

IDC MarketScape: U.S. IT Training 2021 Vendor Assessment

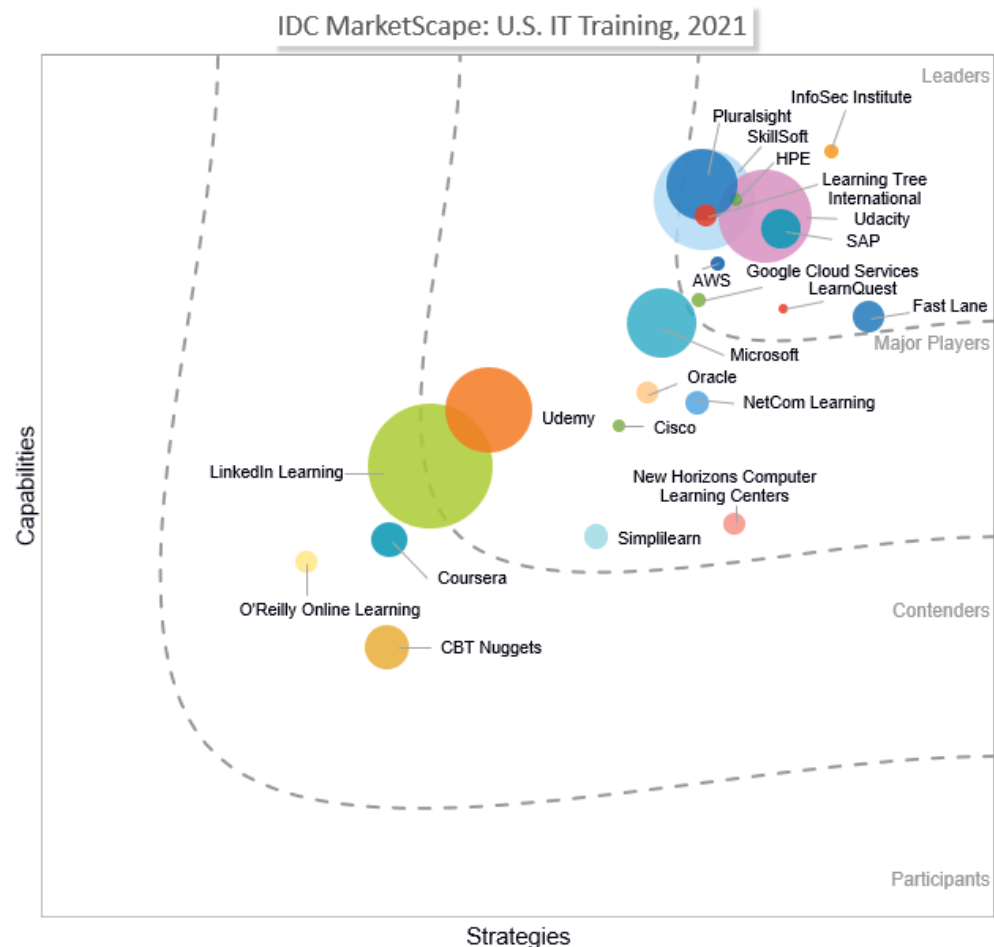
Cushing Anderson

THIS IDC MARKETSCAPE EXCERPT FEATURES SKILLSOFT

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape U.S. IT Training Vendor Assessment



Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: U.S. IT Training 2021 Vendor Assessment (Doc # US47541121). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that are most significant to IT education buyers and how specific training firms perform against those characteristics. This study assesses the capabilities and strategies of many of the most well-known IT training vendors in the United States. This evaluation is based on a framework and set of parameters expected to most impact the success in providing training services during both the short term and the long term. A significant and unique component of this evaluation is the inclusion of IT education buyers' perception of both the key characteristics and capabilities of these training providers. As one would expect of market leaders, overall, these firms performed very well on this assessment. Key findings include the following:

- Instructor quality, the quality and relevance of the material, and the "authority" of the training provider are the most significant characteristics of successful training services.
- Delivery options generally did not have a significant impact on training provider success in this evaluation – with the exception of availability of self-paced elearning, which was considered very important.
- Both breadth of training content and relevance to role are almost equal to training quality in importance – suggesting that while some training buyers are seeking training services from fewer providers, in other cases, organizations are seeking technical depth and expertise.
- Many firms participate in this IT training market, but a few firms seem to stand separate from the others in terms of both capability and training strategy.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

