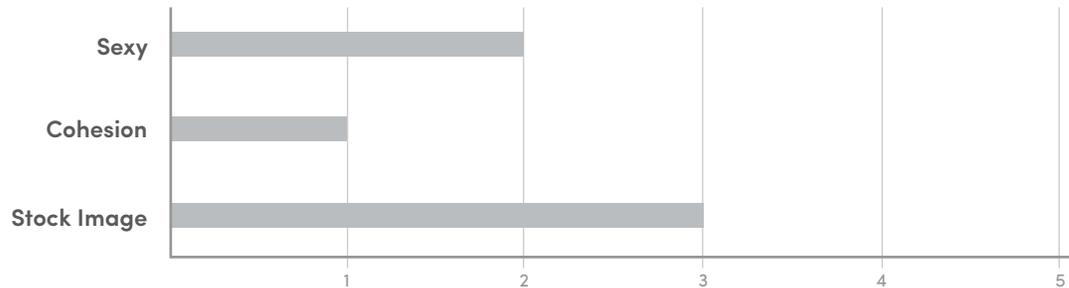


Fuse

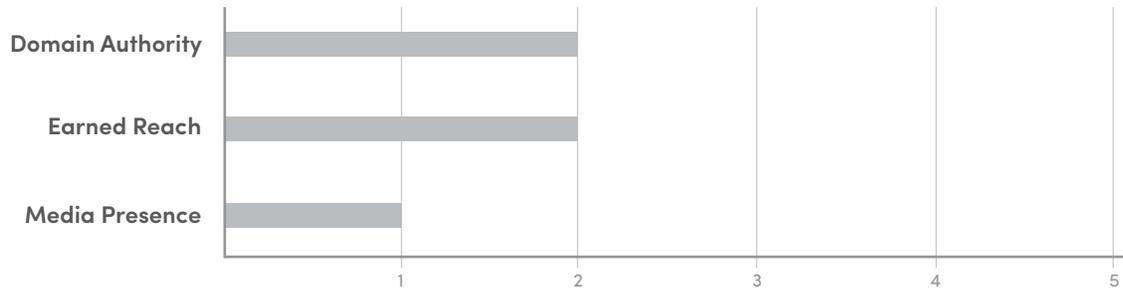
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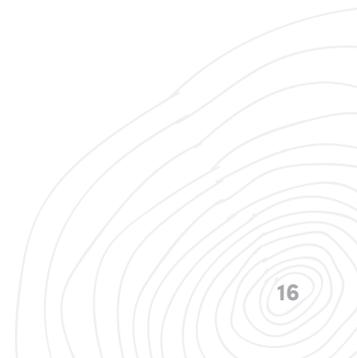
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PROMOTION:



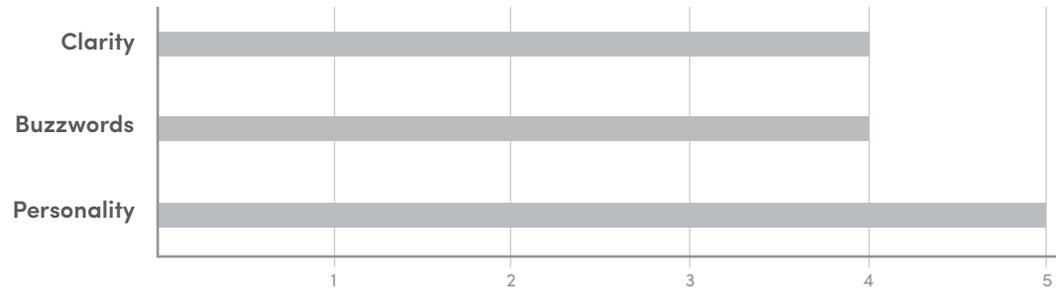
Blasting the world with hot pink and a message of transformation seems like a possible winner, but the devil is in the details. **Fuse's** brand really struggles beyond the color choice, but brand is more than that and it really struggles with consistent application. It's made some good choices in photography, but the custom elements don't care consistently. Its message doesn't feel differentiated enough in a crowded market – it doesn't make us care one way or the other.





