

Report  
Abstract

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# 360° REPORT<sup>SM</sup>

**March 2007**

## LEARNING MANAGEMENT SYSTEMS

**The good, the bad, the ugly,  
... and the truth.**

*Online Analytics Tools  
provided by ...*



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## The eLearning Guild Research Pledge

It is our goal to provide the best research based on the best data. Indeed, with well over 24,000 e-Learning professionals – designers, developers, managers, and executives who are passionate about the art and science of e-Learning – The Guild has an unmatched and enormously rich and varied pool from which to gather data.

But let us be very clear that this data represents one thing and one thing only: the preferences, opinions, loves, loathings, trials, and triumphs of eLearning Guild members. Does the information represent the e-Learning industry as a whole? Probably, but we cannot – and will not – make that claim.

And anyone else publishing articles or research that makes that claim – and makes it using a much smaller data set than we would ever consider using – is presumptuous at best.

Here are the five articles of practice that drive eLearning Guild Research:

1. **Live, interactive, always-up-to-date.** In addition to providing members with truly useful visual analytics tools, the underlying data is *always* up to date and displayed in real time.
2. **Number of respondents.** Our research reflects the opinions of *thousands* of e-Learning professionals. The Guild has more, and better, data than is available any place else. *Indeed, we will never publish results from a survey unless we have received at least 750 fully-vetted responses.*
3. **No reliance on outside sources that will bias our reports.** With thousands of members updating their profiles and completing surveys, the Guild does not need to rely on outside sources for contacts to complete surveys.
4. **Funding.** The eLearning Guild funds its own research. We do not accept any form of sponsorship from vendors and/or suppliers for public research activities.
5. **Guaranteed Fresh.** Every 90 days we remind members to update their profiles and survey information. If a member goes a year without updating information, that information is filtered out of our live reports.

For the Guild's 360° Reports we carefully review respondents' data for accuracy and consistency. If we detect an anomaly, we contact that respondent and ask that he/she clarify his/her responses. If any issue cannot be resolved, the data from this respondent is discarded and is not included in our report.

The Guild is truly an amazing organization and I feel privileged to be a part of it. It is my goal to leverage the depth, breadth, and spirit of the Guild's members to produce the gold standard in e-Learning research.

Sincerely,



Steven S. Wexler  
Director of Research and Emerging Technologies

# Abstract

While the Learning Management Systems arena is more mature than other e-Learning markets, the market is still growing and expanding beyond its humble course management roots into comprehensive integrated talent management suites. During this growth and expansion some clear marketshare and satisfaction leaders have emerged. While there are 135 active LMS tools listed in the Guild's supplier database, our survey results indicate that the top 10 LMS vendors enjoy a 70% marketshare and the top 20 vendors own an 83% marketshare.

Our survey also revealed clear differences among the major players as well as clear differences in practices among members who report a good ROI and those that report a poor ROI.

As of this writing, over 1,080 eLearning Guild members have completed the Guild's survey on Learning Management Systems.

Highlights of our findings include:

- The cost per learner to acquire, configure, and customize an LMS for large corporations ranges from \$15.11 to \$57.02.
- Skillsoft enjoys greatest overall satisfaction in large corporations with a large number of learners impacted (greater than 5,000 employees and learners).
- 29.58% of survey respondents plan to upgrade their LMS and 10.69% plan to abandon their current LMS and move to a different vendor.
- Moodle (yes, Moodle) enjoys both the largest market share and satisfaction in smaller corporations with a smaller number of learners impacted (fewer than 5,000 employees and learners).
- 11% of survey respondents indicate that they have not received a return on investment from their investment in a Learning Management System.
- SumTotal is the market share leader in large corporations with a large number of learners impacted (greater than 5,000 employees and learners).
- 21% of survey respondents use more than one LMS.

- SAP and KnowledgePlanet enjoy the largest percent of users that report a good return on investment.
- Members who use a third party to host their LMS report greater satisfaction and a greater ROI than those that host internally or have the vendor host.