There are dozens, even hundreds, of training providers that can offer training services in this area including specialists and generalists, both large and small. This research includes an analysis of the most well-known IT training firms with portfolios that are appropriate to organizations considering "significant transformation initiatives." Therefore, we included organizations with a wide breadth of offerings and those with a specific technology expertise that is important to transformation initiatives. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size. While some IT training buyers/learners may prefer to select training providers that have broad portfolios spanning multiple technology areas, specialist firms may also be highly valued if their offering, brand, or content is particularly relevant. It is conceivable, and in fact the case, that specialty firms can compete with multidisciplinary firms on an equal footing.

As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular training initiative. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for a training need.

ADVICE FOR TECHNOLOGY BUYERS

Training IT professionals is a challenging activity, as there are time and cost pressures. IT professionals have different skill levels, interest levels, and career aspirations, and they work on different combinations of technology. However, there are several elements of IT training that should dominate the selection criteria for IT education selection:

- **Choose convenience:** Training must be attended or taken by willing (or at least not distracted) students; therefore, training convenience for the team or individual must be a primary consideration. Convenience may imply more instructor-led training (ILT), more self-paced elearning, more onsite or more offsite training, or a particular combination of delivery options. So strongly consider the selection of training based on the preferences, work schedules, and availability of the target learners.
- **Compare the quality of instructors:** For instructor-led programs, either online or classroom based, instructor quality is essential. Request evidence of quality instructors, and understand which instructors are going to teach the specific classes.
- **Evaluate the training content quality:** Training material "authorized" by the technology vendor or third party is often of higher quality and more current than the material developed by other sources. If training on specific technology equipment, seek training provided by authorized training providers. However, some "unauthorized" providers offer exceptional training services, so in addition, consider how the training content is developed and how it is maintained before making a final decision.
- **Evaluate the training content for reference value:** Because of the complexity and breadth of most IT infrastructures, leveraging training material after the training is complete as a reference for routine or exceptional administration is essential. Examine the training and supporting material to assess its value as a reference source for IT professionals while they perform their work.
- **Explore the availability and breadth of labs and simulations:** Labs and simulations are critical training aids. The use of high-quality labs after a course is complete to refresh skills or to experience unfamiliar situations can dramatically increase retention and IT professional competence.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Skillsoft

According to IDC analysis and buyer perception, Skillsoft is positioned in the Leaders category in this 2021 IDC MarketScape for IT training in the United States.

Skillsoft offers a comprehensive suite of premium, original, and authorized partner content in addition to an immersive learning platform and talent development suite. Skillsoft provides cloud-based training courses and software for business and IT professionals. It offers more than 180,000 learning assets, including thousands of courses and tens of thousands of videos on business, compliance, health and safety, and technology. Skillsoft supports organizations in all types of industries such as engineering, education, financial services, government, and hospitality. The firm's Percipio immersive learning

platform manages corporate digital programs while its Skillsoft Dialogue portal helps clients create custom learning sessions.

Customers have access to one of the broadest technology and developer portfolios with nearly 28,000 hours of instruction, including a blend of virtual and on-demand courses, instructor-led training, hands-on labs, and real-world challenges as well as certification prep for more than 170 technical certifications. The technology and developer portfolio includes vendor-authorized content from the world's largest technology companies including AWS, Cisco, Microsoft, and Red Hat as well as expert-authored original content across six key areas: cloud, security, software craft, programming, data, and IT infrastructure.

In June 2021, Churchill Capital acquired Skillsoft and merged with Global Knowledge. The company is based in Nashua, New Hampshire.

