CONQUERING THE CONFUSION

THE ROLE OF THE LMS IN THE EVOLVING LEARNTECH LANDSCAPE

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Conquering the Confusion: The Role of the LMS in the Evolving Learntech Landscape

by Celisa Steele and Jeff Cobb

Learning is one of the constants of human existence. We hunger for learning. We need it, and we always have. But learning always happens in context, and that context has changed profoundly in recent years. That changed—and still changing—context has contributed to the proliferation of learning technology options—and a proliferation of questions. What learntech do you need to power a successful learning business? Where does a learning management system fit? This resource seeks to unpack the context and help you conquer that confusion.

What is a **learning business**?

First, **a learning business exists to generate revenue** through selling learning and education experiences to a target audience.

Second, the **individuals working in the learning business recognize that revenue generation is a fundamental reason for the organization's existence**. That is, they are conscious of and focused on that goal as part of the organization's identity and part of their own identity. This second aspect is important because it distinguishes learning businesses not just by their activities but also by their mindset.

Unpacking the Current Context

In recent decades, four developments have profoundly shaped our understanding of learning and how we can best support it:

1. **Neuroscience and the science of learning**

   Scientists have given us previously inaccessible insight into what happens to the brain as it learns. That insight has helped us identify more effective strategies for learning (spaced learning and effortful retrieval, for example) and less effective strategies (highlighting and re-reading a text). We have also come to understand the importance of social and informal learning and to recognize that they account for more transference of skills and knowledge than formal, structured, expert-led sessions.

   All this has implications for the technologies used to support learning. A system that was designed primarily to deliver formal, developed-by-experts courses with set seat times may not be as adept at supporting informal and social learning.

2. **Shifts in human life and work**

   Humans are living longer and working longer. And we are no longer likely to do the same thing over the course of our now-longer working lives. We change jobs and even careers more frequently, driven in part by technology. Automation and artificial intelligence are replacing jobs or, more commonly, altering responsibilities as we harness technology to help humans.

These shifts have led to the significant growth of the third sector of education that supplements and, in some cases, replaces traditional four-year university degrees whose half-life and cost make them arguably irrelevant. Learning businesses are unbundling education and offering more micro and targeted alternatives, like boot camps and certifications, to help the learners they serve upskill, reskill, and generally succeed in the changing world.

What is the **third sector of education**?

The first sector—the pre-K through high school system that serves our children—and the second sector—higher education that grants degrees to the fortunate among us—are well known. Less familiar but not new, **the third sector of education serves the millions of adults who continue to learn and grow in the decades that follow their secondary and post-secondary education**.

The third sector of education is a patchwork of providers, including **trade and professional associations, academic continuing education, training companies, corporate learning and development, and solo eduprenuers**. Driven by advances in technology, changes in the nature of work, and longer life spans, it is **growing in size and importance**.

3. **Advances in underlying technologies**

   The growth of mobile devices, broader Internet availability, and faster Internet through technologies like 5G means more people have the ability to learn anytime, anywhere.

   Newer modalities (virtual and augmented reality, for example) are likely to become more prevalent as the effects of these advances in underlying technologies settle in. These advances also mean that approaches need to be rethought—learning on a smartphone is different from learning on a desktop. Things that worked well (or at least fine) for longer sessions on a desktop—like a PDF of a textbook—need to be rethought for on-the-go, small-screen, short-burst learning.

4. **Surge in content production**

   The technologies just discussed have brought about a surge in content production. In 2020, YouTube users upload 500 hours of video every minute, according to Visual Capitalist. And that is just one type of content on one platform—the same surge is happening across the Internet.

   The sheer volume of content exacerbates issues around search and trustworthiness. How do learners quickly and easily find the most relevant, reliable content? Learners' needs can range from cut-and-dry, point-of-need questions ("How do I find the median in Excel?") to more involved, mastery-type questions ("How do I conduct effective market research to vet an idea for an online certificate program?"), which adds another layer of difficulty as they search for appropriate resources and answers.

