



docebo

E-Learning Trends 2019

Table Of Contents

3	Executive Summary	15	E-Learning Trends	35	Generation Z
4	Market Overview	16	Learning Technology Trends		Anatomy of Gen Z Designing L&D for Gen Z L&D as Talent Bait
5	E-Learning Market	17	Rethinking The Traditional LMS		
	Global E-Learning Market Size Worldwide Revenue Forecasts (Region/Product Category) The Generational Winds of Change		The Rise of the Modern Learning Platform	38	Artificial Intelligence (AI)
10	Corporate E-Learning Market	20	Social Learning		AI Makes L&D a Competitive Advantage Personalized Learning at Scale A Glimpse Into The Future
	What's Driving Market Growth? Learning Technology Priorities Top Reasons for Switching Learning Platforms		Social Learning is no Longer a Theory About The Future Social Learning & the L&D Holy Grail: Engagement Social Learning Trends to Consider For The Very Near Future	44	Conclusion
		25	Skills Management		Conclusion About Docebo
			Connect Learning to Performance Should You Hire or Train? Bridging Skills Gaps		
		30	Mobile Learning		
			Mobile Learning Market Outlook Mobile Trends Guaranteed to Influence Your L&D Programs in 2019		

Executive Summary

More companies than ever are adopting new technologies to enhance their learning environments, yet some continue to perform these activities more so manually than they likely should. Indeed, the e-learning industry is never static. Many moons ago, the learning management system (LMS) changed the e-learning game, giving organizations a way to centralize their learning activities digitally, which in its simplest form, was meant to speed-up learning without sacrificing the quality of learning outcomes.

Yet, the pace at which learning technology has evolved is a direct result of the many variables that demanded that evolution in the first place to ensure L&D remained relevant, engaging and effective. While the LMS offered new opportunities for digitally-centralized learning, social learning platforms amplified its effectiveness by allowing the learner to play an active role by contributing user-generated knowledge capital to foster a true sense of community. Meanwhile, skills management tools allow organizations to connect learning to performance by identifying (and closing) employee skills gaps with targeted learning interventions.

Together, they combine to deliver a more holistic approach to L&D and are the foundation of the new norm for the effective delivery of L&D activities: the learning platform.

Arguably most exciting about these developments is based around concepts related to Artificial Intelligence (AI) as the engine powering modern L&D activities, in addition to other exciting developments in machine learning, big data, personalized learning and mobile learning. Indeed, AI in e-learning is no longer a buzzword, but a very real, incredibly useful tool that

will transform humanity by augmenting the way people learn. The world is becoming a more chaotic and complex place faster than ever – the learning industry has the responsibility to create technologies that will help people during this transition toward a better technology-driven world.

As you will see in the pages that follow, there is a healthier than ever before appetite for L&D and particularly among younger Millennial and Gen-Z cohorts that in many cases place more emphasis on opportunities for professional development than they do salary increases.

Read on to gather valuable (and actionable) e-learning technology insights, including:

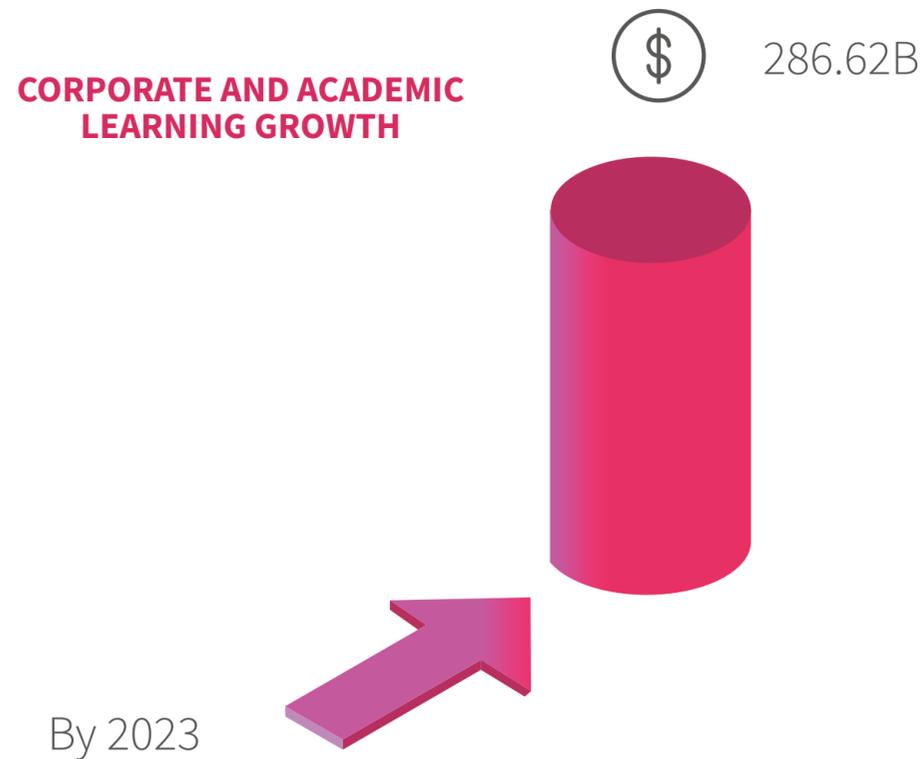
- An assessment of the global e-learning landscape, including revenue forecasts and analysis of growth drivers in the L&D industry
- A detailed outline of global learning technology priorities
- Emerging trends in the L&D space such as social learning, mobile learning, connecting skills development to organizational performance, and the impact of generational changes in the global workforce and L&D space
- A detailed analysis of the impact Artificial Intelligence's role in learning technology is already delivering, and an outlook at the developments to come

We're confident this comprehensive report will provide you with a great source of knowledge for the learning industry for 2019 and well beyond.

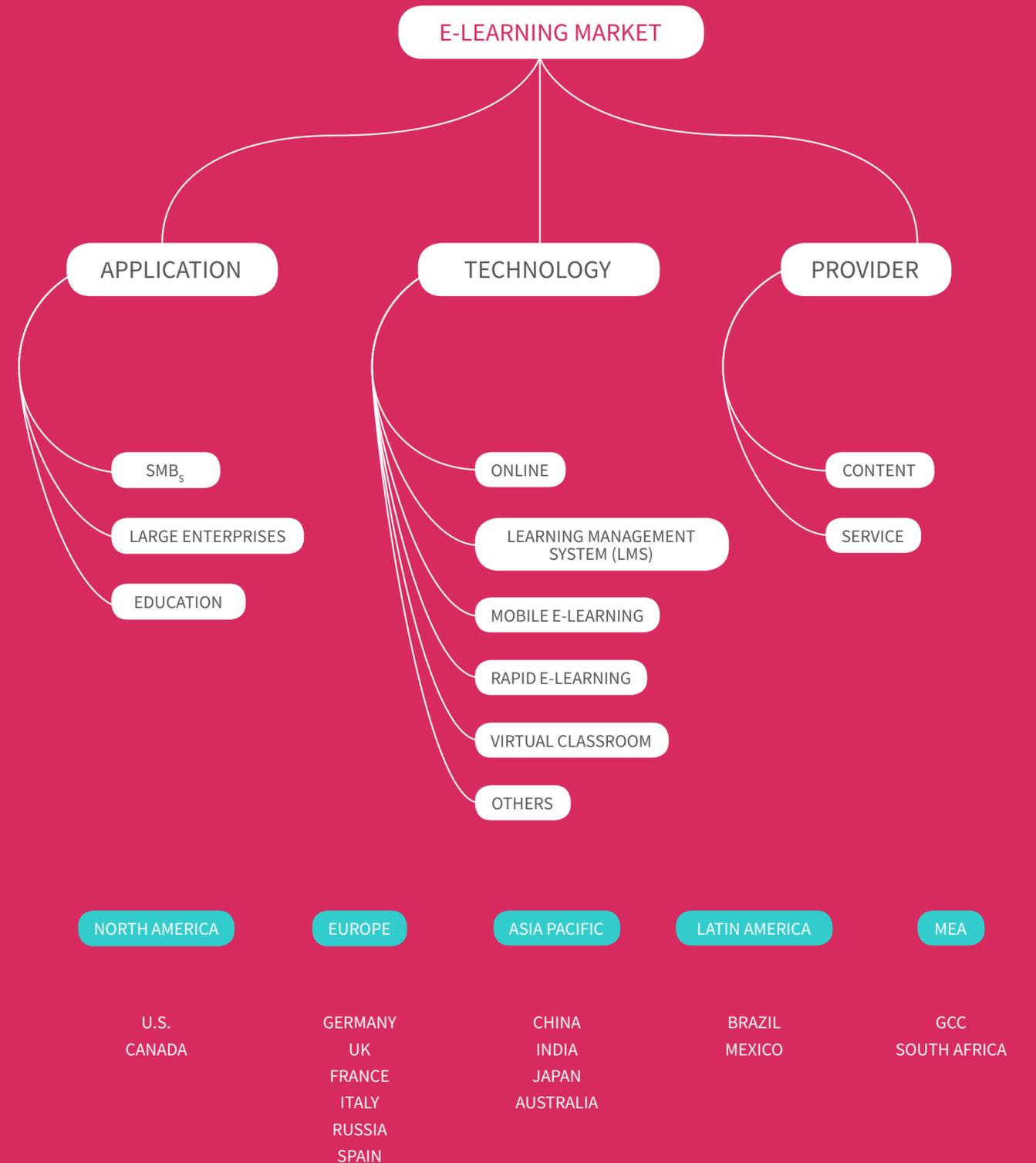
Market Overview

E-Learning Market

The global e-learning market is projected to see compound annual growth (CAGR) of 10.26% between 2018 and 2023, reaching a total market size of US\$286.62 billion, up from US\$159.52 billion in 2017. Continued growth is the result of, at least in part, strong demand for flexible learning technology solutions in the corporate and academic sectors, as well as the advancements in the field of artificial intelligence-driven platforms, which are expected to further buoy the industry's growth.



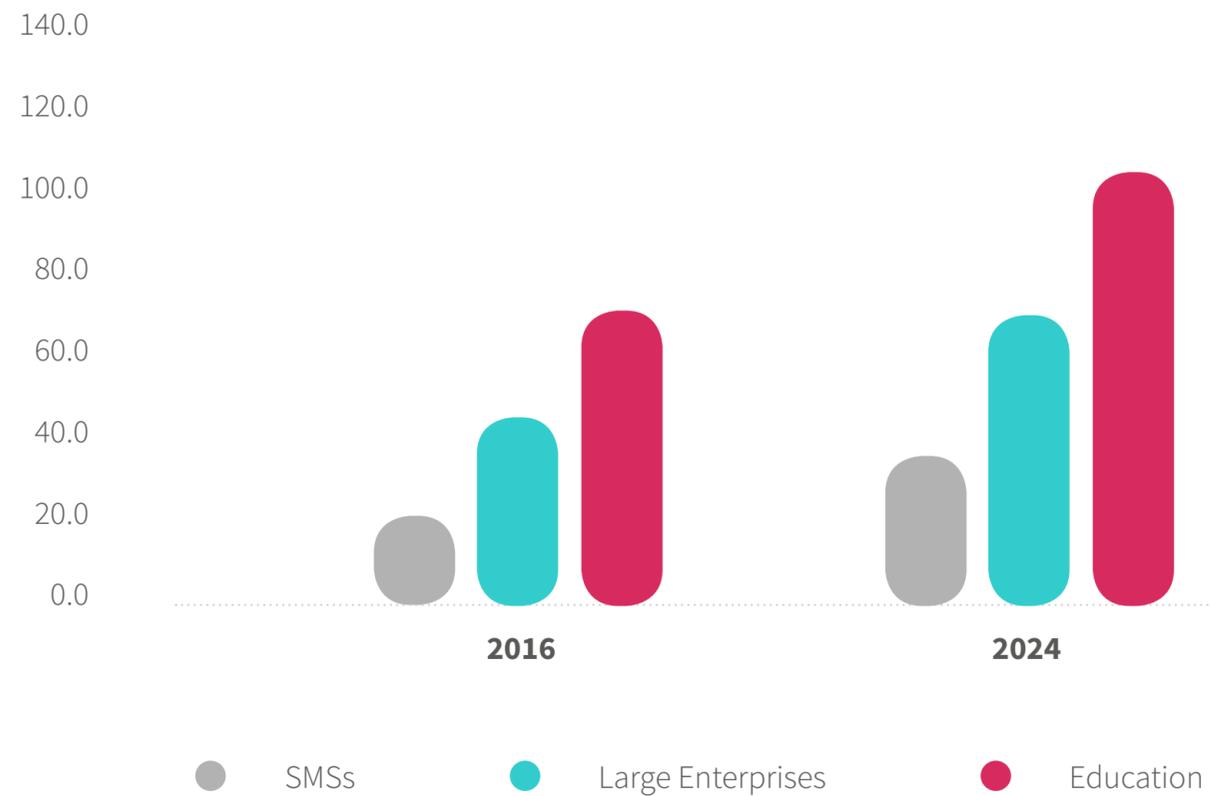
Source: Global Market Insights



Global E-Learning Market Size

Increased adoption of learning technology solutions in the corporate landscape, regardless of industry, is a driving factor for e-learning market growth. For context, consider that market size in 2010 totalled \$32 billion, before growing to roughly \$107 billion by 2015.

GLOBAL E-LEARNING MARKET SIZE, BY APPLICATION, 2016 AND 2024 (USD BILLION)



Source: Global Market Insights

Worldwide Revenue Forecasts (Region/Product/Category)

2016-2021 WORLDWIDE REVENUE FORECASTS FOR SELF-PACED E-LEARNING PRODUCTS AND SERVICES BY REGION (IN US\$ MILLIONS)

REGION	2016	2017	2018	2019	2020	2021
North America	\$23,337.4	\$22,258.8	\$21,605.2	\$20,003.6	\$18,357.0	\$16,967.0
Latin America	\$2,106.0	\$1,030.4	\$1,732.0	\$1,565.0	\$1,328.4	\$1,189.0
Western Europe	\$7,978.6	\$8,318.7	\$8,386.8	\$8,096.4	\$7,703.8	\$7,403.0
Eastern Europe	\$1,024.8	\$1,125.9	\$1,298.8	\$1,221.7	\$1,116.9	\$967.8
Asia	\$10,936.5	\$10,757.6	\$9,280.8	\$8,245.4	\$6,848.2	\$5,874.8
Middle East	\$683.7	\$708.3	\$729.4	\$700.1	\$586.3	\$460.4
Africa	\$607.7	\$716.0	\$806.3	\$833.2	\$754.6	\$636.3
TOTALS	\$46,674.7	\$45,815.7	\$43,840.2	\$40,665.4	\$36,695.2	\$33,498.2

Source: Ambient Insight

The e-learning market in the US is expected to post a CAGR of around 5% between 2018 to 2022, according to Technavio. However, the market is expected to decelerate over the forecast period owing to a decrease in the year-over-year growth.