Skillsoft's features and solutions include:

- **Curated channels:** Learners choose from 7,000+ courses and 65,000+ pieces of content in hundreds of curated learning paths.
- **Extensive learning model:** Learners have access to on-demand courses, microlearning videos, live-streamed classes, instructor-led virtual classes, tailored private onsite training, scenario-based videos, labs, assessments, online mentoring, and opportunities to practice.
- **Certification prep:** There are classes to prepare for 170 technical certification exams.
- **Personalized experience:** A personalized homepage gives the learner the ability to create playlists, pick up learning where they left off, and receive assignments.
- **Learner-centered design:** The layout allows learners to choose how they want to learn using videos, books, audiobooks, and more.
- **Finding content quickly:** Elasticsearch makes it easier for learners to quickly discover useful information and content that aligns with their interests.
- **Demonstrating the learning impact:** Out-of-the-box reporting using charts and graphs shows how learning activity supports key business objectives.
- **Accelerated learning:** With 24 x 7 access and a mobile app, learning can happen anywhere, anytime, and on any device.
- **Driving engagement:** Motivate and reward learners with Digital Badges.
- **Monitoring progress:** Visual data makes it easy for managers to spot trends and monitor progress.
- **Assignments:** Managers can create flexible learning paths, assign them to users, and monitor progress.
- **New client onboarding:** New clients will work with Skillsoft's team of implementation consultants who will tailor the solution and implementation strategy based on the organization's needs and requirements.
- **Additional services:** Other services include custom development and learning strategy and analysis.

Skillsoft offers training and learning content in leadership development and business skills, compliance, technology, and security. A partial list of training that Skillsoft offers includes:

- **Business:** ASQ (Six Sigma), CompTIA, Human Resource Certification Institute (HRCI), IIBA, ITIL, PRINCE2, and PMI

- **IT professional:** (ISC)², AWS, Cisco, CompTIA, EC-Council, Google Cloud, IBM, International Software Testing Qualification Board (ISTQB), Juniper, Linux Professional Institute (LPI), Microsoft, Oracle, PRINCE2, Red Hat, SAS, ServiceNow, TOGAF, and VMware

Strengths

Its strongest attributes include the following:

- Clients appreciate its reasonable price point.
- Clients appreciate the ease of integration with their LMS.
- Clients appreciate the length of its courses.
- It can help clients customize content or paths.
- It has a strong point of view regarding how much training is helpful.
- It has a strong refresh and update process for its content.
- It has examples of how it improves client operations.
- It integrates labs into a range of its content.
- It offers a range of pricing and packaging approaches.
- Students appreciate its self-paced learning option.

Challenges

To improve its opportunities and market position, it can improve:

- Its IT process training offering
- Its approach to delivering to mobile devices
- Its certification test preparation offering
- Its integration of labs into instruction
- Its v-ILT approach
- Its mentoring services
- Its availability or relevance of additional training services

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in this IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. For this evaluation, we are measuring "student contact hours" as an indication of market share. We asked vendors to estimate the number of students who took a course in the past year multiplied by the average length of the course. For self-paced courses, we also asked them to consider the average time a student spent in an elearning course. The result is a "share of IT education" consumed that each vendor represents.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Priorities of IT Training Buyers' Perception as an Input

A significant and unique component of this evaluation is the inclusion of the perception of IT education buyers on the content and delivery quality of these training providers. This insight is captured in a broad-based random survey and reveals key insights into the capabilities of the individual firms.