Grovo

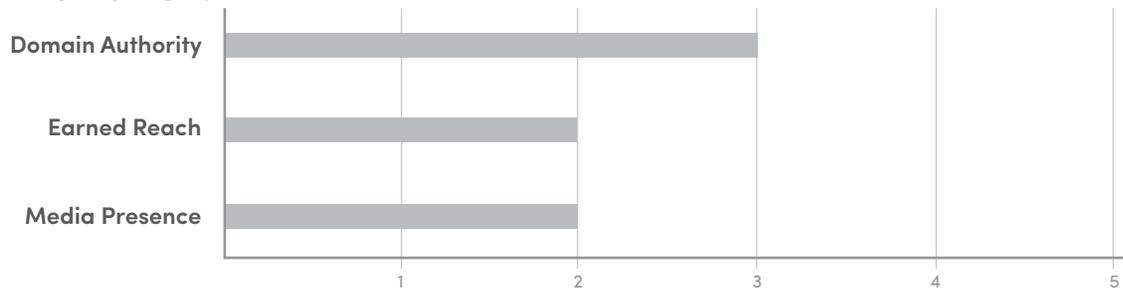
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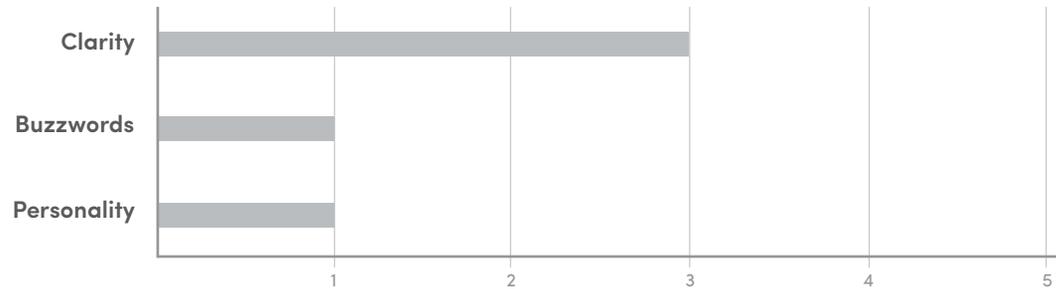


Grovo has an obvious stake in microlearning (it does own the trademark) and its messaging and brand reflect that. It's actually a beautiful and brilliant system that feels cohesive and supports its microlearning message with small elements that add up to a bigger picture. Grovo gets that branding isn't always about a big splash, but a way to communicate succinctly is what makes you unique. We'd definitely swipe right.