THE RISE OF DIGITAL IS TRANSFORMING TALENT DEVELOPMENT



Employees prefer to learn **at work**



Employees prefer to learn **at their own pace**



Employees prefer to learn **at the point of need**



A key factor driving market growth is the inherent flexibility and cost-effectiveness of e-learning, which also provides learners with the flexibility to learn from home or on the road, improving convenience and overall effectiveness of various learning activities. This is particularly true of mobile learning technology options that mimic desktop versions of their learning platforms. Moreover, advances in learning technology are enabling people to decide how, when and what to learn and establish their own learning goals choosing from a wide variety of subjects, whether those interests are of personal or professional interest.

Source: LinkedIn Learning, Workplace Learning Report

2016-2021 WORLDWIDE REVENUE FORECASTS FOR SELF-PACED E-LEARNING BY THREE PRODUCT CATEGORIES (IN US\$ MILLIONS)

PRODUCT CATEGORY	2016	2017	2018	2019	2020	2021
Packaged Content	\$33,062.80	\$32,065.14	\$30,444.82	\$28,130.00	\$25,189.35	\$22,598.11
Services	\$6,490.38	\$6,898.56	\$7,161.09	\$7,333.42	\$7,502.12	\$7,657.60
Platforms	\$7,121.49	\$6,851.99	\$6,234.27	\$5,201.97	\$4,003.76	\$3,242.50
TOTALS	\$46,674.7	\$45,815.7	\$43,840.2	\$40,665.4	\$36,695.2	\$33,498.2

Source: Ambient Insight

As a notoriously early adopter of new technology, North American vendors are embracing and incorporating advanced technologies such as Artificial Intelligence (AI), virtual assistants, AR and VR in e-learning solutions.

Meanwhile, organizations are recognizing the importance of talent development and training, from the top-down. Given that more organizations than ever before are emphasizing the importance of L&D and talent development, there's a case to be made that the strength of the e-learning market and its focus on technological innovation is being buoyed by a stronger consensus among top executives that Learning & Development (L&D) is a benefit to their organization.

TALENT IS TOP OF MIND FOR EXECUTIVES



Of executives say talent is the number one priority at the company

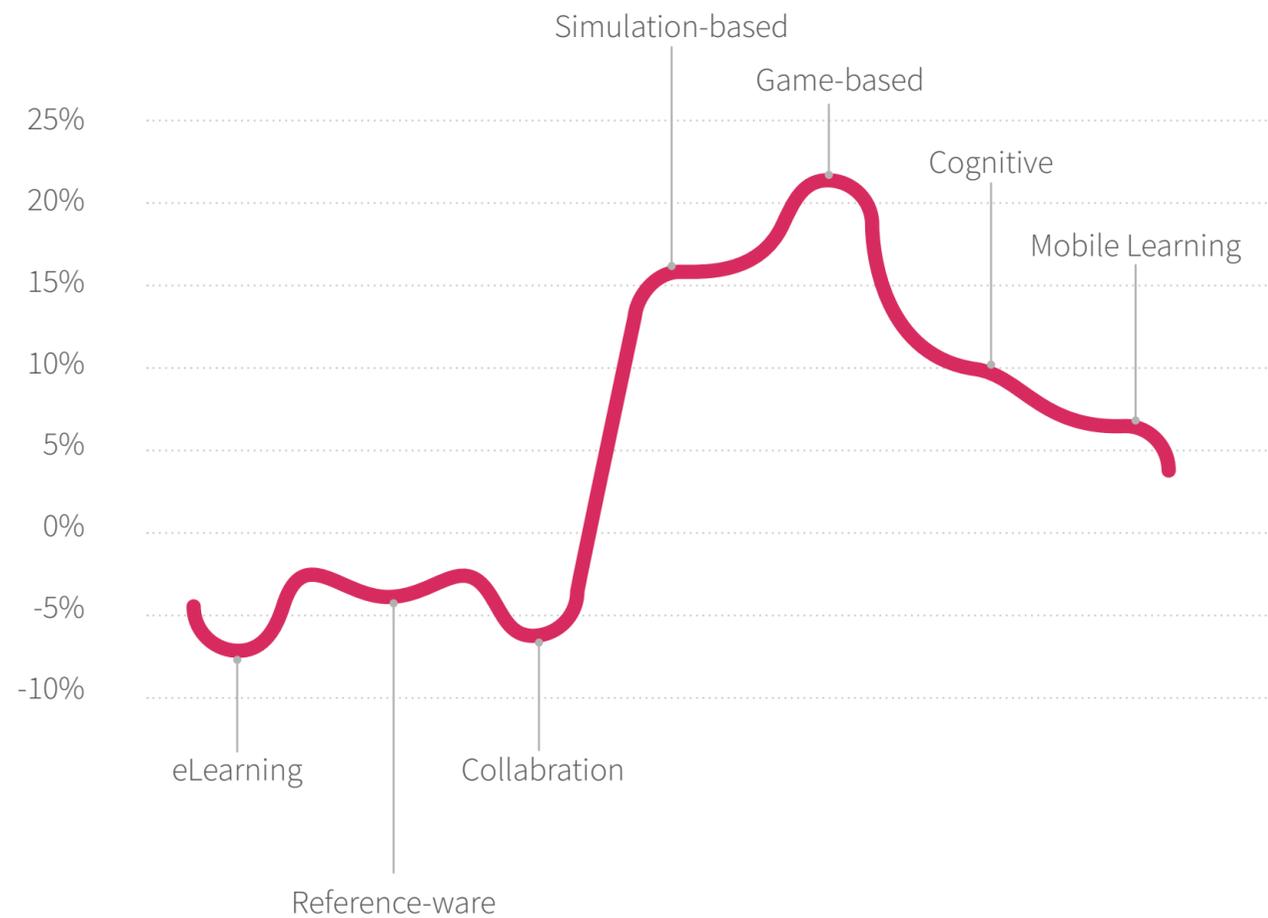


Of executives say that learning and development is a necessary benefit to the employees at the company

Source: LinkedIn Learning, Workplace Learning Report

Meanwhile, as Millennial and Generation-Z aged employees infiltrate the organizational ranks, decision-makers are recognizing an importance on the development of soft skills, especially as it relates to softening the impact of automation. According to LinkedIn Learning's 2018 Workplace Learning Report, training for soft skills is a top priority to mitigate the pace of technological change, which demands adaptable, critical thinkers, communicators and leaders.

2016-2021 GLOBAL FIVE-YEAR GROWTH RATES BY SEVEN LEARNING TECHNOLOGY TYPES



Source: Ambient Insight

The rapid scale of globalization has also sparked the need for language and sensitivity learning. The trend of multinational corporations moving employees to foreign locations and the increase in remote workforces are increasing demand for these services.

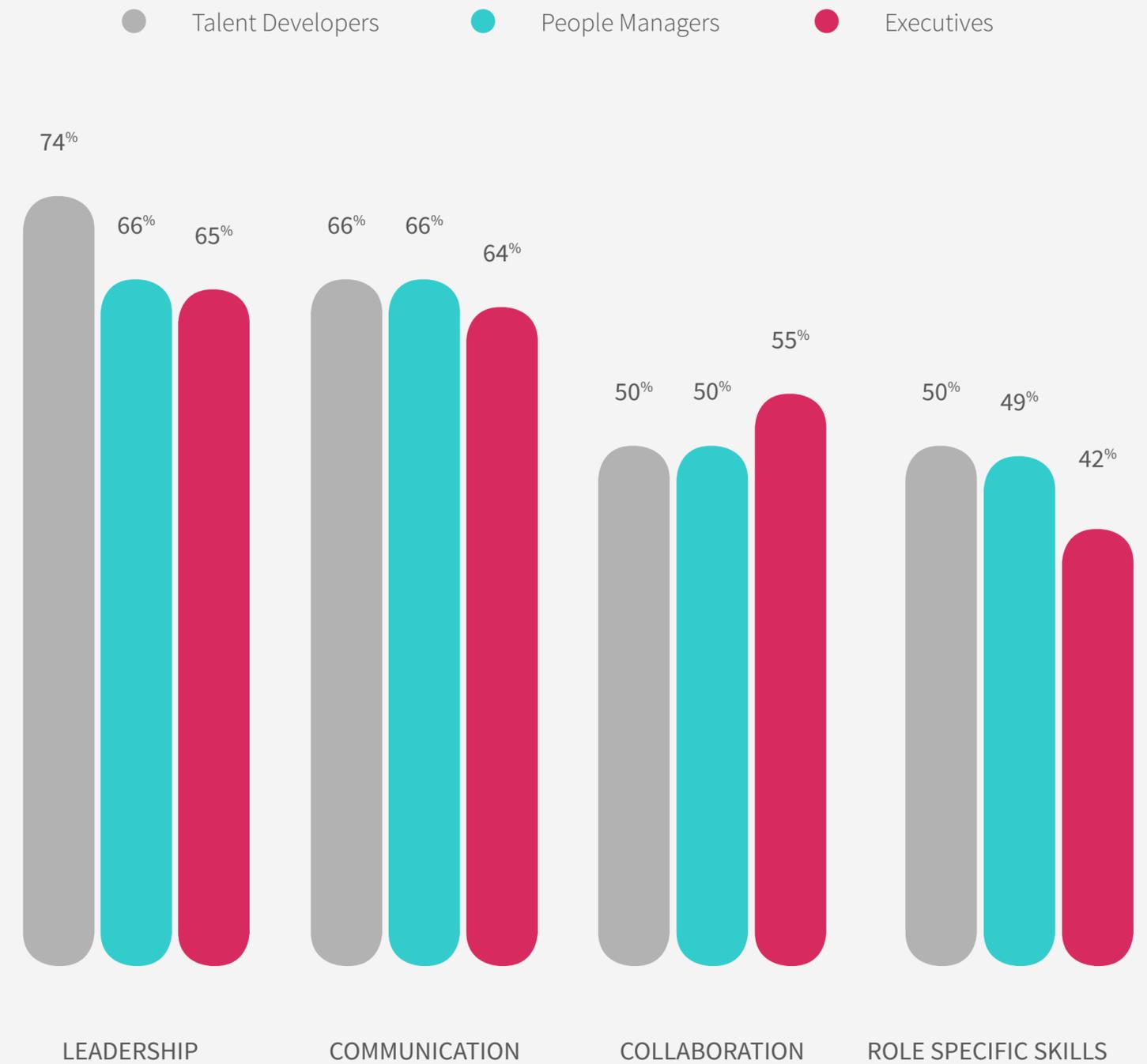
The corporate e-learning market can be segregated by size to include SMBs and large institutions. SMBs, having limited financial resources, are anticipated to increasingly adopt learning technology as it allows multiple employees to be trained in a less cost-intensive way. Owing to increasing rates of globalization and rapid industrialization, larger organizations with large and dispersed employee bases are resorting to diversity and sensitivity training, and technical and management training for various tiers across the organization.

WHAT ARE THE TOP PRIORITIES FOR YOUR L&D PROGRAMS IN 2018?

- 1 HOW TO TRAIN FOR SOFT SKILLS
- 2 CONSISTENT VALUABLE GLOBAL TRAINING
- 3 DELIVER INSIGHTS ON INTERNAL SKILL GAPS
- 4 HOW TO TRACK SKILL DEVELOPMENT
- 5 HOW TO ACCESS SKILL COMPETENCIES
- 6 UNDERSTANDING THE IMPACT OF TECHNOLOGY

Source: LinkedIn Learning, Workplace Learning Report

WHAT ARE THE MOST IMPORTANT SKILLS FOR EMPLOYEES TO LEARN FROM L&D PROGRAMS?



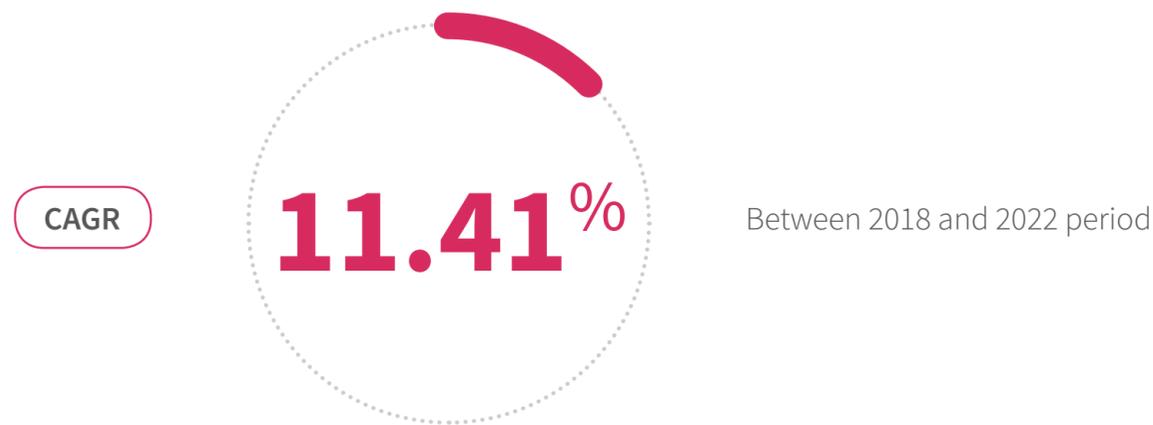
Source: LinkedIn Learning, Workplace Learning Report

Corporate E-Learning Market

According to the latest market study released by Technavio, the size of the global corporate e-Learning market is predicted to reach an approximate amount of **USD 30 billion in revenue by the end of 2022**.

The corporate e-Learning market is also expected to grow at a **CAGR of 11.41% between 2018 and 2022 period**.

The Americas held the highest share of the global corporate e-Learning market in 2017, accounting for a market share of approximately 38%. The market share occupied by this region is anticipated to decrease by nearly 4% during 2018-2022.



What's Driving Market Growth?

A key factor driving the market's growth is the increase in employee satisfaction. Training is essential for employees' productivity. People who start their jobs without proper training are prone to stress and anxiety. Hence, proper training needs to be provided to new hires. The initial training plays an important part in an employee's job.

Also, regular learning sessions are important as knowledge tends to recede over time. Providing training to employees increases an employee's satisfaction at work, increases their know-how, and keeps them updated on the latest developments in their respective field.

The corporate e-Learning segment includes all forms of electronically-supported learning and teaching tools used by firms and organizations to facilitate continuous learning and development (L&D) of their workforce. e-Learning allows organizations to switch to more advanced learning and teaching models that use digital formats to integrate information.