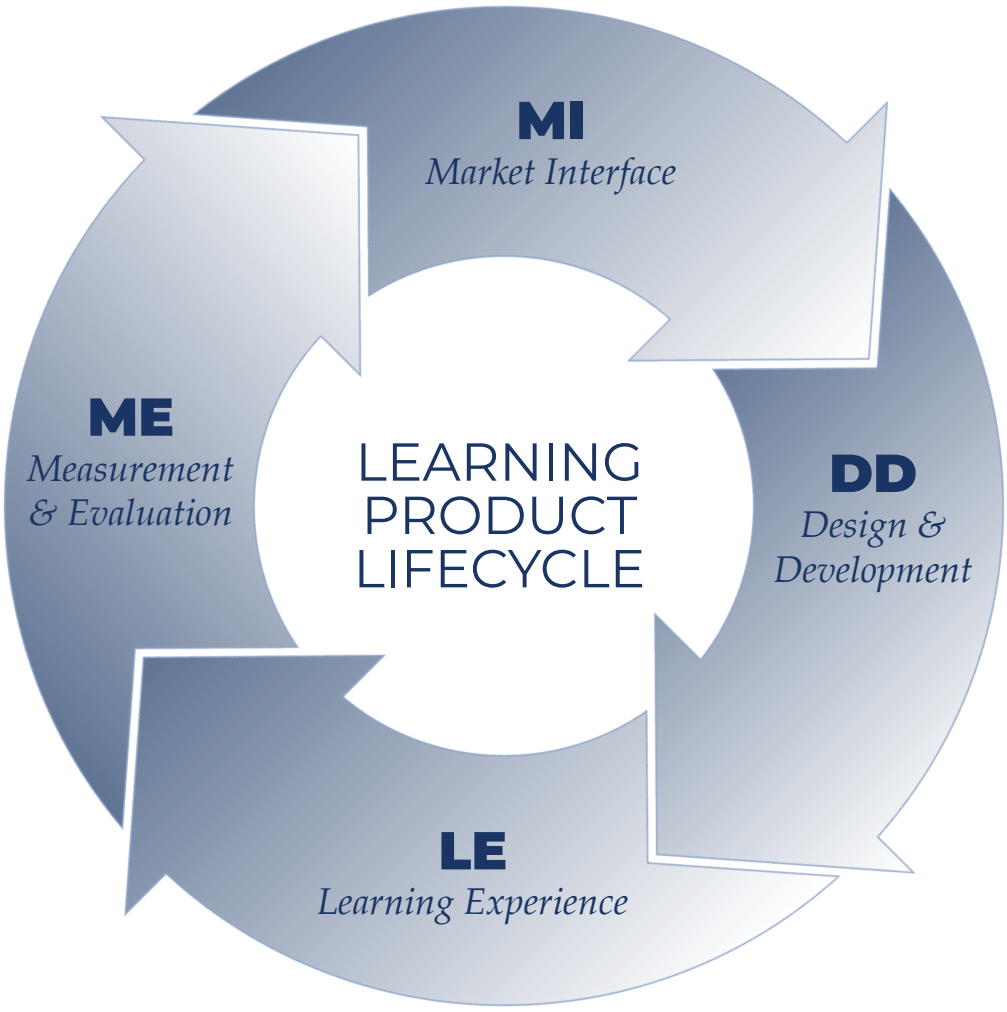
An even more recent development, the COVID-19 pandemic has sharpened the need for many organizations to clarify their learntech needs, pushing them to identify, on a short timeline, technology to support them in their quick pivot to online learning.

On the supplier side, advances in technology mean it has become cheaper, faster, and easier than ever to build and launch a technology platform, and the learntech market has become more attractive as the demand for lifelong learning grows. These developments have led new competitors to enter the market, challenging entrenched vendors. In the learning management system market specifically, this dynamic has led to systems that stretch the boundaries of what LMSes have traditionally been expected to do.

On the buyer side, this means more choices than ever—and more confusion. Whether you are a new buyer or shopping for replacement technology or additional parts of a learning ecosystem, you may be asking, "Which of these options do I really need?"

Understanding Technology's Role in the Learning Product Lifecycle

The MI DD LE ME (pronounced "middle me") learning product lifecycle can offer you insight into which learntech investments make the most sense.



The learning product lifecycle has four phases:

- Market Interface (MI) is about understanding what learners need and want and communicating with them about the value you have to offer.
- Design & Development (DD) is where you create what learners need and want.
- Learning Experience (LE) is where the learners interact with what you have created.
- Measurement & Evaluation (ME) is where you look at the impact of learners interacting with what you have created.

The MI DD LE ME framework is simple, as many useful tools are. The lifecycle both focuses and expands our thinking. Too often we think too much about the end product—the online course, the Webinar, the conference—without thinking through all the phases in this lifecycle and using them to produce the best product possible, the one that will engage our learners, improve their outcomes, and, by doing so, support our learning business's bottom line.