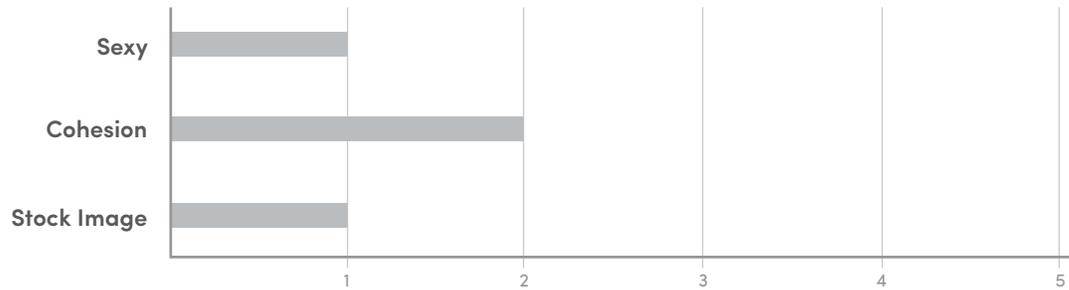


Intrepid Learning

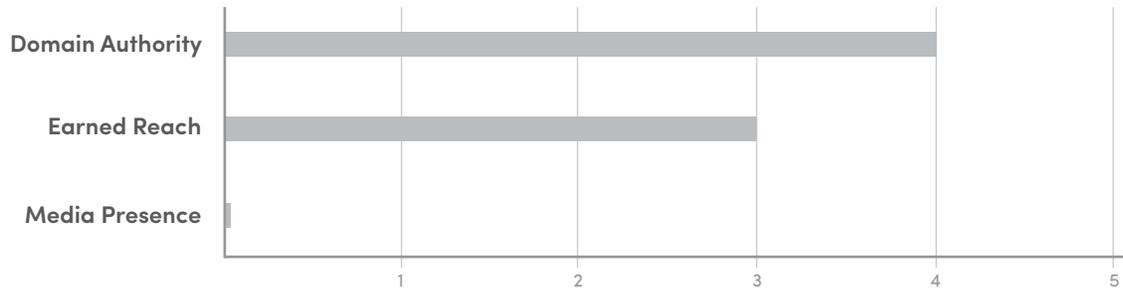
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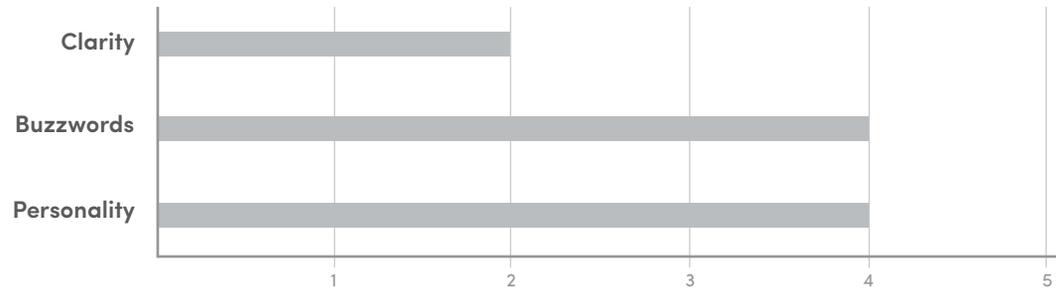


VitalSource entered corporate learning with the purchase of **Intrepid**, but this is a lesson for anyone thinking about acquisition: Planning for brand and message can't be avoided. We're months into 2018, and Intrepid's woefully outdated brand and messaging still exist. We love very little from what Intrepid did and VitalSource shouldn't wait any longer to refresh the brand and message. The only plus – its domain authority – could disappear if it doesn't manage the transition effectively, either.

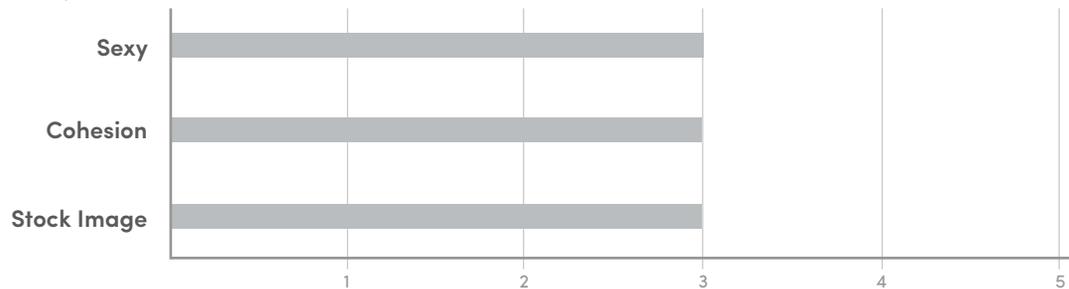


NogginLabs

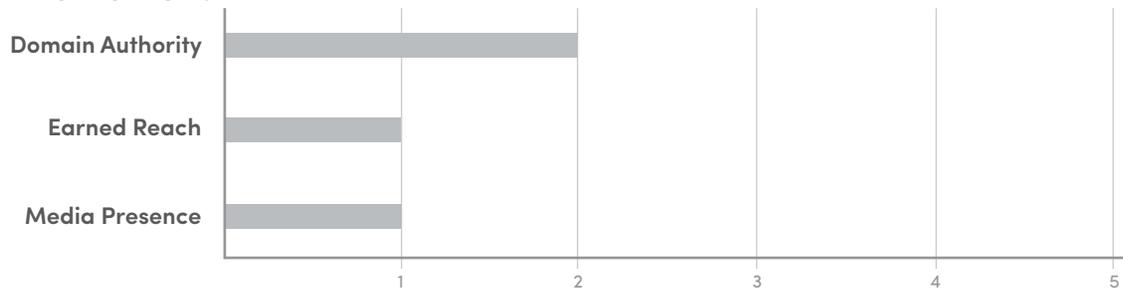
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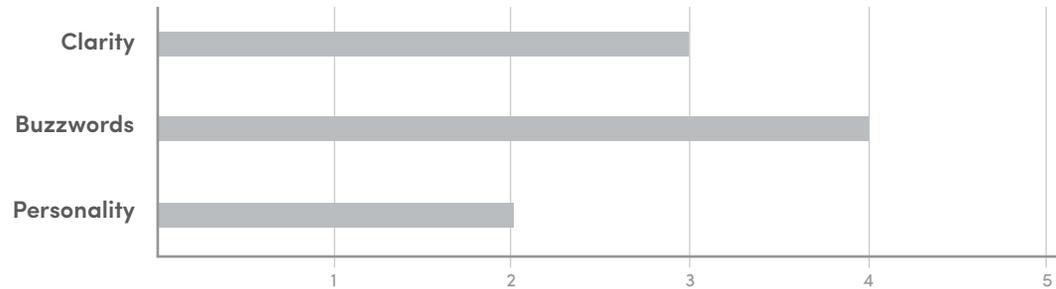