## **How the Report is Organized**

### ***Survey Results***

This report reflects the review and analysis of over 900 Guild member responses from between February and April, 2007. The direct data access portfolios contain responses from 1,087 members (as of this writing).

### ***Essays from Industry Experts***

The Guild has tapped several industry experts that share their valuable insights into the LMS landscape.

#### ***LMS Survival Guide: Evolve or Die***

Kevin Oakes, CEO of The Institute for Corporate Productivity (i4cp) and most recently Chairman of the American Society of Training & Development (ASTD), explains LMSs evolving role as a mission-critical application in many organizations, and provides an overview of the different ways that an LMS can help organizations impact corporate culture. Kevin also weighs in on crucial, but often overlooked, steps you should take when purchasing an LMS.

#### ***What an LMS Can't Do for an Organization***

Bob Mosher, Global Chief of Learning Strategy and Evangelism for Learning-Guide Solutions USA, and recognized worldwide leader for his pioneering role in e-Learning, acknowledges the tremendous benefits of an LMS but cautions readers not to expect miracles from even the best LMS and the best implementation. Bob's essay is a great complement to Kevin's as it makes the case that there are critical learning approaches that even the most malleable of LMSs may not be able to do.

#### ***Selecting, Installing and Configuring a LMS***

Tony Karrer, CEO/CTO of TechEmpower, and one of the world's top technologists in e-Learning and performance, brings priceless real-world experience and clear guidance that will help you avoid mistakes and accelerate your organization's selection, installation, and configuration of an LMS.

### ***It's About the People: The Real Key to Success with Your LMS***

Lance Dublin, founder of the Dublin Group and recognized expert in corporate learning programs and organizational change management, explains how to make sure the LMS you worked so hard to select, install, and configure is embraced within your organization. Lance contrasts the practices of organizations that get a good return on investment vs. those that get a bad one, and shows you how to avoid having a technological success that leads to an organizational failure.

### ***Moodle's Successful March into the LMS Market***

Margaret Martinez, CEO at The Training Place and pioneer in personalized learning research, and Sheila Jagannathan, e-Learning Specialist at the World Bank Institute and veteran of distance learning projects all over the world, explore the appeal of Moodle, the LMS darling of the Open Source Software world. Margaret and Sheila show how Moodle's allure stretches beyond the higher education sector into government and corporations.

### ***Notes from the Field: What LMS practitioners do and don't do***

In February and March, 2007, Lance Dublin, Tony Karrer, and Steve Wexler interviewed two dozen e-Learning professionals who shared their trials and triumphs with learning management systems. In this section, Angela van Barneveld, program manager in education services at a global business intelligence and corporate performance management solutions provider, highlights some of their observations and recommendations so that you can duplicate their successes and avoid the failures.

### ***Interviews with LMS Vendor Executives***

The eLearning Guild enjoyed the privilege of interviewing senior executives from eight of the most popular LMS tool vendors. In this series of candid and illuminating discussions, we hear the passions, plans, and prognostications of business leaders that are determined to address the concerns of eLearning Guild members and the industry as a whole.







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# Market Share, Satisfaction Results, and Guild Members Choice Awards

## Overview

In addition to the survey data conducted for this report, The eLearning Guild gathers other information from its members, including **member profile data**.

All Guild members are directly involved in the management, design, development, and delivery of e-Learning in corporate, government, academic, and non-profit organizations.

For this community to succeed – and for members to get as much as possible from the Guild – we ask that every member submit a complete and accurate profile.

At the time of this writing, more than 8,100 members have up-dated their profiles. Members are updating their profiles at a rate of approximately 1,000 per month. In addition, more than 5,500 members have indicated which tools, products, and services they use, and have rated these tools, products, and services.

Market share and Tools satisfaction reports for all categories of tools, products, and services are available to all paying Guild members (see <http://www.elearningguild.com/pbuild/linkbuilder.cfm?selection=fol.28>). We have included a subset of these reports, both here and online, that summarizes market share and satisfaction for Learning Management Systems.