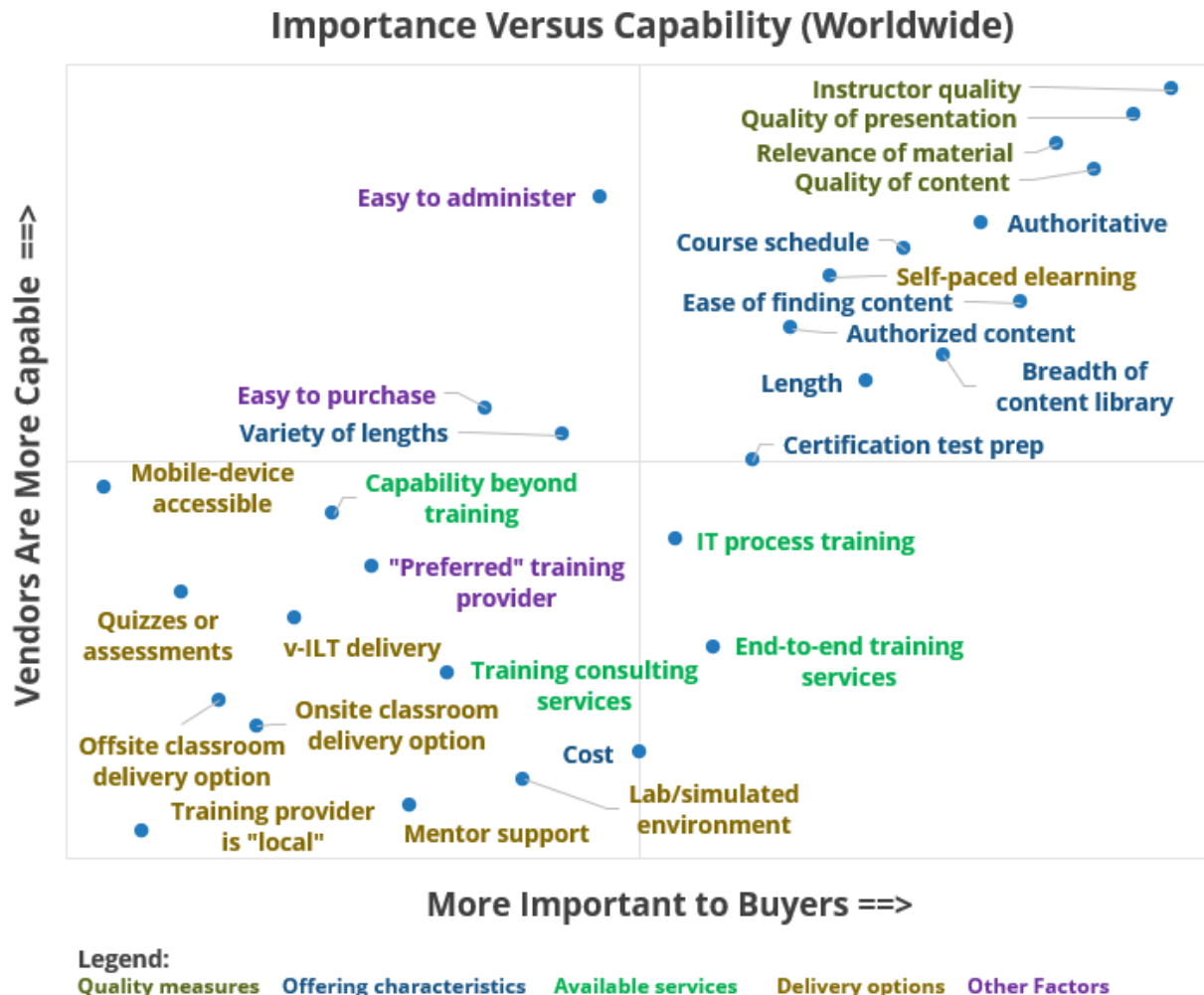
The broad survey also provides key insights into the priorities of IT managers and IT training managers regarding what makes excellent training experiences. We asked IT training buyers to describe the how important a series of training characteristics is to their organization, then asked them to assign a rating from 1 to 5, with 1 being "not a factor" in their selection decision and 5 being a "very significant factor" in their selection decision. Using the mean averages for each driver, we ranked the drivers by relative importance. We also asked IT training buyers about how well each of their training providers performed on each characteristic. When combined, this illustrates both the importance and general performance of IT training providers. The results are shown in Figure 2.

FIGURE 2

IT Training Selection Criteria and Performance

Q. How important are each of the following characteristics of the training provider? (x-axis)

Q. How would you evaluate your training vendor on the following characteristics? (y-axis)



Note: See *How Well Do IT Training Vendors Perform Worldwide?* (IDC #US46605821, July 2021) for more details.

Source: IDC, 2021

Market Definition

Generally, IT training includes the content processes or structures that support employee, client, or supply chain development to meet identified business requirements related to developing, administrating, or using information technology.

The IT training market is predominantly focused on teaching customers (and partners) about products and processes. A well-trained user-base or ecosystem benefits the IT vendors along three dimensions.

First, it helps ensure that learners understand the product's capabilities (and limitations) and that learners and their companies receive the expected benefits from the installed technology. Second, a skilled ecosystem helps to maximize technology utilization so that each customer IT organization can access skilled employees (or can readily train them). The third dimension of IT training is to support technology partner skills during the selection, implementation, and management of a given technology. These three legs can be seen as "enterprise readiness," "market readiness," and "partner readiness" for a technology. While technology adoption can be severely impacted by the degree of market readiness, of most immediate value to technology vendors is a focus on enterprise readiness. At the same time, some activities help a vendor simultaneously support market, partner, and enterprise readiness.