“We make learning that doesn’t make you feel dead.” Pretty bold, right? Too bad the rest of the message is buried under a confusing site design. Although we like leading with examples and case studies, you do need more than that to sell an idea through. Its branding unfortunately takes the same approach, giving prospects a taste of a well-thought-out brand system without ever actually delivering much beyond the – again – super-confusing site. There’s a balance between unique but inaccessible, and boring but accessible.

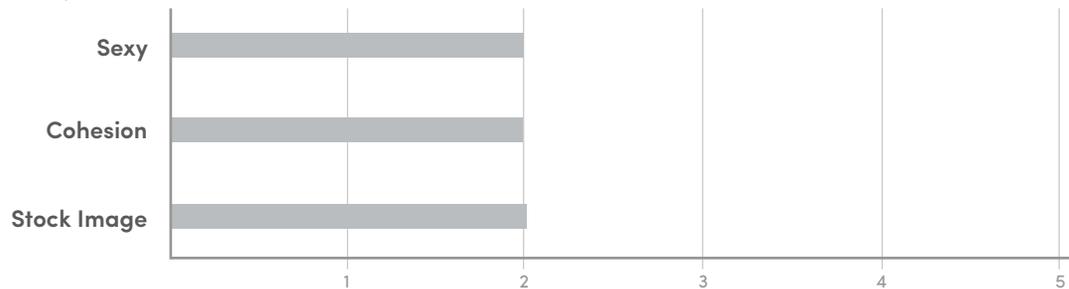


OpenSesame

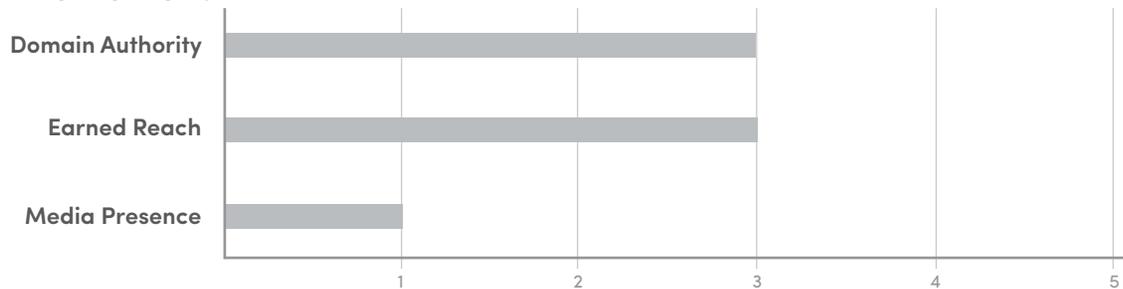
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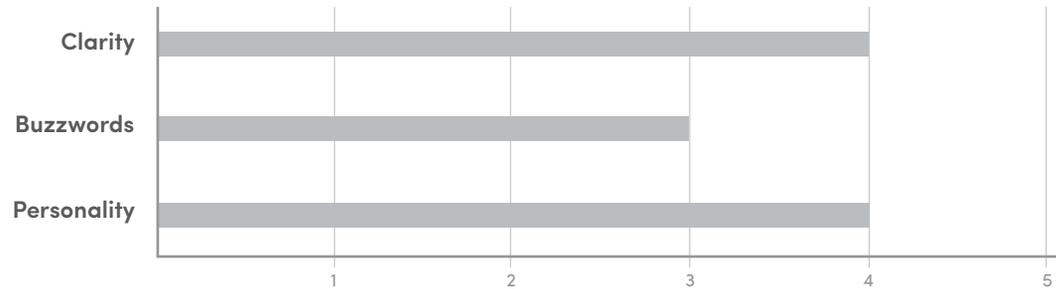


OpenSesame is challenging content leaders like Skillsoft, but its message isn't really challenging the leaders. While it's worked on creating a clear message that avoids buzzwords, its brand needs a little more thought and execution. The orange is a great start, but color and dots don't make a cohesive brand system that stands out. On the really bad side, we've seen some of its stock images in this category quite a bit – OpenSesame hasn't applied a unique treatment to avoid the obvious comparisons. If OpenSesame wants to truly challenge content behemoths, it needs to sharpen its sword.