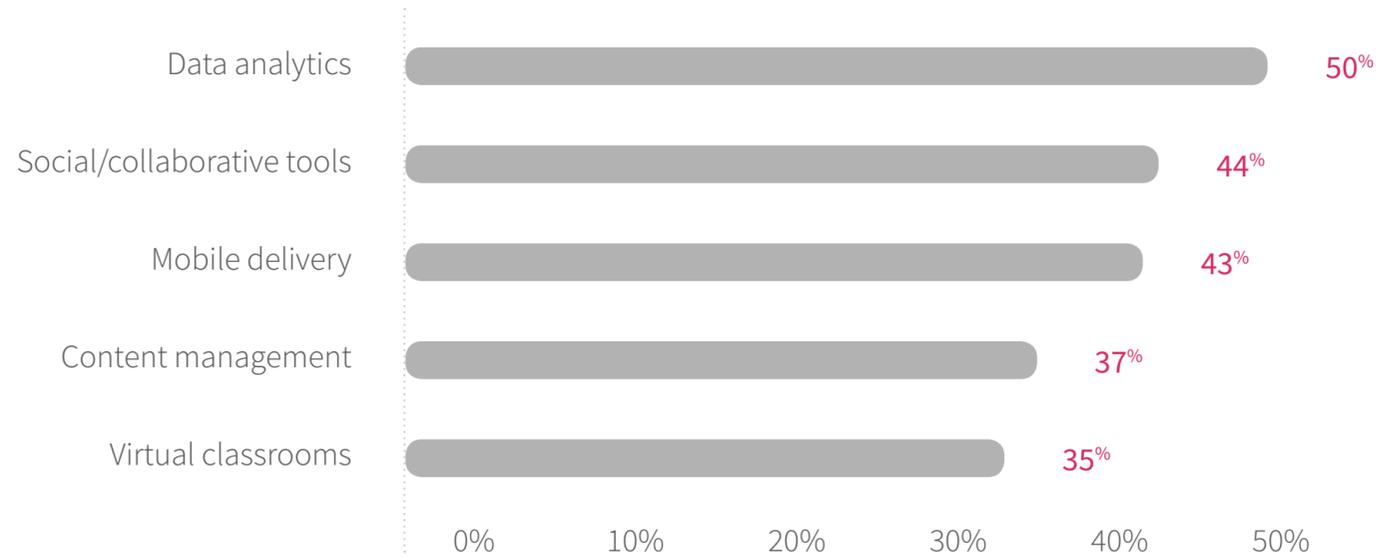
Enterprises of different sizes have started considering e-Learning as a viable solution to their budget and productivity related issues, as changing business needs and technology improvements have encouraged the adoption of e-Learning solutions at the expense of traditional teaching methods.

The introduction of social, mobile, analytics, and cloud (known as SMAC) technologies has also facilitated the adoption of e-Learning solutions.

Another main driver is people's growing attitude towards self-training for job-related purposes, based on personal initiative.

Learning Technology Priorities

WHAT ARE YOUR TOP LEARNING TECHNOLOGY PRIORITIES FOR THE NEXT 12-24 MONTHS?



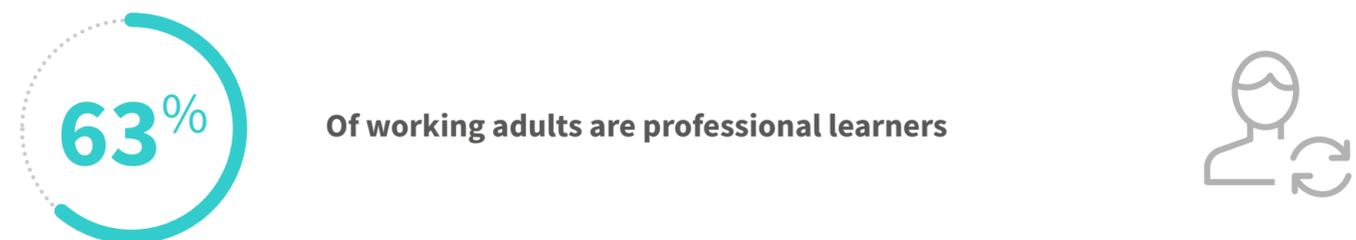
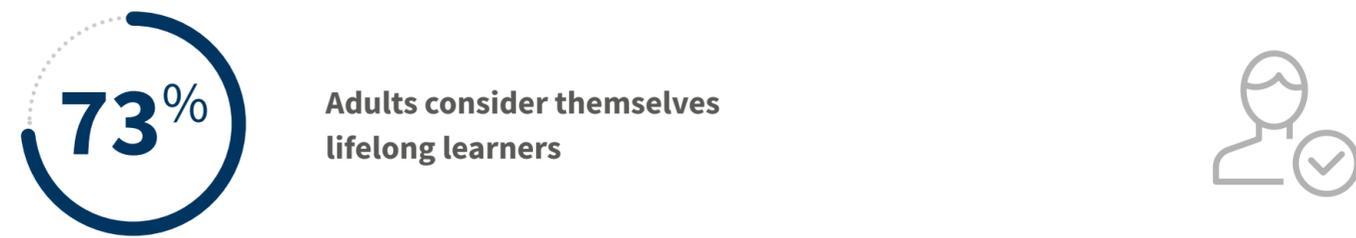
TOP 5 LEARNING TECHNOLOGY PRIORITIES IN SMALL ORGANIZATIONS



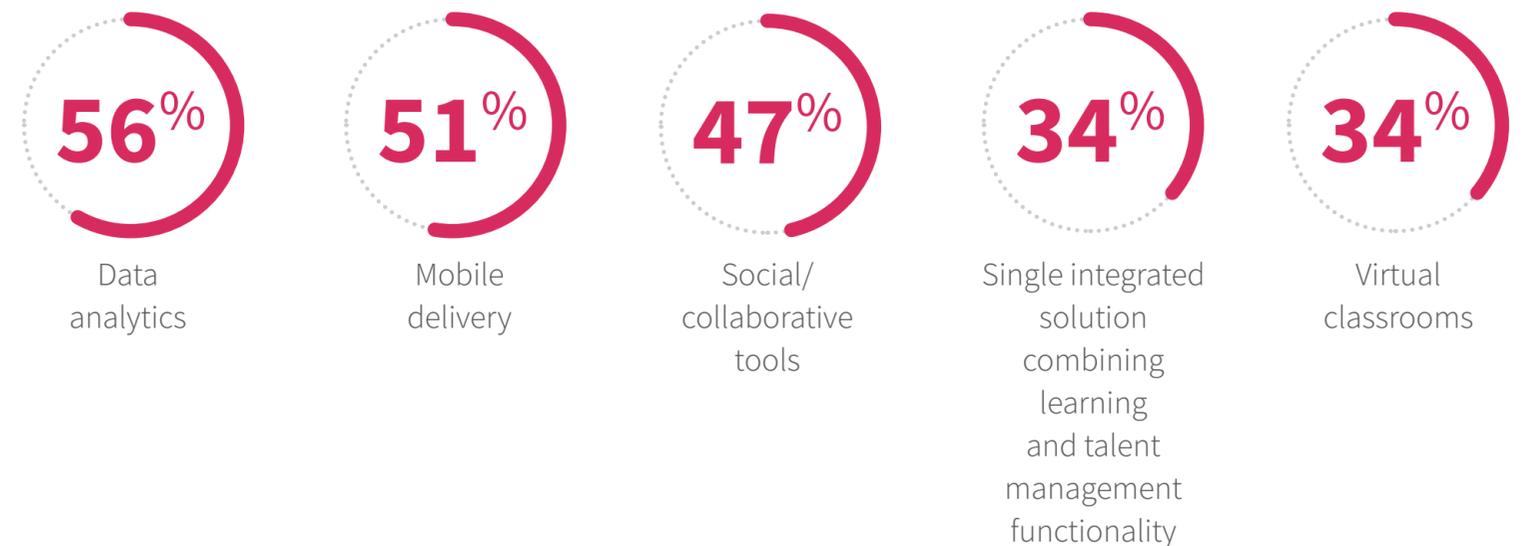
TOP 5 LEARNING TECHNOLOGY PRIORITIES IN MID-SIZE ORGANIZATIONS



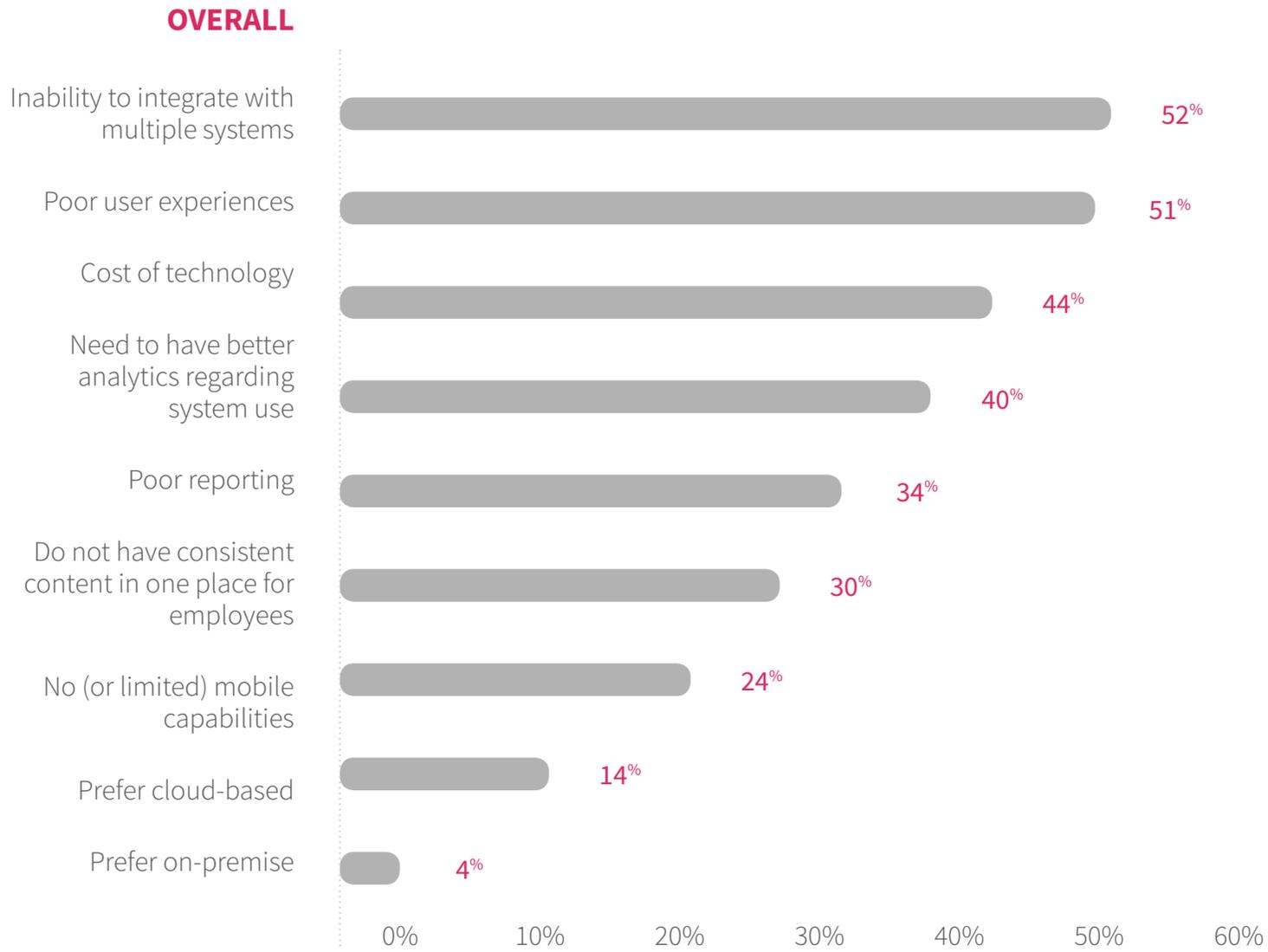
ACCORDING TO THE PEW RESEARCH CENTER



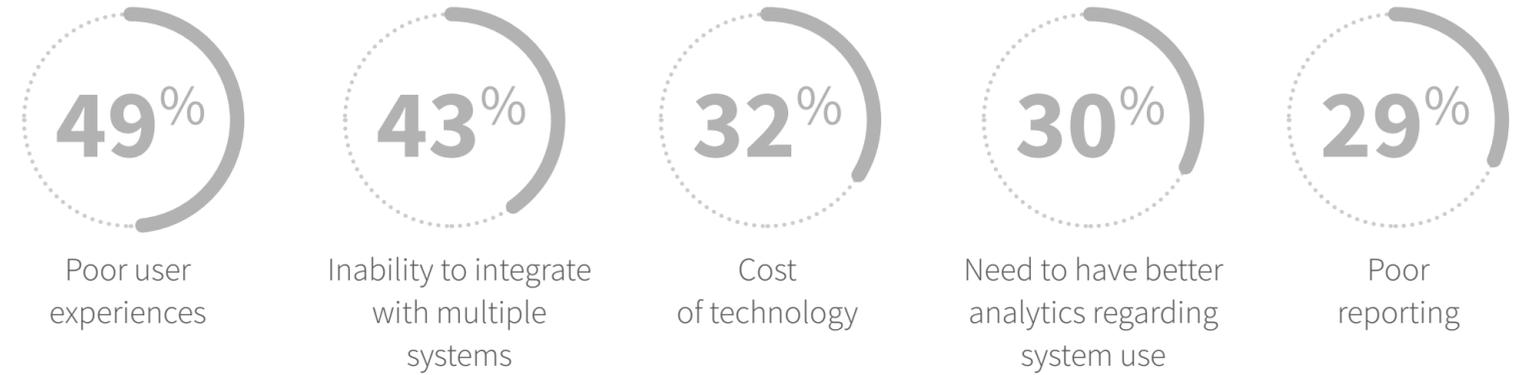
TOP 5 LEARNING TECHNOLOGY PRIORITIES IN LARGE ORGANIZATIONS



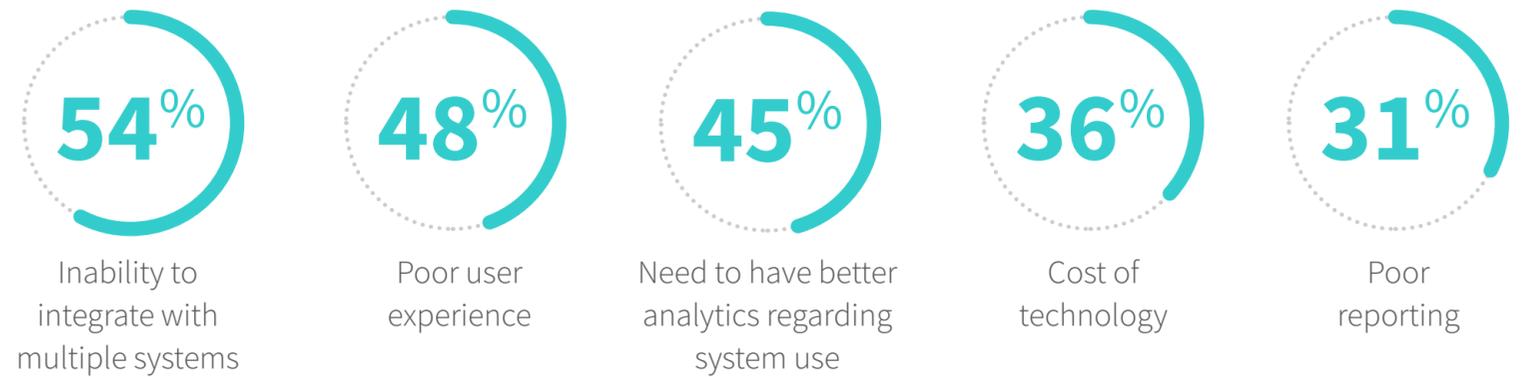
WHAT ARE THE BIGGEST BARRIERS TO SATISFACTION WITH LEARNING TECHNOLOGY?