*At the time of this writing, more than 8,100 members have up-dated their profiles. Members are updating their profiles at a rate of approximately 1,000 per month.*



## **Guild Members Choice Platinum and Gold Award Winners**

The eLearning Guild Research is very pleased to present tool and product vendors with two types of awards to recognize these vendors' contributions to the e-Learning industry.

### ***Guild Research Market Share Award***

Guild Research presents one Platinum award and up to four Gold awards to the products within a particular category that are used by the most Guild members, recognizing these vendors for developing tools and products that make Guild members' lives easier.

### ***Guild Research Satisfaction Award***

Guild Research presents one Platinum award and up to four Gold awards to the products within a particular category that have received the highest overall satisfaction rating from Guild members.

### ***How we determine overall satisfaction rating***

We ask members to rate products on a scale from 1 to 10 in four categories. The overall score is determined based on the following weightings:

- Would you use this vendor again? – 50%
- Vendor responsiveness (includes technical support) – 15%
- Learning / Implementation curve – 15%
- Cost / benefit – 20%



## Notes on the Tools and Products in this Section

- Filter: Industry
- Aerospace/Defense
  - Agriculture/Mining
  - Automotive/Transportation
  - Computer Manufacturing (hardware, s...
  - Construction/Architecture/Engineering
  - Consulting (Computer)
  - Consulting/Business Services (Non-co...
  - Education (K-12)
  - Education (University/College)
  - E-Learning Tool/Service Provider
  - Energy/Utilities
  - Financial/Banking/Accounting
  - Government (Federal including Military)
  - Government (Local)
  - Government (State)
  - Healthcare
  - Insurance
  - Manufacturing (non-computer)
  - Media/Marketing/Advertising/Entertain...
  - Non-Profit/Trade Association
  - Pharmaceuticals/Biotech
  - Real Estate
  - Retail/Wholesale/Distribution (Computer)
  - Retail/Wholesale/Distribution (Non-co...
  - Telecommunications
  - Travel/Hospitality

The market share and satisfaction results represent how Guild members use, or have used, these products as of March 17, 2007. As of this date, 2,269 members have told us which Learning Management Systems they use, and 1,200 members have rated these tools.

The list of tools that they use, and those which are well-rated, will always be changing. And what is popular within one industry, or for a large organization, may not be popular for another industry, or for a small organization.

**Important:** We strongly encourage you to take advantage of the online interactive analytics and survey data so you can focus on the market share and satisfaction leaders for your industry and your company size. You can further filter by job level, primary job responsibility, and number of learners impacted.



## LMS Market Share – Large Corporate

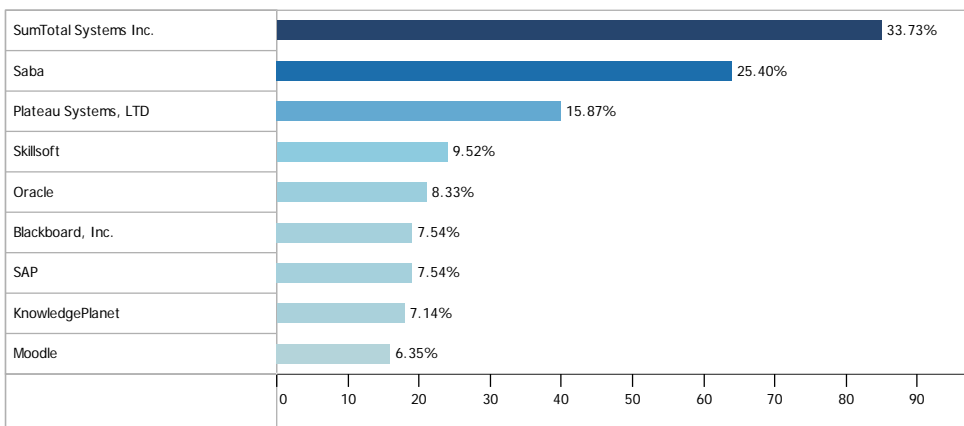


Figure 21 – LMS Tool market share results as of March, 2007, for corporations with a minimum of 5,000 employees and 5,000 learners (based on minimum of 15 organizations that use the LMS).