Pathgather

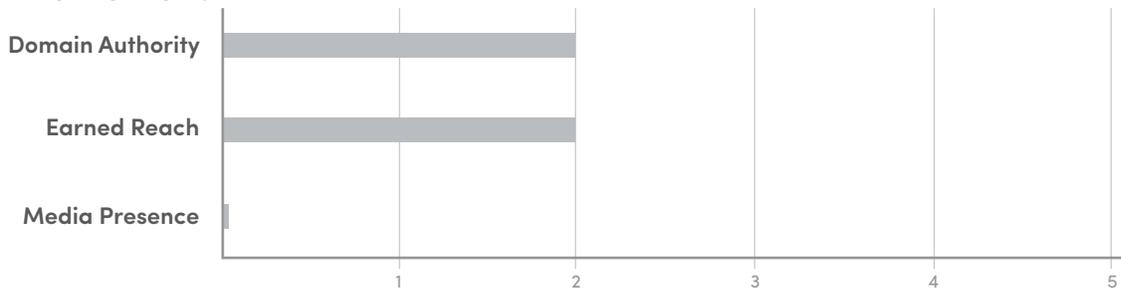
MESSAGE:



BRAND:



PROMOTION:

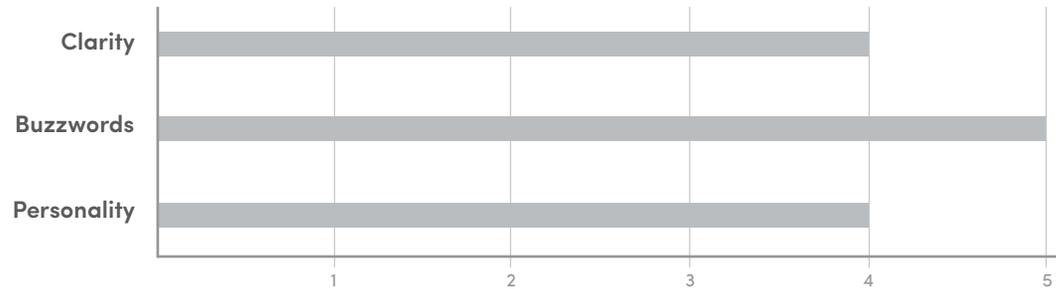


Pathgather is one of the more interesting products in learning, but its messaging feels a little too “us too,” which buries the uniqueness of its product. That said, Pathgather is doing a fairly good job at all of the fundamentals. Its brand system is cohesive and tells a story. It has a personality and it’s simplified its brand and use of stock photos to give a unique feel to the brand. With a little work, it seems like Pathgather could really take a brand leadership position.



Pluralsight

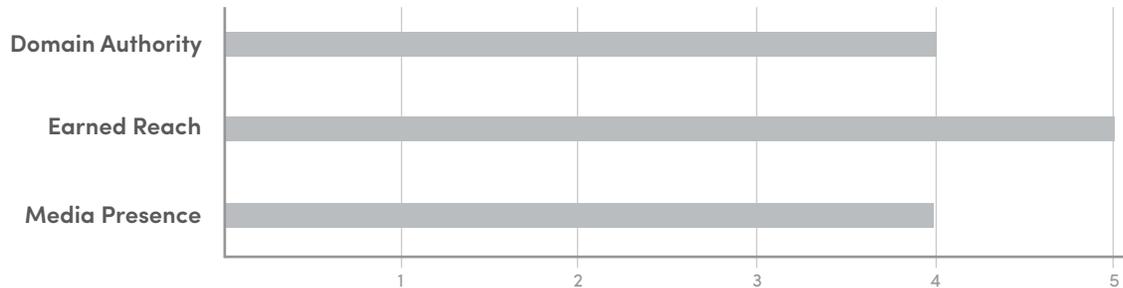
MESSAGE:



BRAND:



PROMOTION:

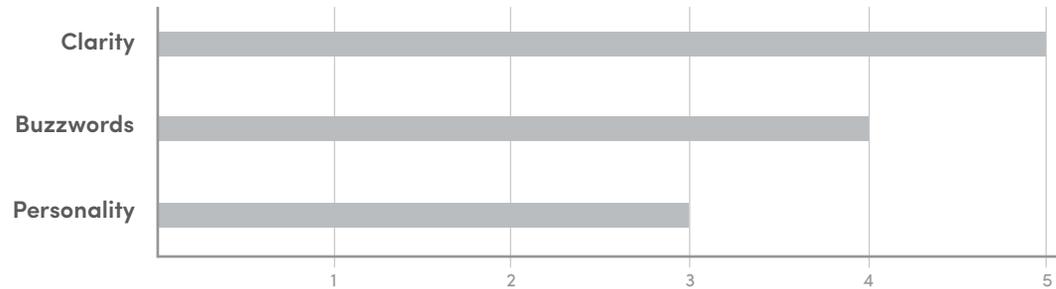


With a strong promotion rating thanks to passionate end users and a message and brand that are a few tweaks away from perfection, **Pluralsight** seems like the perfect niche solution to highlight. Although the technology learning platform isn't a phrase that's widely understood, it backs it up with understanding the needs and pains of its buyers. Its heavy black, bold type – along with trendy use of gradients – makes Pluralsight stand out but may lack the shelf life of a typical brand. That might seem like a small concern, but to drive the level of recognition necessary to survive in the learning space, Pluralsight needs to find a way to sustain that brand consistently.

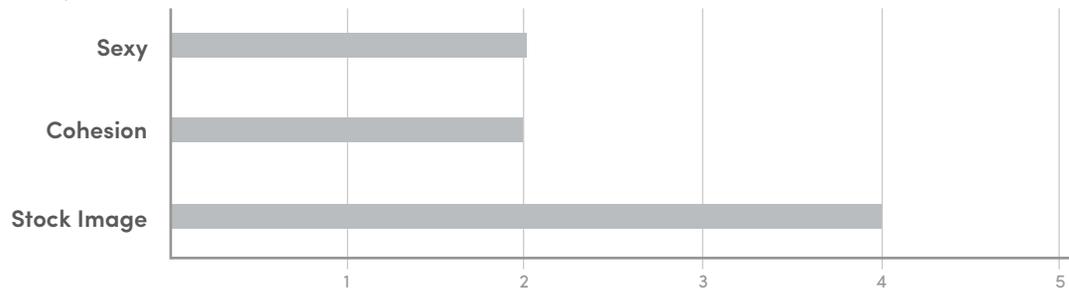


Skilljar

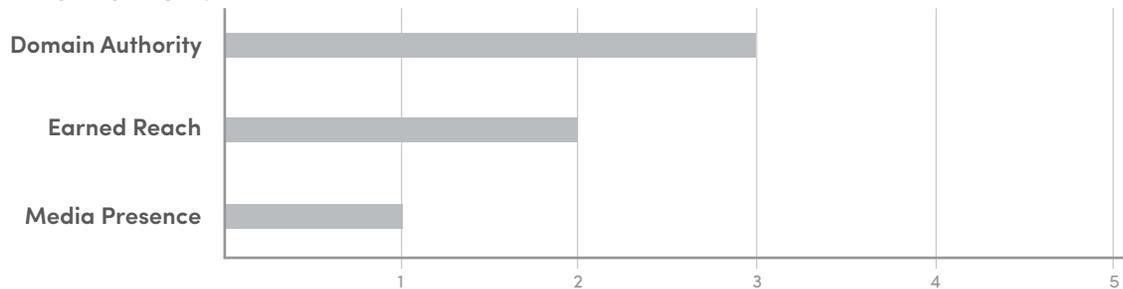
MESSAGE:



BRAND:



PROMOTION:

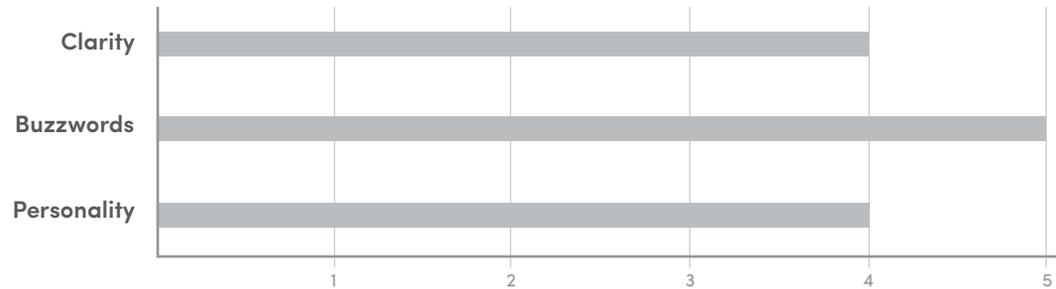


Skilljar takes on the stagnant extended enterprise learning market, and that's going to be enough for some buyers. Its message is clear and it does a great job of avoiding jargon — but could do more to appeal to a radical buyer who has always been a secondary consideration in the learning industry. Its visual brand could use some work, though. We see blue and orange across a lot of the enterprise software space. Its saving grace — a smart selection of stock images — can only take the company so far.



Udemy

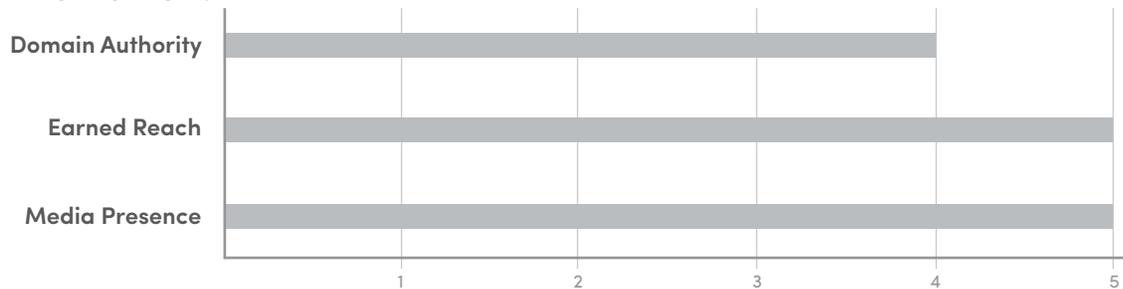
MESSAGE:



BRAND:



PROMOTION:



Udemy is still the MOOC champion and the subject of many Bersin mentions over the years. Fortunately, Udemy hasn't rested on its laurels. Its brand and message are sharp across the board. Should we nitpick? Of course. Its typeface is one of the most used in the world. Its brand system could be expanded beyond colors and iconography. Its word choice sometimes strays into the generic. The foundation is there and differentiated enough to build off of, which isn't a bad starting point.



Stand Out or GTFO

Learning will always evolve and change.

With that, learning providers must keep their eyes open and provide clear direction to the market at every point about where their solution plays in the bigger scheme of things.



Learning exists all over the enterprise, not just the LMS. Do you align your primary learning efforts with talent management, employee engagement, collaboration, or performance support? Does it live on an LMS island by itself? Buyers have a say, but they will be influenced by the way technologies and services align themselves going forward.

Communicating that point of view falls on learning vendors. On the whole, the market needs to quickly increase the sophistication and sharpness of their message to buyers. They must appeal to their most radical and aligned buyer with a tight message, polarizing brand, and comprehensive promotion strategy that says this is who we are and what we stand for.

The market cannot and will not deal with a soft point of view, a me-too brand, or an invisible promotional strategy.

We challenge the entire market to speak with the boldness that your category deserves.

Learning can change the world. If you don't believe that and you sell learning software, then it's time to get the hell out and find an industry you believe in.





READY TO TAKE A BOLD STANCE?

The Starr Conspiracy is ready to help you with clear strategies, fresh branding, and kickass promotion.

LET'S TALK



About The Starr Conspiracy

The Starr Conspiracy embraces the humanity in business to build brands that have emotional resonance. More than a global business-to-business marketing agency, we're a movement. We're changing the way technology companies view themselves, their customers, and the world. Unlike conventional agencies, we fuse advertising, technology, and advisory services in completely new ways — ways that defy categorization and challenge the old-school agency structure.