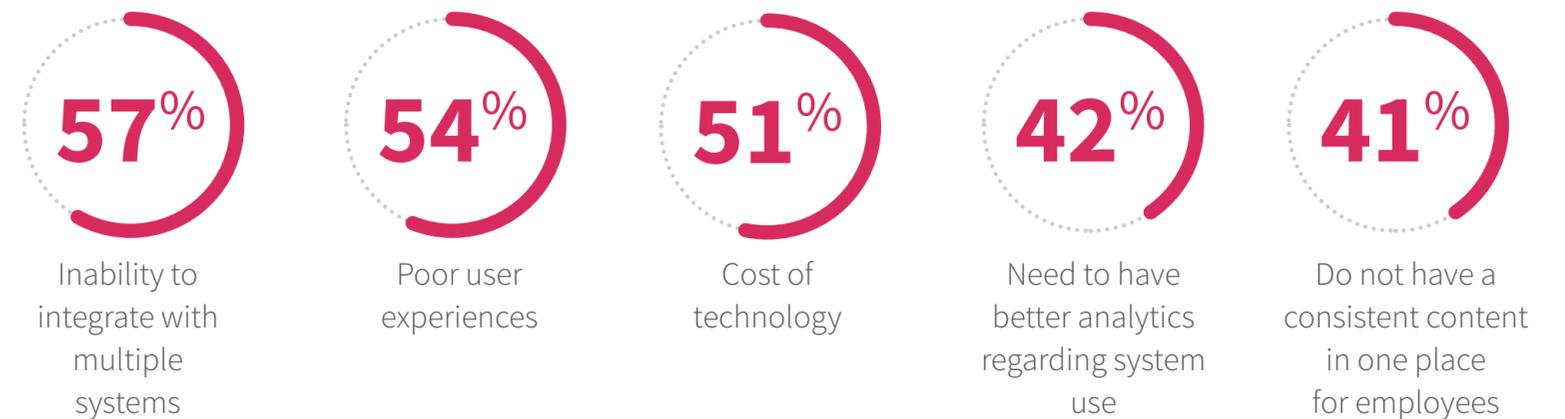
TOP 5 IN SMALL ORGANIZATIONS



TOP 5 IN MID-SIZE ORGANIZATIONS



TOP 5 IN LARGE ORGANIZATIONS



Top Reasons for Switching Learning Platforms

ORGANIZATIONS LOOKING TO REPLACE LMS



Overall



Large Organizations



Mid-Size Organizations



Small Organizations

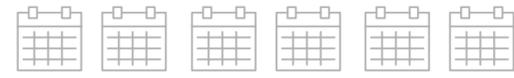


“ According to the Brandon Hall Group, 37% of organizations are looking to replace their current learning management system (LMS). ”

Source: Brandon Hall Group

TIMEFRAME FOR LMS REPLACEMENT

Within 6 months



(Organization Sizes)

Large Organizations **12%**

Small & Mid-Size Organizations **21%**

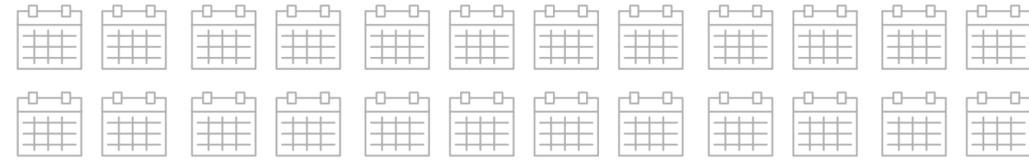
6-12 months



Large Organizations **29%**

Small & Mid-Size Organizations **43%**

Within 2 years



Large Organizations **59%**

Small & Mid-Size Organizations **36%**

IMPROVEMENTS DESIRED FROM SOLUTION PROVIDERS

% of Organizations Overall



Partner in your organization's success



Value proposition/total cost of ownership



Completeness of functionality



Customer/technical support



Implementation capabilities



Product development roadmap

TOP IMPROVEMENTS DESIRED IN NEXT LMS

Large Organizations

Small & Mid-Size Organizations

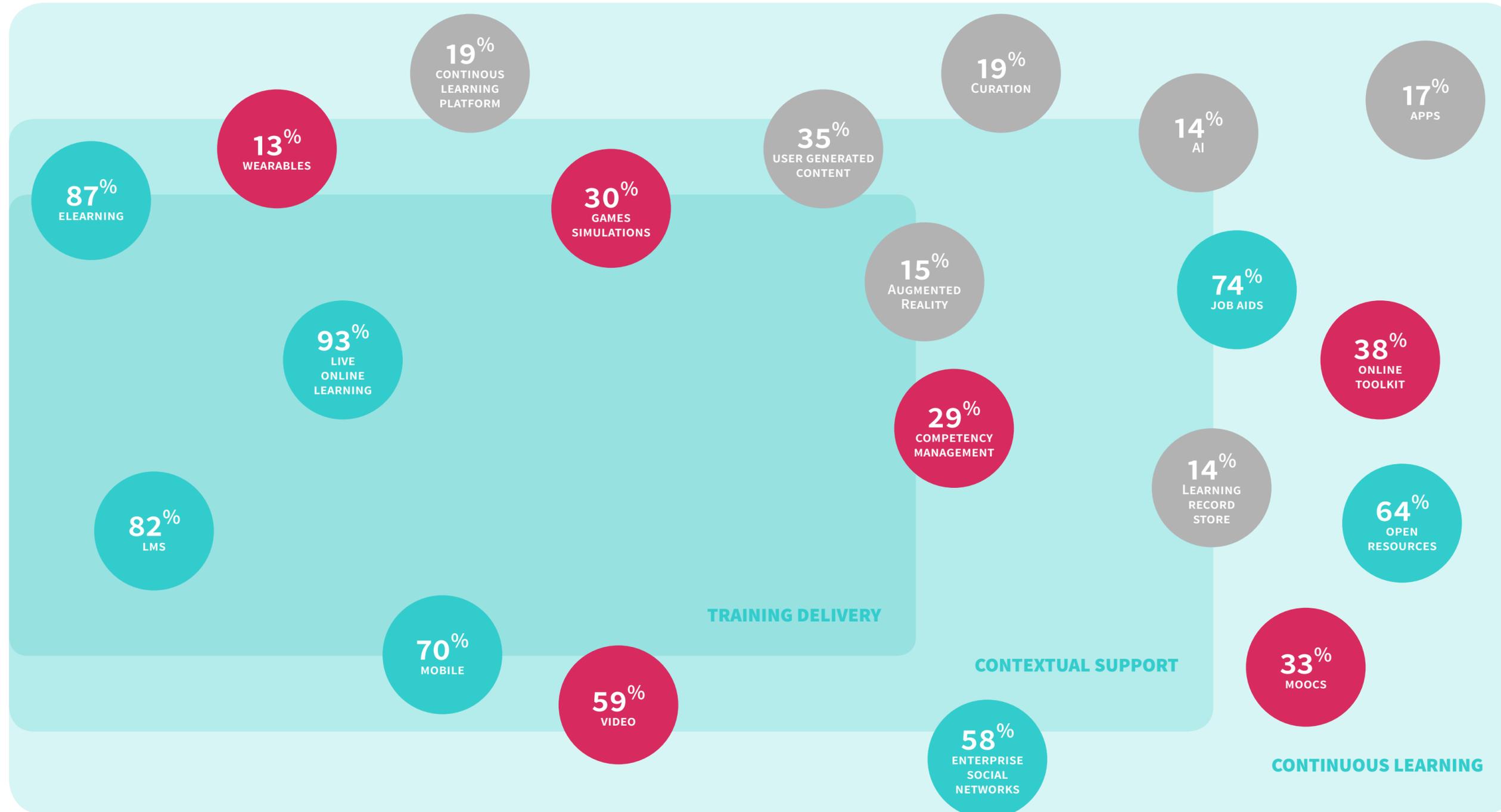


Source: Brandon Hall Group Learning Technology Study 2017

E-Learning Trends

Learning Technology Trends

WHAT TECHNOLOGY ARE L&D INVESTING IN TODAY AND PLANNING FOR 2020?



CONTINUOUS LEARNING
Tools that can support self directed learning in the flow of work.

CONTEXTUAL SUPPORT
Tools that can support application of training back at work.

TRAINING DELIVERY
Tools that can improve efficiency of course delivery.

Which technologies are expecting the most growth by 2020?

- Big Expectations
90-190% growth
- Steady Uptake
55-85% growth
- Approaching saturation
5-30% growth

Source: Towards Maturity

Re-think The Traditional LMS

In just the past few years, learning technology has evolved from a simple LMS, designed to house and manage learning content, to cloud-based systems that offered new functionalities designed to bring organizations closer together, no matter their location, and deliver stronger security functionalities.

But as technologies outside of L&D continue to advance, this is sparking a growing appetite for smarter enterprise learning offerings for both admins and learners.

There is now a wider acceptance of learning technology and a renewed focus on the actual outcomes of learning as an effective way of driving organizational performance, and, therefore, revenue.



THE NEW EXPECTATIONS OF YOUR LEARNERS

1. “WHAT’S IN IT FOR ME?”

Almost 95% of employees say they would stay with a company longer if it invested in their career development, according to LinkedIn [Learning’s 2018 Workplace Learning Report](#).

Millennial employees now make up a heavier percentage of the North American workforce than any other generation. Millennial workers (i.e. the next business leaders of the world) expect learning to be a component of their everyday work lives, and see professional development as a benefit their organization can provide them, holding it in higher regard than higher salaries, in many cases.

3. “I WANT TO LEARN MORE FROM MY MANAGER”

[Fostering a culture that embraces knowledge sharing](#) is one that helps your organization fill information gaps, scale output and productivity, and stimulate the leaders within your ranks.

2. “I WANT MORE CONTROL OVER MY LEARNING JOURNEY”

Traditional learning focuses on a teacher-driven classroom where the student follows the learning path. With [learner autonomy](#), the traditional teacher is removed from the equation and it is up to the student to drive their own learning experience. It is more about a learner’s ability to take charge of their own learning

4. “THE TOOLS I USE TO LEARN BETTER BE HIGH-TECH”

[Mobile learning and micro-learning](#) initiatives have been embraced and encouraged in e-Learning programs as leaders realise that these devices can be used on the job, at the point of need, and help facilitate social interaction. But this is only the beginning when it comes to creating fully immersive learning experiences.

Having a [learning platform](#) completely driven by new technologies such as artificial intelligence is the key to freeing up L&D admins from day-to-day repetitive tasks and giving them the freedom to strategically implement and achieve organizational objectives.

The Rise of the Modern Learning Platform

The Current Learning Technology Landscape

According to a study by Brandon Hall Group, 23% of companies have been using their learning software for over 5 years.

While this may not seem to be a long time, some breakthrough innovations have been made in the last 5 years such as microlearning, social learning and artificial intelligence-powered learning to name a few.

58% of companies are dissatisfied with their LMS because it is outdated and does not meet business needs.

However, [replacing a learning management system](#) is not easy. It has ramifications in terms of both money spent and change in management strategy.

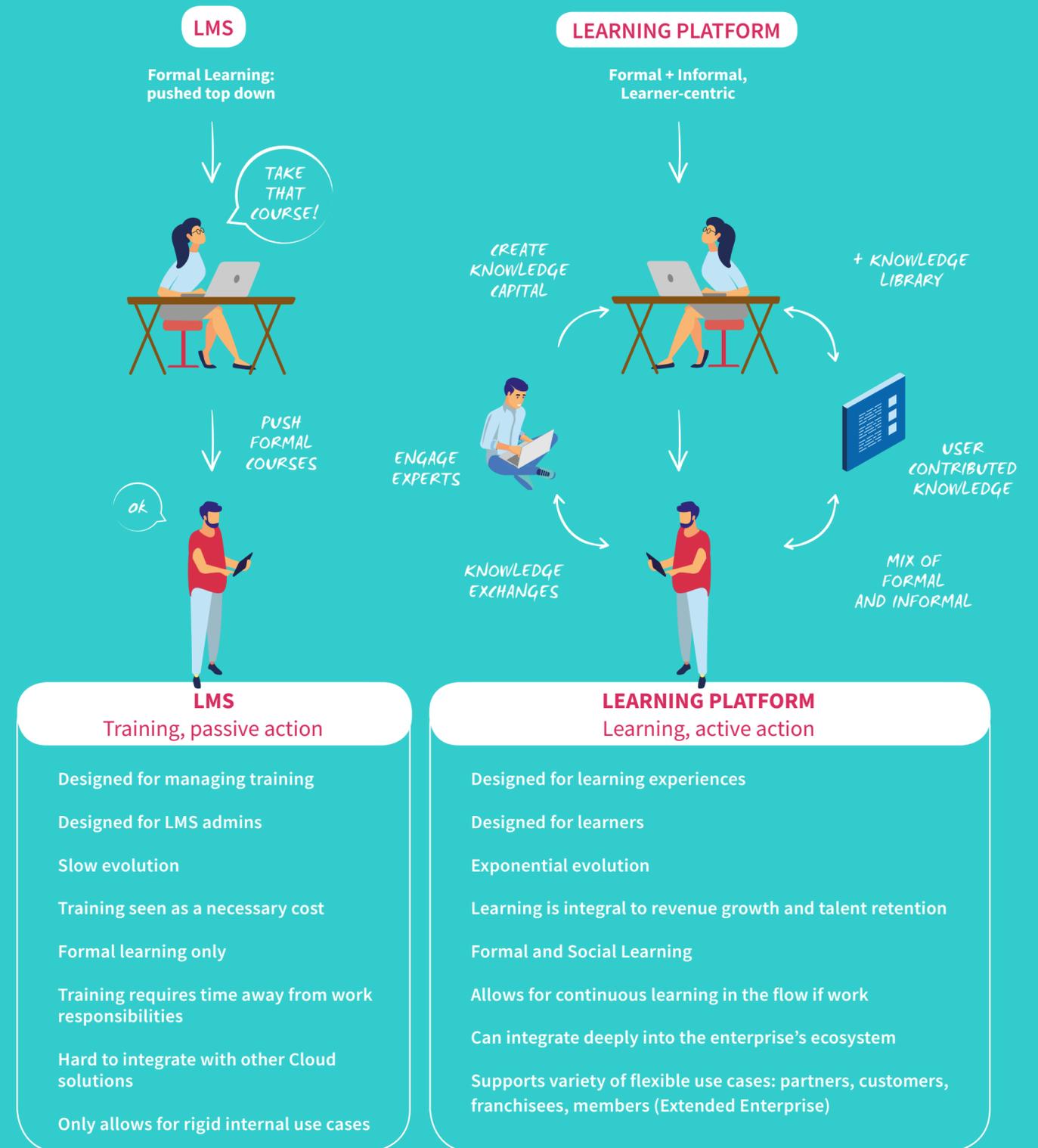
The Problem with Most Learning Content

Employees are not motivated to take courses as they feel the content is not relevant for skills development.