To maximize enterprise readiness to achieve the benefits of systems and technology, an organization's workforce must be well skilled. Deploying, managing, and repairing a technology or solution without sufficient skills reduce the benefits that organizations receive from their technologies. Training vendors have developed training lines of business to provide training services to their clients. These training lines of business have several functions that the vendors leverage to varying degrees:

- Technical deployment education (project team training)
- End-user training
- Certification preparation
- Learning services supporting IT organizational development

Technical Deployment Education

Technical deployment education supports the technical implementation and integration of a product into a technical environment. The audience is typically IT professionals who will deploy or install the technology. This type of training is important before the software is available within an enterprise – and often involves unique technical capabilities that are only important during the deployment phase of a product implementation. From a vendor's perspective, technical education for an individual client has a peak-and-valley profile – where each client either is or is not in a deployment phase. This type of education supports initial enterprise readiness.

End-User Training

End-user training is focused on the use and management of the technology. The audience is typically larger than the deployment training. The audience may be either IT professionals – in the case of infrastructure technologies, IT management software, or application development software – or any other user of applications such as financial management or inventory control software. This type of education is critical at the early stages of a deployment to ensure that the appropriate population is prepared to use the new capabilities or functions that the software enables. This type of training is also important during the ongoing life cycle of the application as new users are exposed to the application because of promotion, hiring, or the expanding use of the application within the enterprise. While ongoing training often occurs at a much lower volume or intensity than rollout training, the audience and the content are often very similar. The timing profile for end-user training is at a high intensity during an organization's deployment and then at a much lower intensity between upgrades, but clients almost never have "zero" training needs. End-user training almost exclusively supports ongoing enterprise readiness, but over sufficient time, trained users represent a market readiness for technology dominance.

Certification Preparation

Certification preparation is most focused on user or technician readiness and attestation to capability. While consultants and partners leverage technical certification training, individual employees are the largest and most dynamic portion of the audience for certification training. Certification training occurs throughout the product life cycle – early in the release and late – depending on type of product and the market demand for skill attestation. Because the largest portion of the audience are individuals, the degree of certification demand and adoption, often measured by the related preparation training, is used by technology vendors to indicate market readiness for a product.

Learning Services

Learning services, supporting IT organizational development, require a more complex relationship between the technology vendor and its clients. These services include a consultative relationship where the technology vendor performs an analysis of the client's IT organization to help determine the optimal staffing and training requirements necessary to effectively deploy and leverage the new technology. This relationship is typically available at the early stages of technical deployment – and may even occur as part of a technical readiness evaluation prior to a system design. Learning services exclusively support enterprise readiness by focusing on a particular organization's ability to absorb and leverage a new technology.

LEARN MORE

Related Research

- *IDC MaturityScape Benchmark: Technology Skills Development Worldwide, 2021* (IDC #US48113421, August 2021)
- *What Skills Matter Overall to IT Professionals in the United States* (IDC #US48132921, August 2021)
- *How Well Do IT Training Vendors Perform Worldwide?* (IDC #US46605821, July 2021)
- *What Skills Matter to Data Management Professionals* (IDC #US47837821, June 2021)
- *What Skills Matter to Cybersecurity Professionals* (IDC #US47837721, June 2021)
- *Worldwide and U.S. IT Education Services Delivery Forecast, 2021-2025* (IDC #US46606221, May 2021)
- *Worldwide and U.S. IT Education Services Forecast, 2021-2025* (IDC #US47677921, May 2021)
- *IDC MaturityScape: Technology Skill Development 2.0* (IDC #US47596821, April 2021)
- *IDC's Worldwide Corporate Education Taxonomy, 2021* (IDC #US47597021, April 2021)

Synopsis

This IDC MarketScape assessment focuses on the market for IT training in the United States. This research includes analysis of the most well-known IT training firms with portfolios that are appropriate to organizations considering "significant transformation initiatives." Therefore, we included organizations with a wide breadth of offering and those with specific technology expertise important to transformation initiatives. This evaluation found that both breadth of training content and relevance to role are almost equal to training quality in importance – suggesting that while some training buyers are seeking training services from fewer providers, in other cases, organizations are seeking technical depth and expertise.

"While training providers are generally perceived as capable, this analysis and the opinion of buyers of training services are clear that several providers provide better, more consistent, and more valuable training services than others." – Cushing Anderson, vice president, IT Education and Certification research

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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