### **Guild Research 2007 Platinum Award – Market Share: Large Corporate Learning Management Systems**

**SumTotal Systems, Inc.**



### **Guild Research 2007 Gold Awards – Market Share: Large Corporate Learning Management Systems**

**Saba**

**Plateau Systems, LTD**





## LMS Market Share – Small and Medium Corporate

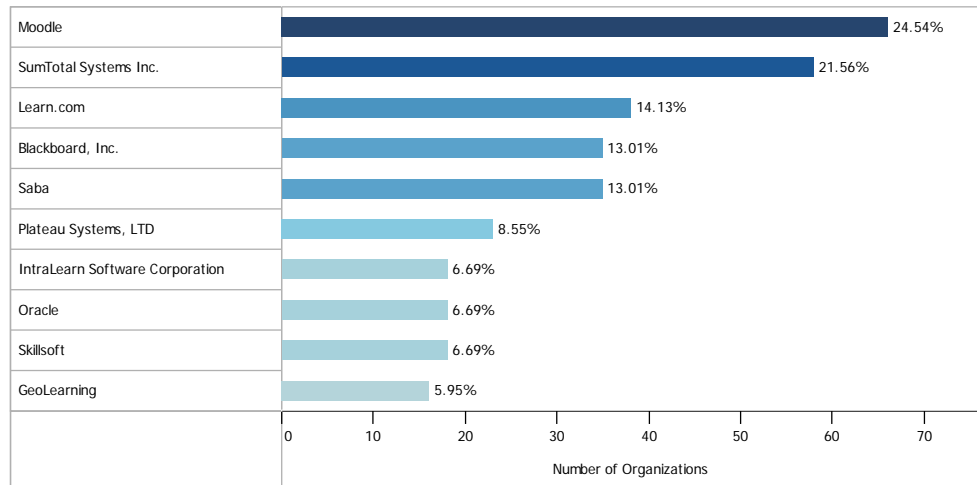


Figure 22 – LMS Tool market share results as of March, 2007, for corporations with fewer than 5,000 employees and fewer than 5,000 learners (based on minimum of 15 organizations that use the LMS).



### **Guild Research 2007 Platinum Award – Market Share: Small and Medium Corporate Learning Management Systems**

**Moodle**



### **Guild Research 2007 Gold Awards – Market Share: Small and Medium Corporate Learning Management Systems**

**SumTotal Systems, Inc.**

**Learn.com**



## LMS Market Share – Education and Government

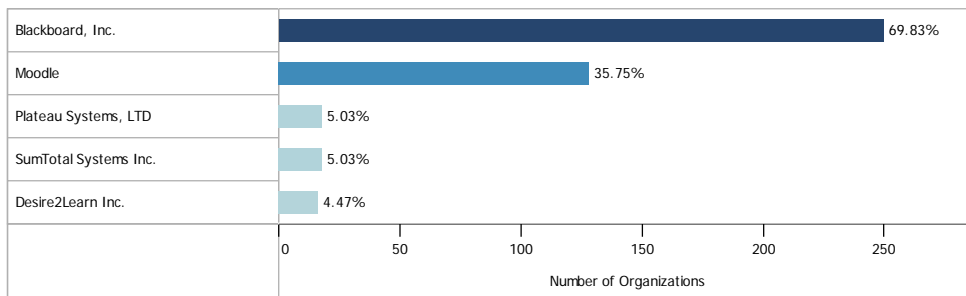


Figure 23 – LMS Tool market share results as of March, 2007, for education and government institutions (based on minimum of 15 organizations that use the LMS).