According to a [survey](#), 45% of workers said that “current training offerings aren’t related to employees’ daily responsibilities.” This is a barrier in achieving business goals as driving [employee engagement](#) and retention is crucial to deploying an effective corporate learning strategy.

To empower learners with relevant knowledge that will help them in career advancement, companies need to identify learners’ needs and close [skill gaps](#). With the help of a modern learning platform and suitable content partners, companies can develop and deliver content that will not only help them achieve their business goals but also help their employees achieve their personal goals.

TRADITIONAL LMS VS MODERN LEARNING PLATFORM



docebo

Docebo's Learning Platform facilitates personalized and automated learning experiences in the flow of work to drive growth, organizational performance and revenue. Power a cohesive L&D strategy with a platform built to deliver an unparalleled enterprise learning experience.

[LEARN MORE](#)

Social Learning

Social Learning is no Longer a Theory About The Future

Man is by nature a social animal. This is why social interactions are crucial at every stage of our life. And when we learn, everything is about interactions: we talk to people, we listen to them.

“ We learn by example and by direct experience because there are real limits to the adequacy of verbal instruction...

- *Malcolm Gladwell, Blink: The Power of Thinking Without Thinking*

According to [Towards Maturity](#), an overwhelming 98% of organizations seek to support the sharing and surfacing of internally-produced, user-generated knowledge across the business, with the use of in-house social sharing tools increasing 55% since 2016. Social and collaborative learning tools remain a top learning technology priority among organizations, followed closely by mobile delivery and the data analytics tools needed to make sense of learning platform insights to influence the design and deployment of future learning activities.

70% TO 90% OF ALL WORKPLACE LEARNING HAPPENS INFORMALLY

70% / 90%

87% OF EMPLOYEES BELIEVE THAT SOCIAL KNOWLEDGE SHARING IS ESSENTIAL

87%

ROUGHLY 60% OF COMPANIES USE SOME FORM OF SOCIAL LEARNING

60%

LEARNING HAS CHANGED

OLD WAY



NEW WAY

Company driven

Self-driven

Compliance

Personalized & relevant

Event-based

Anytime and anywhere

Classes and completions

Social and collaborative

Knowledge acquired

Knowledge applied

Source: Brandon Hall Group

The Proof is in The Pudding

75:1

Social learning approaches have a 75:1 ROI ratio compared to formal web-based training.

[Association for Talent Development](#)

Need proof?

[Course completion increased to 85%](#) on HBX, a Harvard Business School online education initiative when it introduced social learning.

[82% of businesses that use social learning tools](#) want to increase their use in the future.

Productivity gains enabled through using a social learning platform can be as high as 35% by being able to connect with others using social tech, according to [McKinsey](#).

Organizations leveraging alternative training models like social learning and 70-20-10 reap these benefits:

300%



MORE LIKELY TO REPORT IMPROVEMENTS IN STAFF MOTIVATION

400%



MORE LIKELY TO RESPOND FAST TO BUSINESS CHANGE

500%



MORE LIKELY TO BE ABLE TO ATTRACT TALENT

Vision Hospitality Group is using Docebo Coach & Share to enable social learning across a remote, spread out workforce.

[DOWNLOAD THE CASE STUDY](#)

Social Learning & the L&D Holy Grail: Engagement

The future of social technology can be summed up in one word: “engage.” Humans are compelled at a very primal level to seek out social engagement and approval. The ability to tap into that desire is what will allow the next generation of learning technology offerings to succeed where previous iterations may have failed to live up to their promise.

If social is viewed in terms of how it can engage employees, then its role becomes less about delivering content and more about helping employees and connecting with them.

The future of social technology lies not in any single platform or tool, but in how these technologies lead to interactions within the workforce and how they are used within common processes. The ultimate goal is a learning experience that is both appealing and highly impactful.

Employee Disengagement is Costly

Unproductive employees cost an average of \$3,400 for every \$10,000 of their salary, according to Gallup. Further, the same research suggests that 17.2% of a company’s workforce is disengaged.

So, what is the cost of disengagement anyways? Let’s do some fast math:

Say your company has 1,000 employees. The median salary is \$50,000 across those 1,000 employees. 17.2% of 1,000 would equal 172 employees.

So, based on the cost of disengagement according to Gallup’s research, those 172 disengaged employees are costing their organization \$8.6 million in lost productivity every year.

ENGAGEMENT = KNOWLEDGE RETENTION



Stay relevant

Nothing kills knowledge retention faster than meandering course material.

Stay focused — and your learners will be too. Don't just stay relevant to your core material, stay relevant to your employees' needs. Explain how the skills you teach them will help them in their everyday work, and do so with actual examples.



Keep it simple

Your learners don't have the time to decipher complicated verbiage and serpentine sentences.

If you can say it with a picture or a video, do so. They are more engaging than streams of text. Avoid complicated expressions and academic language.



Encourage repetition

Strategically repeating key insights and core information improves knowledge retention.

But, don't assume your learners will understand their material immediately. If a point is important, hammer it on until you're certain they've got it.



Make learning bite-sized

Serve your employees' bite-sized chunks of training material that they can consume anywhere and at any time.

A native mobile app is a great way to make sure this is possible. If you don't have one, it's something that should definitely be considered.



Make it playful

Employee training statistics and research keep showing that microlearning increases knowledge retention and learner engagement – so you'll be hitting two birds with one stone. Adding an element of fun in your training shouldn't be difficult – even if your jokes are limited to the cringe-worthy “dad joke” variety.

Social Learning Trends to Consider For The Very Near Future

Gamify, Incentivize, Engage, Reward

Recognize the potential gamification has in your social learning strategy. Create incentives or rewards for successful training outcomes to effectively engage learners and increase the effectiveness of learning.

Artificial Intelligence Extends The Reach of User-Generated Content

Powered by unique learning specific algorithms, AI will elevate the social learning experience within your learning platform by ensuring informal, user- and SME-generated content is discovered by learners who will value it most. Consider an Invite-to-Watch feature, for example, which automatically generates a list of those within your organization who might find a particular piece of content interesting – the moment it's uploaded. Algorithms would instantaneously analyze that new content and the historical learning patterns of individual learners that would benefit most from consuming that content. Better yet, as the system is fed more content, it gets better at identifying patterns within new content and learners to produce more effective social learning experiences.

Enable Independent Learning – Anytime, Anywhere

Today, our smartphones may as well be super-glued to our hands. Leverage that with your learning activities. After all, if you're doing it right, there's a major opportunity to influence more positive learning outcomes (and bumping up learner engagement) by making use of the mobile training rooms designated to their pockets.

Don't Seek to "Deliver" Training, Spark a Desire to Start Conversations

Considering that it's harder than ever to engage learners with traditional training and e-learning methods, there's a case to be made for creating learning that fits the way learners already behave.

[Campaign learning](#) makes the most of social and mobile learning by delivering bite-sized learning assets to mobile devices. These assets don't seek to deliver training, but instead spark conversations that encourage your learners to think and discuss the learning objective. In other words, campaign learning has grown into an ideal way to capture informal and social learning, and put it to good use with the help of the latest learning technologies, platforms and delivery methods.

Campaign learning:

Improves knowledge retention: The infamous forgetting curve tells us that we tend to retain only 10% of new information a week after discovering it. Campaign learning, enabled by its nature as a series of regular events, can help your learners retain more and eliminate knowledge loss in its tracks.

Establishes a culture of learning: Use learning campaigns to push regular training content, keeping it at the front of your learners' minds.

Encourages autonomy: Treat learning campaigns like a daily invitation for your learners to engage with training content.

Creates relevant learning assets: Eliminate a heavy reliance on formal content by treating learning campaigns as a seed for user-generated content. Because it comes from your people, whom your learners might even recognize, bite-sized content will carry more weight.

Unveils hidden experts: By delivering training in a bite-sized campaign, your hidden experts have more chances to demonstrate their expertise.

docebo

DOCEBO COACH & SHARE

Encourage users to share their knowledge through social and experiential learning across the organization to foster a true sense of community.

[LEARN MORE](#)

Skills Management

Arming Your Workforce with the Right Skills

Managing skills in the digital age means harnessing technology to enable a data-driven approach to lifelong learning and smarter upskilling.

To meet the challenges organizations are facing related to skills and the fact their needs are changing continuously, they need a robust strategy designed to effectively upskill their existing workforce, as it is not enough to rely solely on recruitment. In fact, nearly 90% of HR and learning leaders feel skills gaps continue to grow.

Employers Know There's a Problem to Fix

67% of employers are concerned about growing skills gaps.

Negative impacts of extended job vacancies:

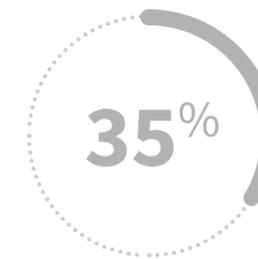


CareerBuilder survey

Creating a flexible and adaptable workforce in today's business environment must recognize that employees will only consider variable job transition options. For example, they won't move to a role where compensation is far less than what they're used to.

Connecting Learning to Performance

THE BENEFITS OF A SKILLED WORKFORCE INCLUDE:



35% reduction in time spent searching for sales content.



22% faster rollouts of products and processes



Up to 80% of managers believe effective training is critical to project success and meeting project deadlines



\$70,000

Skill levels linked to business value result in \$70,000 in annual savings and a 10% increase in productivity when teams are well trained.

Source : IBM

The [mismatch between skills and organizational needs](#) continues to grow, with the digitization of business to blame. On the other hand, businesses need to get better about building and developing existing employees, while reducing their reliance on the external labour market and associated recruitment costs.

One way to do so is by tailoring development to meet the organization's skills requirements of the future and anticipating how those needs will change and continue to evolve over time. For example, developing a strategy that focuses on upskilling hard-to-fill positions might be effective in reducing turnover and retention issues, and the time it might take to fill that position should an existing employee leave.

How to Connect Learning to Performance

- **Establish personalized learning and development [plans](#):** Aim to understand each employee's role instead of viewing employees as a group. Seek out opportunities to deploy a [blended learning](#) approach, in which employees upskill with content that's delivered in formal, social and experiential learning formats.

- **Include real-life scenarios: [Offer learning opportunities](#)** that put the concepts and experience your employees will encounter into practice. For example, if you're looking to enhance your inbound marketing techniques, have existing employees listen to calls, get their feedback and see how their thinking could improve the process.
- **Don't forget branching scenarios and gamification that centers on skills:** Try to make e-learning activities as close to real-life as possible by integrating real-world images, characters and scenarios with gamification to encourage engagement.
- **Take it one skill at a time: Don't overwhelm learners.** Do your best to understand how you can fill your [skills gaps](#) by assessing your employees' existing abilities and compare them to the desired result. Improve retention by integrating previously acquired skills into proceeding modules – let them apply what they've learned!
- **Give them opportunities to access [supplemental learning](#) resources:** This is a great way for learners to consume content that's related not only to their upskilling activities, but also those that satisfy their personal interests.

Should You Hire or Train?

The cost of replacing employees is significant.



Each time a business replaces a salaried employee, the cost of replacing him/her can be equal to 9 months salary. So, if a manager earning \$40,000 leaves your organization, it might cost up to \$30,000 in recruitment and training costs to replace that person.

Upskilling as a tool to encourage employee engagement and retention presents a clear benefit to not only your organization's bottom line but also to the well-being of your workforce, especially as it relates to performance.

They need the tools to go above and beyond, especially when it comes to skills. Doing so requires the ability to facilitate upskilling effectively via e-learning programs that centre on upskilling from the get-go.

Developing Soft Skills

According to LinkedIn's Workplace Learning Report, 92% of executives believe soft skills are equally important or more important than technical skills and yet, 89% of executives say that it is difficult to find people with soft skills.

Executives identified soft skills training as the most essential skillset to cultivate through talent development programs.



Of executives say that soft skills are equally important or more important than technical skills.



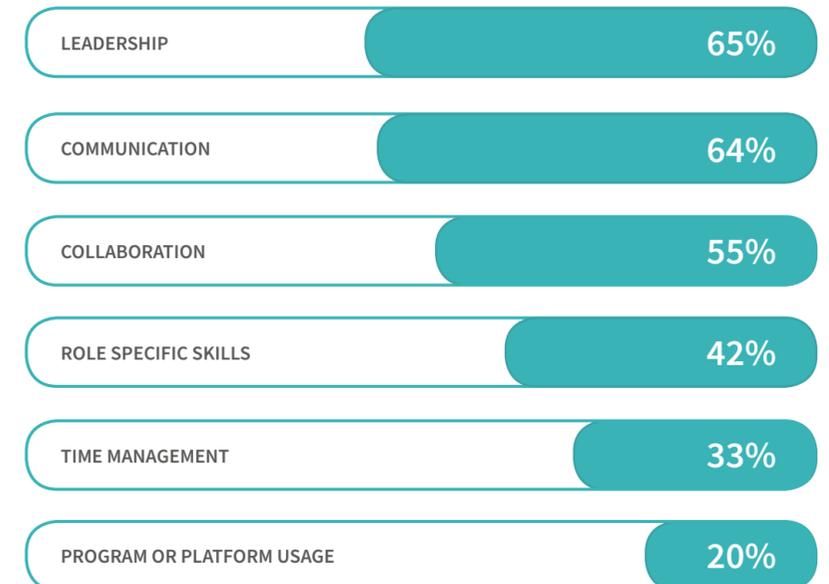
Of executives say that it is difficult to find people with soft skills.

Source: LinkedIn Learning, Workplace Learning Report

WHAT ARE THE TOP PRIORITIES FOR YOUR L&D PROGRAMS IN 2018?

- 1 HOW TO TRAIN FOR SOFT SKILLS
- 2 CONSISTENT VALUABLE GLOBAL TRAINING
- 3 DELIVER INSIGHTS ON INTERNAL SKILL GAPS
- 4 HOW TO TRACK SKILL DEVELOPMENT
- 5 HOW TO ACCESS SKILL COMPETENCIES
- 6 UNDERSTANDING THE IMPACT OF TECHNOLOGY

WHAT ARE THE MOST IMPORTANT SKILLS FOR EMPLOYEES TO LEARN FROM L&D?



Source: LinkedIn Learning, Workplace Learning Report

Bridging Skills Gaps

How do you bridge these skills gaps?

The short answer is that you might not have the hard knowledge you need, and instead rely on managers, HR and the L&D team to equip your team members with the right skills.

Traditionally this has been addressed using a trial and error-style approach, which might look something like this:

- HR or L&D assigns training courses to staff
- Staff do the training and are then evaluated to see if any improvement has been made.

Thing is, technology and business landscapes are constantly evolving, typically at a pace most businesses can't maintain, and so too are the skills necessary to manage such fast-paced change.

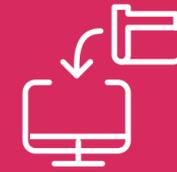
[46% of executives](#) believe the workforce isn't receiving the training necessary for their businesses to succeed.

Another way we've seen organizations trying to solve the problem is by using archaic systems that are not only complex to set up, but also take a long time to produce any actionable data and results. This is both inefficient and time-consuming.

According to a [report by the World Economic Forum](#), in collaboration with The Boston Consulting Group, managing skills in the digital age requires organizations to harness technology that enables them to leverage a data-driven approach to lifelong learning and smart upskilling.

Doing so requires learning and development professionals to play an important role in fostering a culture of continuous learning within the organizations.

LMS VS. LEARNING PLATFORM: WHAT'S THE DIFFERENCE



LMS

Focuses on the **management** of things (courses, learners, reports, etc.)



LEARNING PLATFORM

Facilitates a holistic approach to enterprise learning, with an LMS at its core, to enable formal, social and experiential learning, as well as skills management, to link learning to overall organizational performance.

Within your modern learning platform, it will be necessary to introduce capabilities that give employees and managers a way to assess skills, manage roles, and assign specific learning activities to equip people that have skill gaps in specific roles.

An easy-to-use environment that enables organizations to identify skills gaps and gives L&D and HR leaders a way to serve up hyper-targeted learning content is essential.

Let's say you need to fill a new position. You wonder if there is anybody in your company whose skills are close to the skill required for that position. Artificial Intelligence is now being used to power a search engine within your learning platform which finds employees whose skills and proficiency levels best fit a given role, which informs your hire vs. train decisions.

This way, you're guaranteed to not only close those gaps, but equip learners with the skills they need for themselves and the organization to succeed in the future.

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DOCEBO PERFORM

Prepare your employees and improve performance by targeting your learning programs to the current and future needs of your organization with Docebo Perform.

[LEARN MORE](#)

Mobile Learning

Mobile Learning Market Outlook

“ Today one-in-five American adults are “smartphone-only” internet users – meaning they own a smartphone but do not have traditional home broadband service...

– Pew Research

The appetite for mobile learning has grown into a consistent growth over the past eight or so years, now reaching a point where it's no longer a nice-to-have, but instead, a must-have. The benefits of mobile learning (m-learning) are well-known for organizations both big and small, especially as it relates to improved knowledge retention and increased employee engagement. Already, mobile learning is being used by nearly [47% of organizations worldwide](#), clearly reflecting the increased acceptability of the modality and why it is viewed as the future of learning.

MarketsandMarkets forecasts the global mobile learning market to reach [\\$37.60 billion by 2020](#), growing at a CAGR of 36.3%. North America will be the largest player in terms of market size, followed closely by Europe and Asia-Pacific, both of which are expected to see significant upticks in the deployment of mobile learning technology and delivery.

NEED PROOF MOBILE LEARNING WILL BE CORE TO GUIDING YOUR LEARNING ACTIVITIES OF THE FUTURE?



Of learners find accessing their training content from a mobile device essential



Of learners see improved productivity levels compared to non-mobile users



Of smartphone users download apps, 50% of which are used for learning



Of learners use mobile learning before they go to sleep at night



The number of mobile-only users (27%) has grown, now surpassing desktop-only users (14%)



Of Millennials say they connect more with mobile learning than L&D activities delivered via desktop or formal methods



The average person spends 2 hours and 51 minutes on their smartphone each day, looking at it roughly 221 times and touching its screen more than 2,600 times



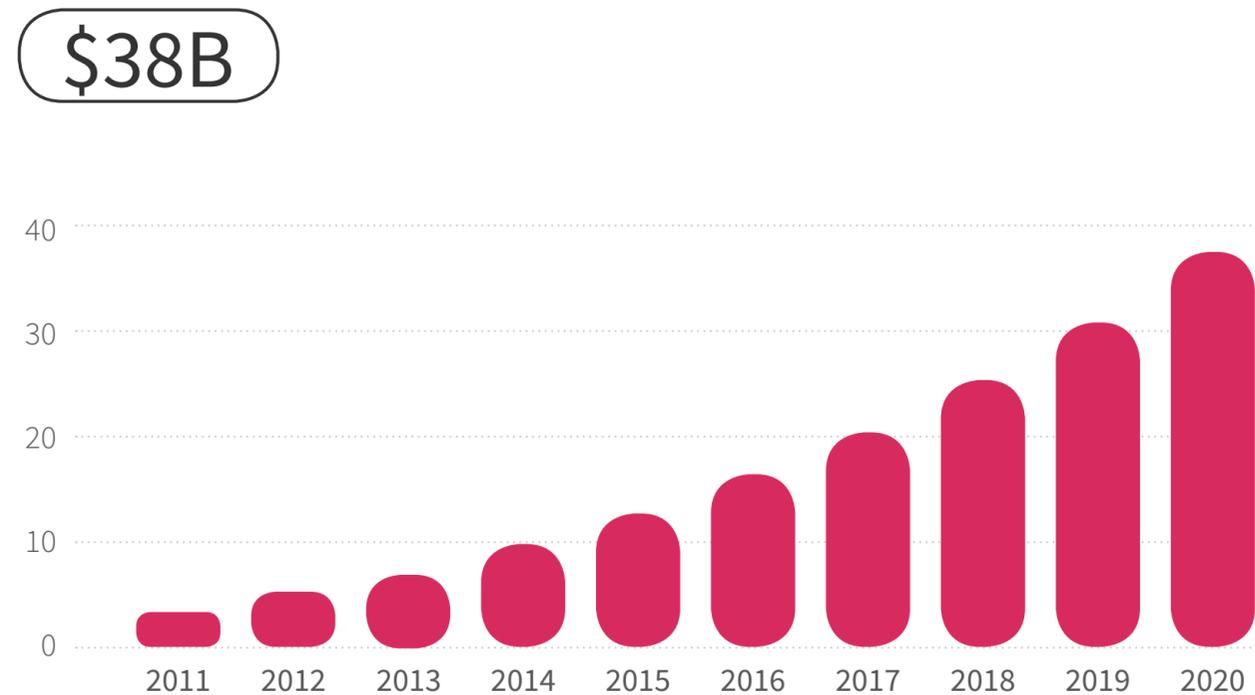
Smartphone learners complete course material 45% faster than those using a computer

These factors are even more important when you consider the fact that workforces around the world are at a crossroads, on which Baby Boomers and Gen-Xers are retiring (or preparing to), and are making way for the mobile-first Millennial and Gen-Z cohorts.

Indeed, Millennials made the need for mobile learning clear, Gen-Z will be the generation that forces organizations to perfect it.

The future of mobile learning might look a little different than you'd expect and is still evolving, but it will live up to the hype and likely exceed it.

MOBILE LEARNING MARKET BY 2020



Source: Transforming learning through m Education. McKinsey

Mobile Trends Guaranteed to Influence Your L&D Programs in 2019

1. It's All About BYOD

With the proliferation of mobile devices in the learning space, it's only logical that the bring-your-own-device movement will continue to expand, as learners expect the kind of flexibility and consistency learning on their own devices provides them. While some organizations have been hesitant to allow employees the freedom that comes with using personal devices and the potential of associated security risks, many are finding the balance between freedom and control for work-related duties, including learning.

Benefits of BYOD for mobile learning include:

- Positive work environment
- Increased productivity
- Reduced costs

2. Mobile-first design plays a more important role in learning content delivery

The ways of mobile-first design are well known in the web development space, particularly as it relates to responsively designed websites. These are websites that are rendered to appear the same whether you're viewing them on a desktop or mobile device. In the age of mobile-learning, mobile-first design will play an important role in content delivery because we must consider how

53%

“53% of learners say location or IT is a barrier to online learning – so they turn to mobile, with 64% concluding that learning on a mobile device is essential or very useful...”

– *Towards Maturity*

learners consume content in their everyday lives. Learners expect the kind of flexibility mobile-friendly delivery gives them, so developing a strategy that optimizes content for mobile devices is key to connecting with your employees, both new and old.

3. More companies use mobile to deliver formal learning

While we'd generally associate formal, traditional learning with hour-long classroom instructional sessions, mobile delivery will enable L&D administrators to deliver those courses virtually, in bite-sized content nuggets. A robust learning platform enabled with content tagging capabilities makes them searchable and more effective, especially on the go. Meanwhile, this kind of approach also assists in generating individual learning paths with actionable and effective learning content designed to meet the needs of individual learners.

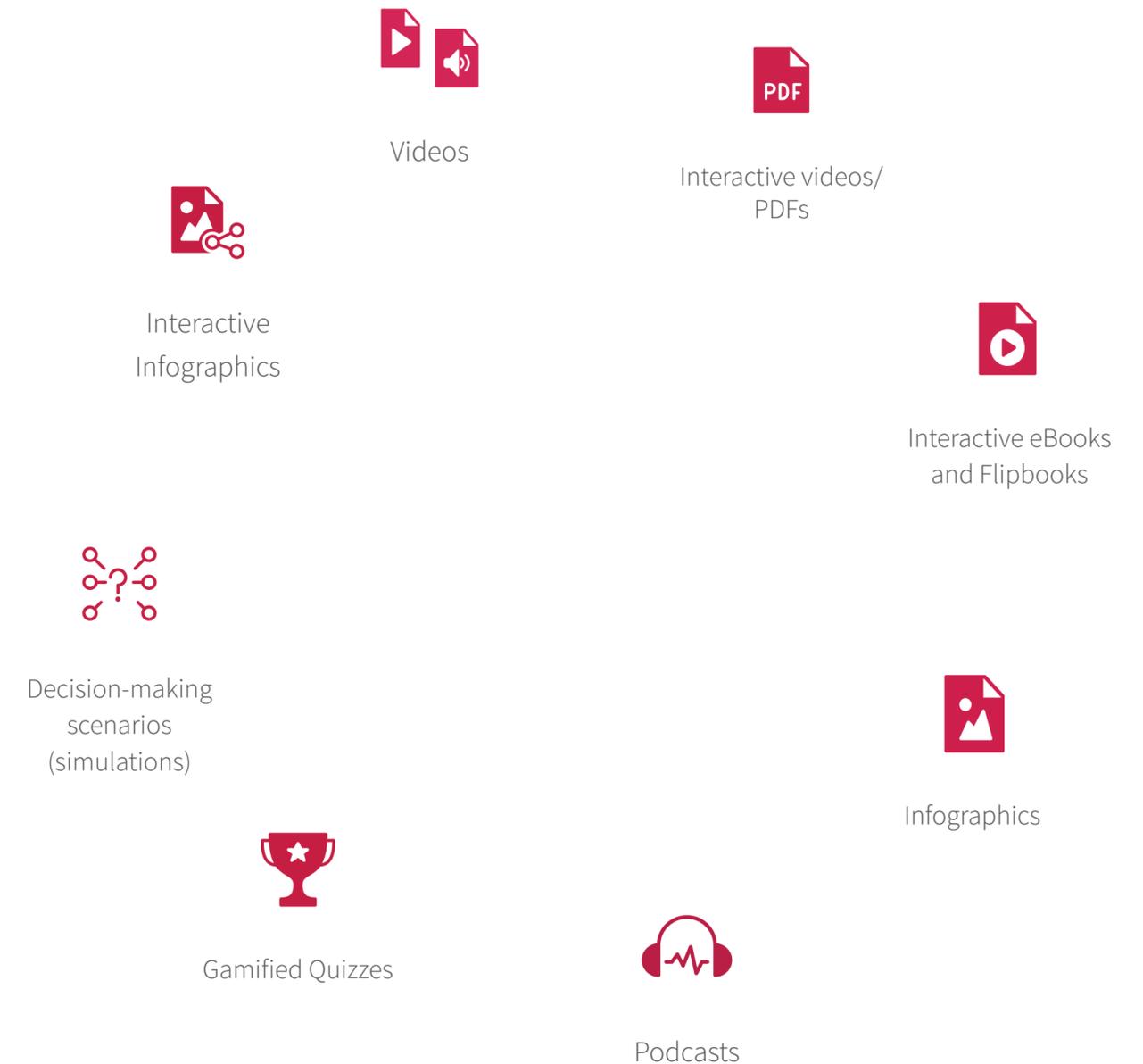
4. [Video] content is king

Mobile learning will increase the use of video-based training exponentially thanks mainly to its ability to deliver higher rates of engagement and improved learning experiences in both formal and informal formats.

Consider quickly how you might currently go about learning a particular skill or piece of knowledge in your personal life. If you're like many people, YouTube tutorial is a first and likely a one-stop location for information. If you consider YouTube as a benchmark for how people consume content on mobile, more than half of the 1 billion hours of YouTube video viewed daily happens on a mobile device, averaging 1,000,000 mobile video views daily. Additionally, "how-to" searches have increased consistently 70% year-over-year, directly contributing to the discovery of over 100 million hours of "how-to" content uploaded to the platform in the same year.

5. Meanwhile, more content formats will become optimized for mobile learners

MOBILE LEARNING FORMATS GUARANTEED TO BOOST LEARNER PERFORMANCE



6. Wider adoption of gamification

Why gamification and mobile learning go hand-in-hand:

It gives employees control (and motivates them to complete their training): Gamification elevates mobile learning by producing learner-centric experiences that incorporate exploration and decision-making activities.