### **Guild Research 2007 Platinum Award – Market Share: Education and Government Learning Management Systems**

**Blackboard, Inc.**



### **Guild Research 2007 Gold Awards – Market Share: Education and Government Learning Management Systems**

**Moodle**



## LMS Satisfaction – Large Corporate

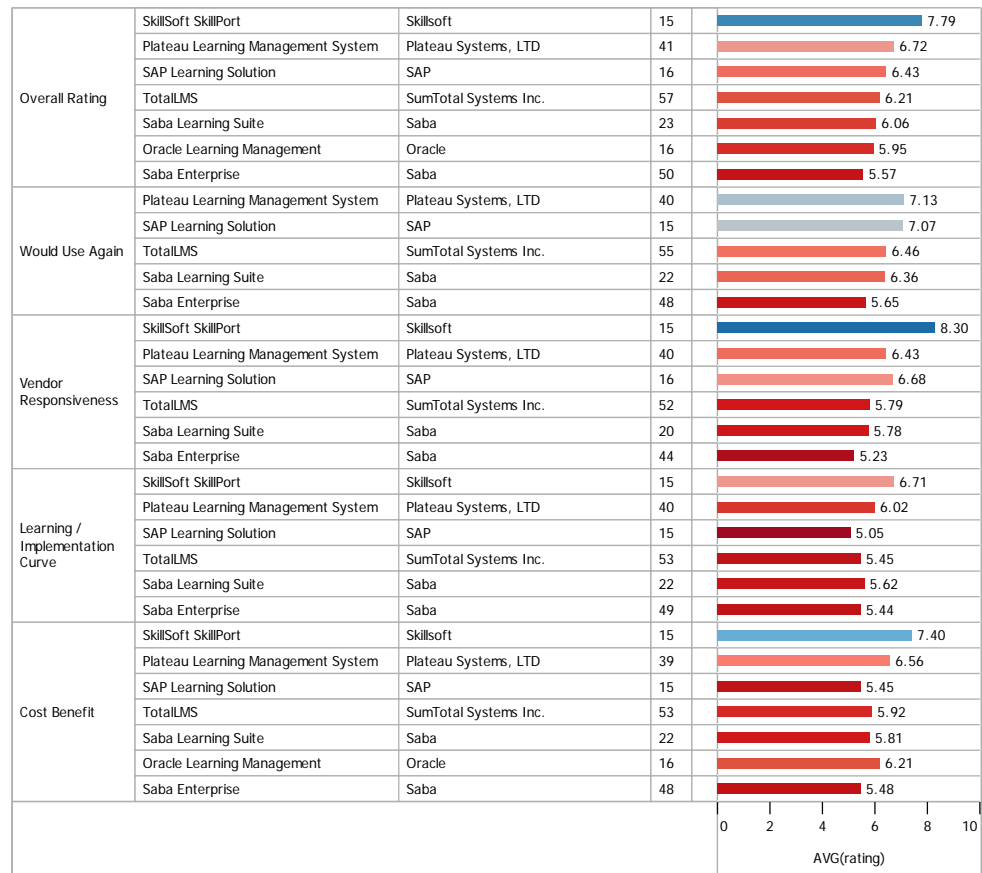


Figure 24 – LMS satisfaction results as of March, 2007, for corporations with a minimum of 5,000 employees and 5,000 learners (based on minimum of 15 members that use the LMS. The number to the left of the rating bars indicates the number of members who have rated the tool).