Increased engagement (and extend it to other learners with a social media-like feel): Tap into their inherent competitive nature, while encouraging them to start discussions with other learners based on the results to extend the learning experience.

Establish a positive relationship with learning: Gamification has an organic way of providing enjoyment for learners, producing a shift in attitude for learners that encourage them to view learning positively. Couple that with a BYOD policy and you're giving yourself a way to overcome a negative learning culture and increase self-empowerment by giving learners even more control over their experiences.

Maximize ROI: Success depends on content delivered effectively, via short learning modules, apps, videos or games. This is a circumstance in which an experienced development team can show its value by using this powerful duo to maximize the use of your training budget and learning efficiency.

7. Personalization plays a bigger role in guiding learning paths

Personalizing learning paths makes learning more effective for your learners and, when combined with mobile learning, can deepen its granularity to further increase its effectiveness, whether its job-role based or based on self-assessments of specific proficiencies.

8. Up your social learning game

Giving learners a way to contribute to their learning experiences is not only an incredibly effective way to improve their engagement with your learning activities, it encourages them to put some skin in the game to further enrich your learning program. Their contributions may support existing training programs and will grow to become value-add materials to assist in the growth of your social and collaborative learning efforts.

9. Offline learning becomes the new online

While mobile learning is the tool learners need to take their training activities on the go, offline learning is the key to truly offering learning anytime, anywhere. Your learners want to be able to learn no matter the circumstance, even if that includes the lack of an internet connection. A learning platform that gives them a way to learn offline and then sync their progress automatically once back online is by far the best way to enable learning on-the-go and makes sure that not a second of data derived from the learning goes uncaptured by your learning platform.

10. AI eliminates administrative barriers while improving overall learning experiences

Advances in artificial intelligence and learning technology will grow to play a critical role in the delivery and effectiveness of learning content while eliminating cumbersome administrative barriers. This will allow administrators to focus on what's important: creating great learning content. AI is an exciting development that is guaranteed to produce incredible benefits to the learning space.

(A Large Part of) L&D's Future Belongs to Mobile Learning

Mobile devices aren't simply a part of a new reality, they've taken over in the way people consume content. Mobile learning is now a must-have if you're going to connect with not only the fresh-faced workers of the future but also those wily veterans ripe full of knowledge that you should be leveraging as knowledge capital to share across your organization.

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Enable learning wherever, whenever with
the Docebo Mobile Learning (*for iOS/ Android)

[LEARN MORE](#)

Generation Z

Is Your Learning Strategy Ready for Gen Z?

Your entire learning program could be obsolete by next year.

But it won't be because the learning technology used to power existing L&D strategies will fail to adapt

Instead, the way enterprise learning programs will be shaped over the next few years will be in response to a generational shift, one in which a new cohort of fresh-faced and bright minds will enter the workforce, forcing organizations to re-think what's important when it comes to linking professional development to organizational performance.

And no, we're not talking about Millennials – by today's standards, they're old news. There's a new generation that demands our focus and attention – one that, by 2020, will make up 20% of the global workforce.

While close in age to Millennials, Gen Zers have more in common with Gen Xers, workplace-wise at least. According to research by Accenture, Gen Zers demonstrate a “return to more traditional workplace values,” which includes a desire for a clear, stable career path and (shockingly) a preference for communicating with their colleagues face-to-face rather than online.

Anatomy of Gen Z



Gen Z will enter the workforce with an instinctive and expert knowledge of all things digital, where their managers won't have to show them how things work, but instead how technology can elevate them - including their learning activities. More than 60% of Gen-Z'ers share knowledge online, in the form of YouTube videos, blog entries, or Medium articles.

Gen Z are more open than ever to bring-your-own-device workplaces, which will change the way organizations design their learning activities. They also expect to know what the intended outcome of learning is, very clearly upfront, so it's critical that these outcomes are outlined from the get-go.

Designing L&D for Gen Z

Here are a few factors L&D leaders must consider when designing learning programs for Gen Z:

- **Be as authentic as possible:**

Defaulting to a corporate identity that sounds manufactured and produced won't connect with marketing-savvy, brand-way Gen Z employees, who will instead see it as unctuous and inauthentic.

Create training scenarios that leverage external speakers for seminars and workshops (formal training), and allow Gen Zers to bring their own personalities into e-learning activities.

- **Embrace collaboration and competition:**

Learning programs that connect with Gen Z are those that create frequent opportunities for both on-the-job and formal social training. This gives Gen Z workers opportunities to problem solve, brainstorm, and form important relationships with employees from other generations.

Connecting the values important to Gen Z (equality and innovation) to training to establish important interactions with co-workers to remove social barriers.

Incorporate gamification features that foster a healthy dose of internal competition. Doing so not only boosts morale but also improves overall training ROI as learners compete to beat benchmarks set by fellow learners.

Consider the popularity of video games, such as [Fortnite by Epic Games](#). This game relies primarily on social gaming and the need for team collaboration to ensure a victory – Gen Z'ers crave these kinds of environments where they can be hands-on and directly involved in the learning process – especially if these learning opportunities are enabled by technology that's available any time, anywhere.

Globally, [the technologies that Gen Z and Millennials want their employers to incorporate into the workplace](#) include:

SOCIAL MEDIA

WEARABLES

VIRTUAL REALITY

In today's enterprise learning environment, the level of personalization in an employee's learning plan can be the make or break point between retaining and losing talent. By allowing employees, especially those from Gen Z, to provide their inputs into these plans, this allows organizations to leverage and understand the skills they already have and identify ones they need to work on.

“ Despite the introduction and proliferation of new technologies at work, Millennials and Gen Z value the in-person communication that comes with a traditional corporate office much like older generations do. At the same time, they also seek flexible hours and telecommuting that two-thirds of companies still fail to offer. Companies that want to successfully recruit, retain and grow their young talent must look to corporate culture as their competitive advantage moving forward.

– Dan Schawbel, Research Director at Future Workplace and New York Times bestselling author of Promote Yourself

L&D as Talent Bait

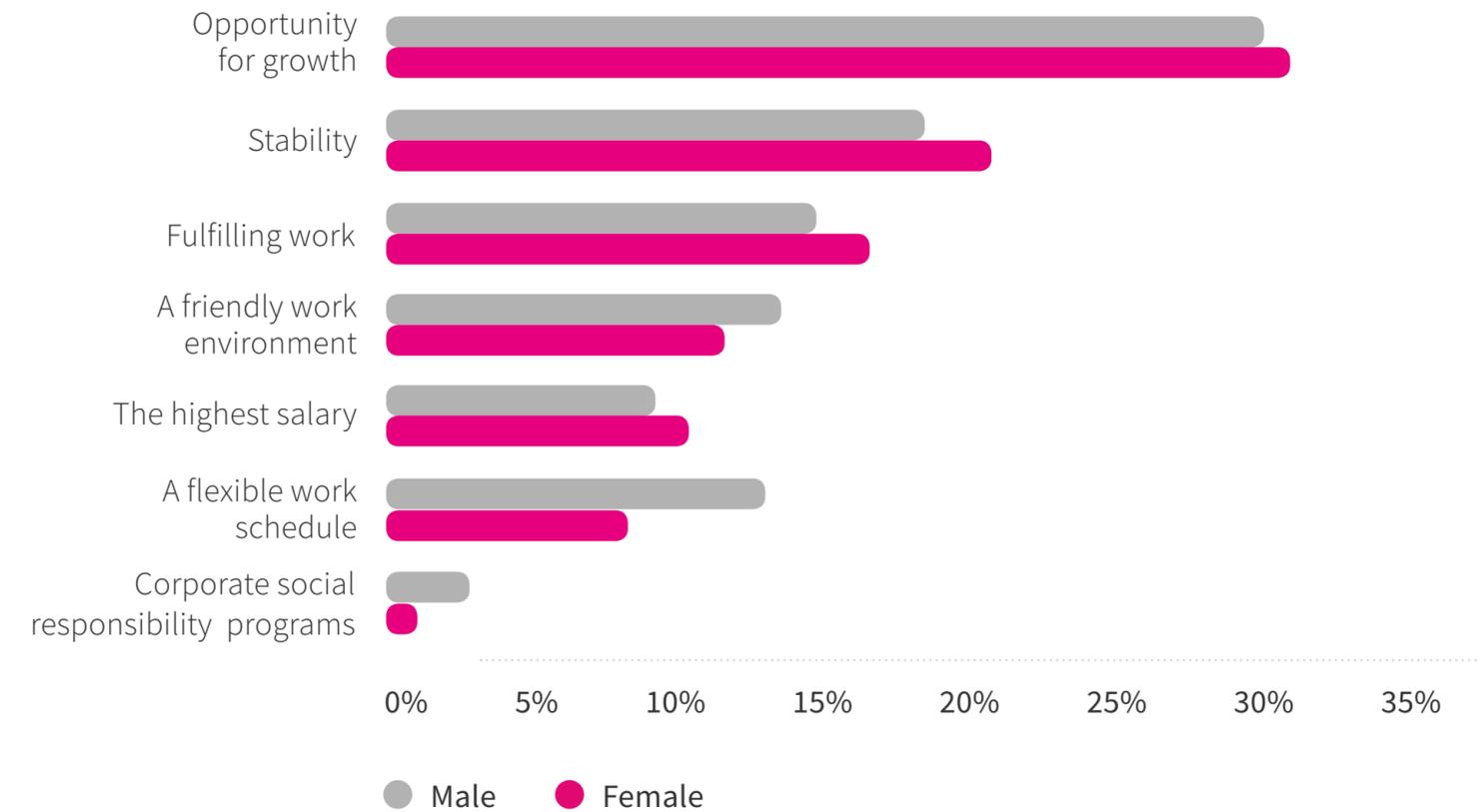
“ Other than paying down student debt, opportunities for growth and development in the workplace are a top concern for Gen Z – even more so than salary...”

Source: Adecco Staffing USA

As Gen Zers enter the workforce, their expectations and desires are far more geared toward growth opportunities. Job stability, fulfilling work, a friendly work environment, flexible hours, and a high salary are much further down the list.

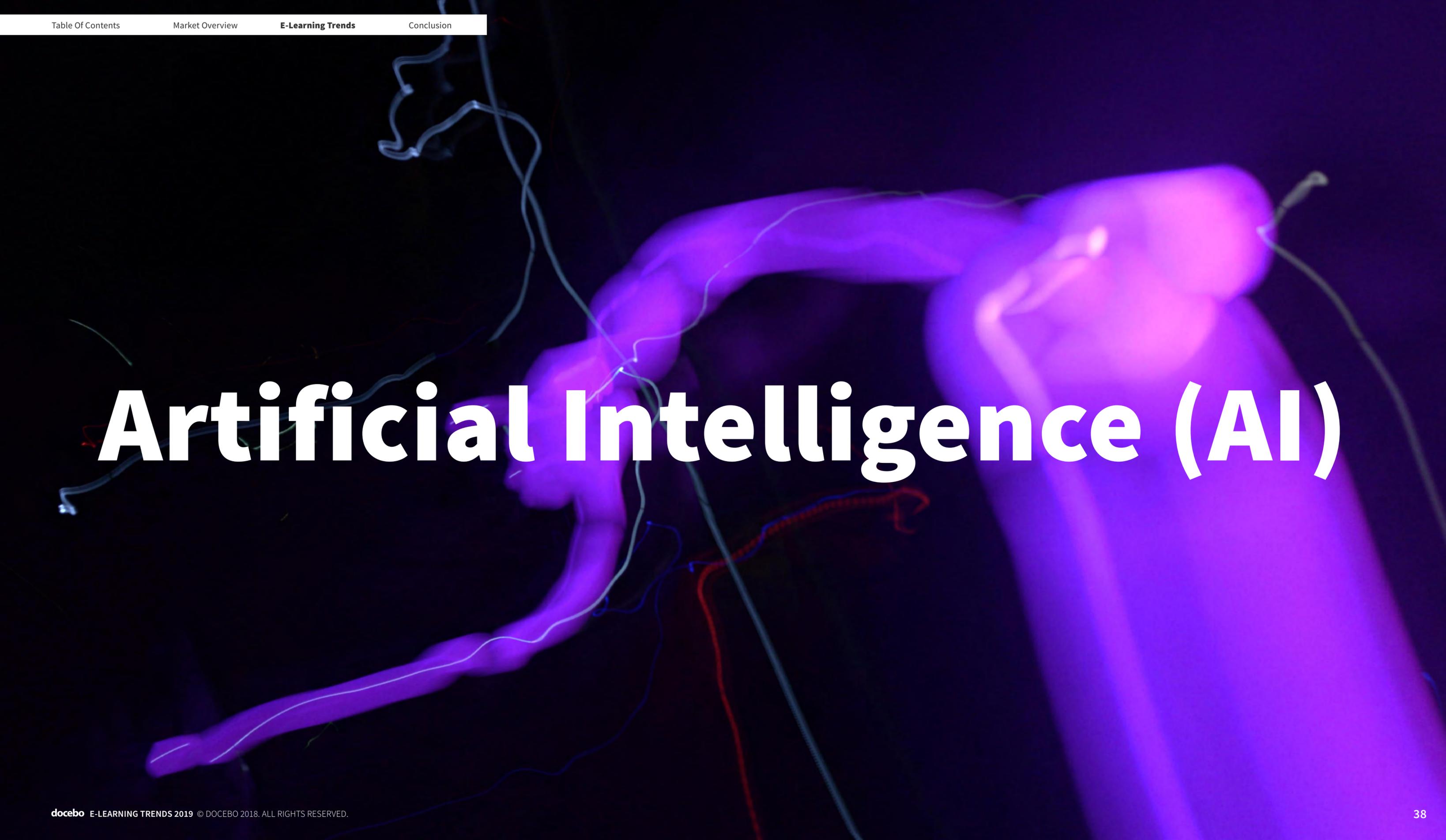
Encourage new employees to share strengths and weaknesses, give them opportunities to assume more responsibility, and demonstrate a willingness to listen and participate in their development. Doing this will significantly help your efforts to attract and engage Gen Z.

MOST IMPORTANT DESIRE FOR FIRST PROFESSIONAL JOB



Source: Modis

Artificial Intelligence (AI)

A stylized, glowing purple and blue hand holding a glowing purple sphere, set against a dark background with faint, glowing lines.

So, What is Artificial Intelligence (AI)?

Put simply, it's an area of computer science that aims to perform tasks commonly associated with intelligent beings such as problem solving, recognizing things, finding patterns and adapting to changing circumstances.

AI's Purpose in Enterprise Learning:

To enable automated and personalized learning – at scale - by simulating human behavior, natural language and reasoning.

A survey of 3,000 business leaders by [Boston Consulting Group and MIT Sloan Management Review](#) found that many executives understand AI's potential, but have yet to put a strategy that leverages it into action. Here are some of the most interesting findings from the survey.

75%

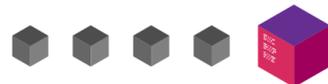
Of executives believe AI will enable their companies to move into new businesses

85%

Almost 85% believe AI will allow their companies to obtain or sustain a competitive advantage

60%

Over 60% of all companies don't have an AI strategy in place



Only about one in five companies has incorporated AI in some offerings or processes

Artificial Intelligence Makes L&D a Competitive Advantage



“Artificial intelligence (AI) now plays a part in many facets of our lives. Whether it's virtual assistants giving you weather and news updates when you roll out of bed in the morning or having a new TV series or movie suggested to you based on past viewing habits by an invisible algorithm, AI is more ingrained in our lives than we might give it credit for. But, pigeonholing AI as a tool that merely suggests content is a shallow interpretation of the technology's potential. AI makes learning personal. It makes learning relevant, with insights based on data, on user behaviour and on preferences – not simply what others “liked.” AI changes enterprise learning's status-quo with an incredible ability to deliver automated and truly personalized learning (at scale) to completely change the way people learn...for the better.

And while we might only be scratching the surface in AI-powered enterprise learning, we will soon live in a world where learning is powered by sets of specialized algorithms (each responsible for a different task, such as analyzing/reading content, extracting video “pills” and re-aggregating them into courses based on various learning preferences and styles), that will exponentially improve the personalization of learning. In fact, it's an absolute certainty that AI will not only produce a learning platform capable of delivering personalized learning environments with content that adapts as necessary (on its own) but is actually created based on the individual needs to vastly improve the quality of L&D in ways you can't even imagine yet. AI's ability to aggregate and curate internally and externally-produced content, while relieving L&D admins from menial tasks, brings real smarts to enterprise learning in a way that transforms it from a commodity to your organization's competitive advantage.”

Claudio Erba, CEO, Docebo

A Shift to AI-Powered Admin & Learner Experiences

When most people consider how AI's impact is already being felt in our everyday lives, the go-to response is the suggestion engines that power the content recommendations you see each time you log into Netflix or Amazon.

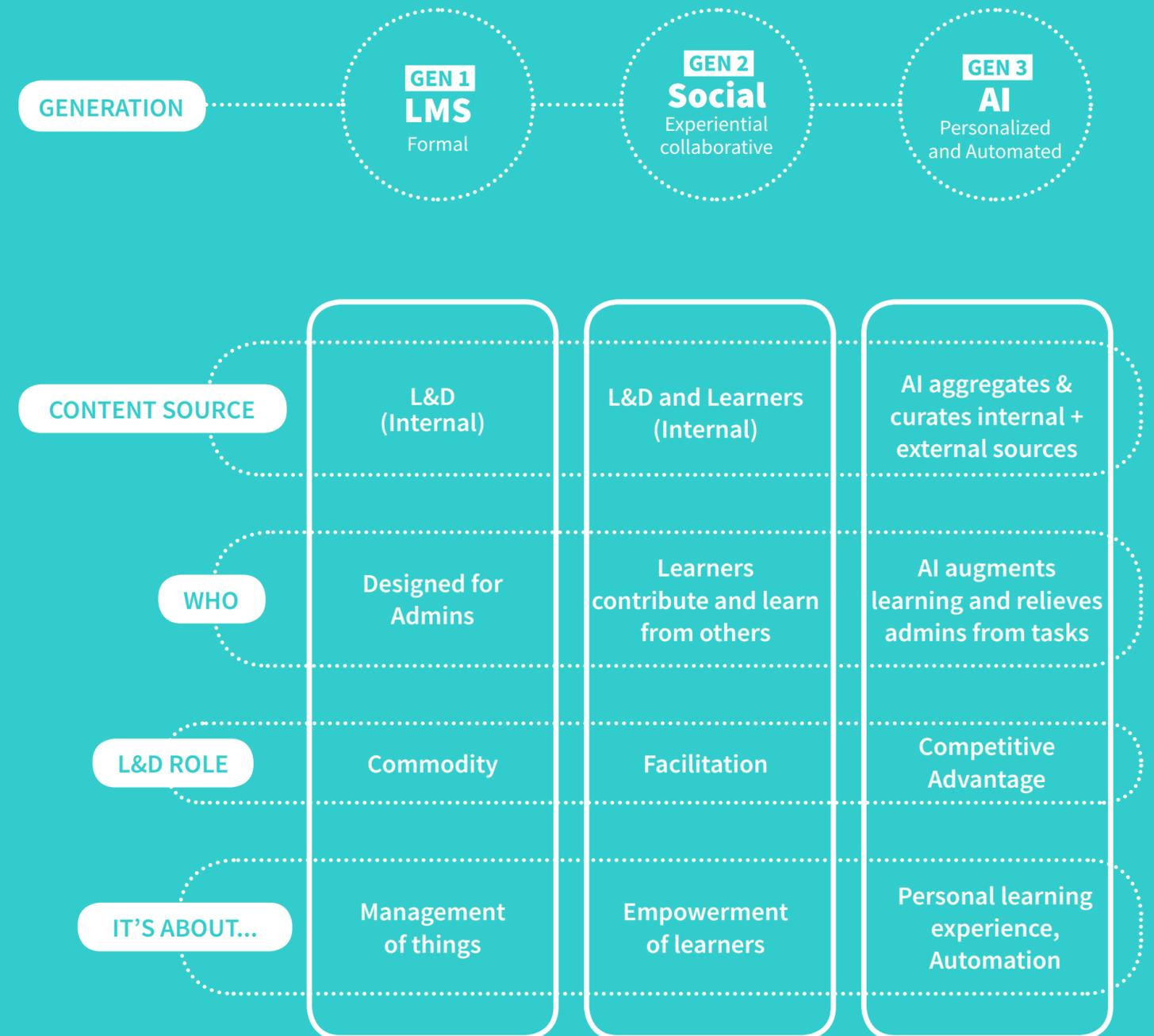
Indeed, AI is the backbone of these suggestion engines, but AI-powered learning is much more than that.

By making AI the engine upon which the whole learning platform lies, L&D has the opportunity to open up new capabilities for admins to develop more immersive and personalized learning experiences, while automating menial tasks.

For learners, AI drives the three E's that are key to achieving better learning experiences: Expedience, Efficiency and Effortlessness.

The effectiveness of AI depends on how much people actually use the system: the more data the system processes, the more AI learns about individual learner needs, turning the learning platform into a continuous improvement engine that grows alongside your learners.

WE'VE ENTERED THE THIRD GENERATION OF L&D



Personalized Learning at Scale

While it might be easy to look at AI and consider it as simply another feature of learning technology designed to make it easier or cheaper, seeing AI for its true potential requires looking at learning through a completely different lens.

That means understanding that each user is different. Personalized content and its presentation, accommodating personal preferences and learning styles for each of your learners (personalization “at scale”) is impossible without AI. Personalized learning involves passing some control over to learners, giving them some input into how they progress through their learning activities.

Taking learning experiences further with AI means expanding the scope of the availability and effectiveness of your learning content, especially as it relates to the availability of flexible learning opportunities via smartphones and tablets and the development of personalized content that reflects individual learner needs.

These functionalities would take personalization to a whole new level because the system essentially takes the wheel to drive the overall effectiveness of an individual learner journey. Machine learning algorithms predict outcomes, allowing you to provide specific content based on a learner’s past performance and individual goals.

For example, online learners that express a particular skills gap receive targeted recommendations that build knowledge related to their skill gap, in a more personalized format. This could include situations where the system would recognize that a learner might be able to actually skip a few modules to take a more comprehensive and less linear learning journey than someone who might lack the basic skills related to that particular topic.

Making Truly Personalized Learning a Reality

- With AI instead of pre-determined pathways, the learner takes more control over the direction of their learning
- AI gathers data to determine a learner’s knowledge of specific skills, then creates a constantly evolving learning pathway for him/her to take
- AI doesn’t just enhance the learning platform but makes it responsive to learner needs by adapting intelligently to their request.

AI-Powered Enterprise Learning is Here

Here are some AI-powered capabilities which are already available:



AUTO-TAGGING

Upon sharing a new learning asset (e.g. a video), AI “listens” to the entire video, understands the keywords, and creates up to 10 tags, which help categorization and search.



AI-POWERED DEEP SEARCH

AI “analyzes” content assets, understands the keywords and produces search results that are immensely more relevant.



INVITE-TO-WATCH

Invite-to-Watch elevates the social learning experience by automatically generating a list of learners who have engaged with similar content, allowing users to easily share content with those who will value it most.

We're Just Scratching The Surface... Here is a Glimpse Into The Future

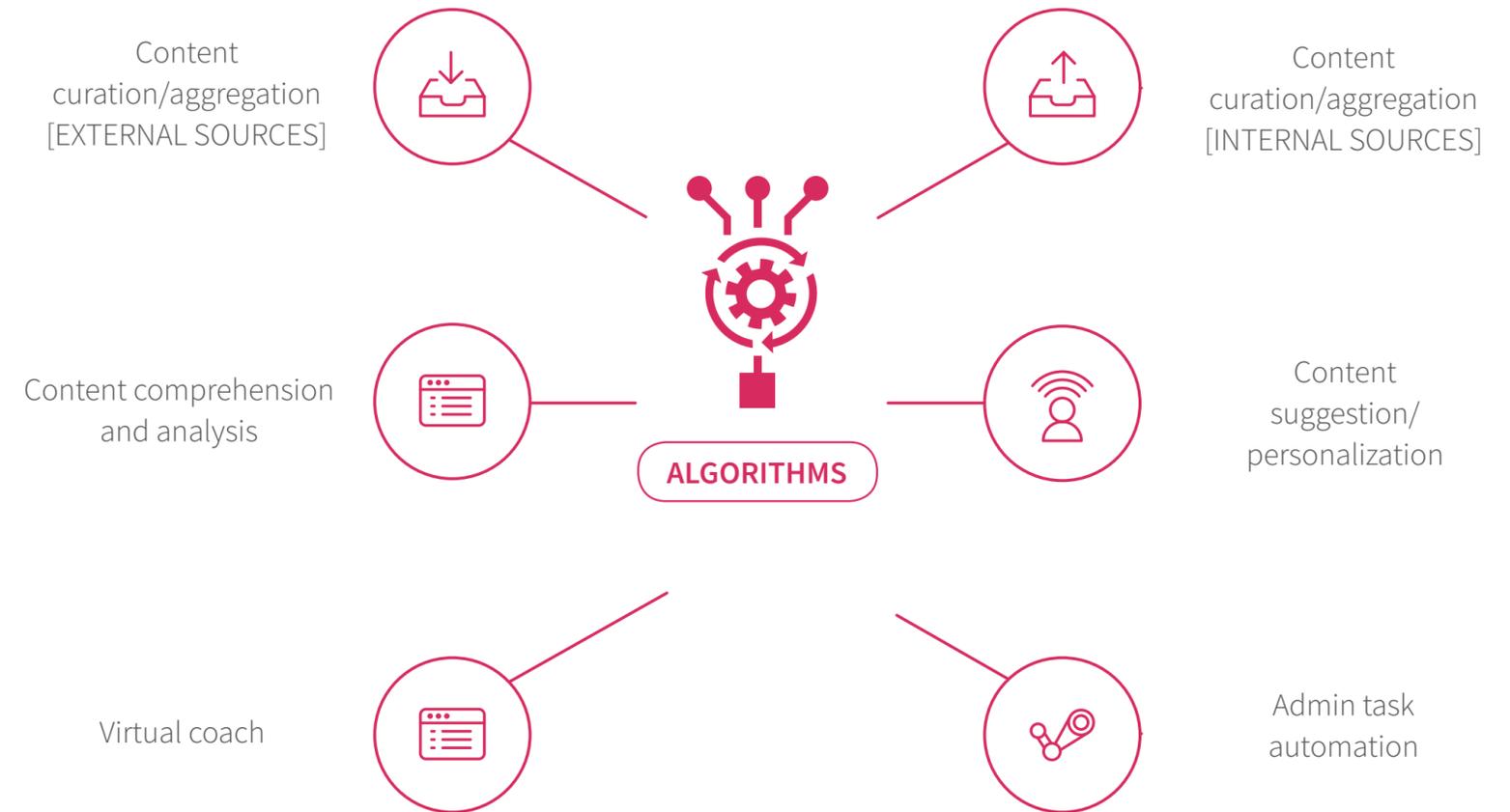
The Next Frontier: Quantum Computing

As artificial intelligence collects data on learners and their behaviour, it is gleaning insights into how learning experiences can be better tailored and more effectively delivered.

Quantum computing creates opportunities to amplify this process by more effectively analyzing and processing data, at speeds and on a scale not possible via traditional computational power. Its purpose in learning is to optimize the learning plan, making it non-linear, more personalized and, ultimately, more effective.

[CLICK HERE TO LEARN MORE ABOUT QUANTUM COMPUTING](#)

AI PILLARS IN E-LEARNING



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ALL IN ON AI: YOUR GUIDE TO ARTIFICIAL INTELLIGENCE IN L&D

The future of enterprise learning is rooted in AI and its truly boundless potential. AI is the key to transforming learning into your organization's new competitive advantage. Download the guide to see how AI can already elevate your learning activities.

[DOWNLOAD THE GUIDE](#)

Conclusion

L&D has become a top priority for organizations as they realize the impact this will have on factors such as employee engagement, productivity and their bottom line. The combination of new employee expectations, the need to adapt skills and a rapidly-changing technology landscape has transformed what is both necessary and possible for learning departments.

E-Learning has become an essential tool and its evolution, spurred by the trends outlined in this report, presents an exciting foundation upon which to build tomorrow's learning initiatives. L&D professionals now play a pivotal role in ensuring organizations and their learners are prepared for a world of work that requires active adaptation, a commitment to lifelong learning and a drive to make learning your competitive advantage.

About Docebo

Docebo is changing the way people learn through artificial intelligence. While traditional enterprise learning technologies have dictated the way people learn with formal courses pushed from the top down, Docebo's learning platform facilitates automated and personalized learning experiences at scale in the flow of work to drive growth, organizational performance and revenue. Docebo is designed to power a cohesive L&D strategy and has been embraced by more than 1,500 companies around the world for its ability to satisfy multiple use cases for both internal and external enterprise learning.

DOCEBO LEARNING PLATFORM



**Docebo
learn**

LMS



**Docebo
Coach & Share**

Social &
Experiential
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Artificial
Intelligence
Engine



**Docebo
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Training

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