### Guild Research 2007 Platinum Award – Satisfaction: Large Corporate Learning Management Systems

**SkillSoft – SkillSoft SkillPort**



### Guild Research 2007 Gold Awards – Satisfaction: Large Corporate Learning Management Systems

**Plateau Systems LTD – Plateau Learning Management System**

**SAP – SAP Learning Solution**



## LMS Satisfaction – Small and Medium Corporate

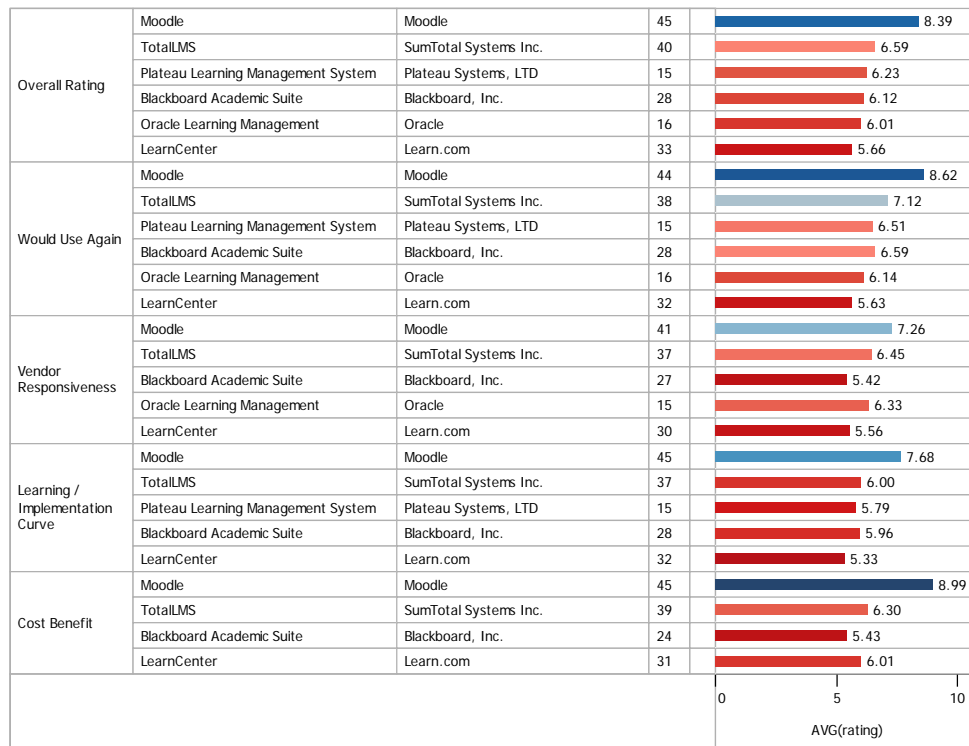


Figure 25 – LMS satisfaction results as of March, 2007, for corporations with fewer than 5,000 employees and fewer than 5,000 learners (based on minimum of 15 members that use the LMS).



### **Guild Research 2007 Platinum Award – Satisfaction: Small and Medium Corporate Learning Management Systems**

**Moodle – Moodle**



### **Guild Research 2007 Gold Awards – Satisfaction: Small and Medium Corporate Learning Management Systems**

**SumTotal Systems – TotalLMS**

**Plateau Systems LTD – Plateau Learning Management System**



## LMS Satisfaction – Education and Government

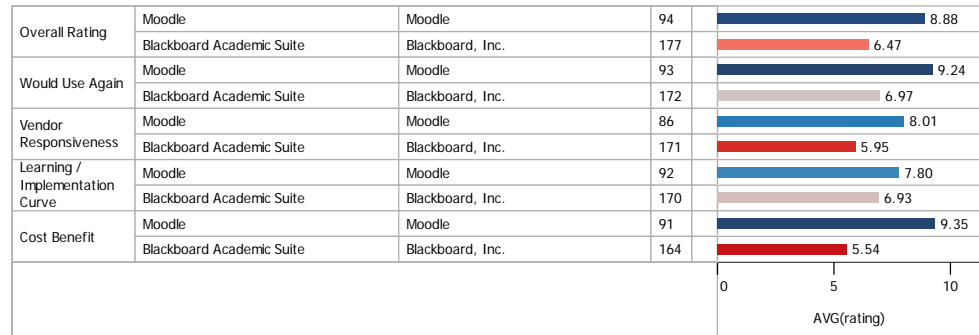


Figure 26 – LMS satisfaction results as of March, 2007, for educational and government institutions (based on minimum of 15 members that use the LMS).



### **Guild Research 2007 Platinum Award – Satisfaction: Education and Government Learning Management Systems**

**Moodle – Moodle**



### **Guild Research 2007 Gold Awards – Satisfaction: Education and Government Learning Management Systems**

**Blackboard, Inc. – Blackboard Academic Suite**



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