Technology can and usually should play a role in each of these four phases, and the lifecycle can serve as a framework for thinking about what technology you have in place, the purposes it serves, and where additional investment might be most useful. Blurring of lines and degrees of emphasis mean there is rarely a one-to-one match-up. System A is unlikely to cover all your needs in Learning Experience and not touch the other phases. System B probably will not be used solely for Measurement & Evaluation.

Rather, many systems that originated with a tight focus on one phase have expanded their features and functionalities—so a learning management system built exclusively to deliver online courses may now incorporate tools to author content or to foster learning engagement. This broadening of scope for individual systems has created exciting possibilities, but it is also a key source of confusion in the market. Learning businesses are increasingly challenged with determining the extent to which a single system can address all critical components of the lifecycle adequately.

The multiplicity of domains in which a learning business must operate—all the phases of the learning product lifecycle, plus strategy, leadership, and more—coupled with the current context—with its longer lifespans and shorter half-lives for skills and knowledge—means that no single learntech system is likely to do all that a mature learning business needs to do to meaningfully create, manage, and deliver, at scale, effective learning experiences from the range of relevant sources. Despite the widening focus of many systems, it is still rare for a system to touch all four phases of MI DD LE ME equally, much less excel in each.

The Four Learntech Ls: LMS, LCMS, LRS, and LXP

As the learning landscape and market have evolved, the technology platforms most closely associated with learning—including LMSes—have evolved too, and new platforms have emerged. This section will focus on the "core four" learning platform technologies: learning management systems, learning experience platforms, learning record stores, and learning content management systems. Understanding the fundamental purpose and capabilities of each is essential to understanding how the most established of them—the learning management system—fits in your overall learntech ecosystem.

LEARNING MANAGEMENT SYSTEMS

Most learning businesses are familiar with learning management systems, even if they are one of the few not using one. The most common piece of learntech, an LMS is software for delivering educational experiences to learners, with an emphasis on pushing out content designed by the organization that owns the LMS—e.g., your catalog of online courses. Traditionally, learning management systems have excelled at a basic but essential set of tasks for managing learners, providing them with access to learning content, and tracking completion status—often for the purpose of maintaining compliance or awarding credit. Learners interact directly with an LMS via a user interface (UI).

An LMS enables you to enroll learners in courses; it enables your learners to launch and access those courses; and it enables you to track learners' activity, scores, and completion of courses. An LMS provides basic testing and generates reports.

In today's context, most learning businesses are not satisfied with that basic LMS functionality alone—and that demand for more has led to significant expansion of the features and functionalities most modern learning management systems offer. What else an LMS does varies from platform to platform, but learning management systems catering to learning businesses (versus corporate L&D) tend to also emphasize discoverability (empowering learners to find the content they want by searching the catalog, for example) and e-commerce.

LEARNING CONTENT MANAGEMENT SYSTEMS

A learning content management system (LCMS) allows an organization to author and import learning content objects into the platform, edit them, assemble them into learning experiences, and repurpose them into other, different learning experiences. Not as common as LMSes, learning content management systems supplement LMS functionality in the Design & Development phase of the learning product lifecycle. They can be of particular value when collaborative authoring, extensive re-use of individual learning objects, or the ability to manage different versions of learning content are critical to your operations.

Learners do not directly interact with an LCMS—the LCMS UI is for administrators and course authors. Learners interact with the products that come from an LCMS through the UI of another platform, like an LMS or LXP.

While LMSes and LCMSes are distinct types of platforms, some vendors blend the two offerings into a single, unified platform. When that is the case, understanding the origin of the platform can be instructive. Content authoring and management tools built into a system intended primarily for content delivery and tracking will typically be less sophisticated than those featured in an LCMS. The functionality to launch and track learning content and manage learners in a system designed for authoring and assembling content will typically be less robust than in an LMS.

LEARNING RECORD STORES

Learning record stores (LRSes)—servers that receive, store, and provide access to xAPI statements—are newer entrants on the learntech scene. The Experience API (application programming interface), also known as Tin Can and xAPI for

short, is a specification that makes it possible to collect data about a wide range of experiences a learner has, both online and offline.

The appeal of xAPI is that it allows learning businesses and learners greater flexibility in what data is tracked and captured when compared to older standards (like SCORM) and their almost exclusive focus on online courses. xAPI statements, structured as "[actor] [verb] [object]," allow offline activities as well as non-traditional online activities to be recorded. xAPI also opens the door to allowing learners to play a larger role in determining which of their actions get counted as learning activities. Their actions need not be limited to the completion of administrator-created courses but can also include a wide range of less formal activities—for example, watching a how-to video on YouTube, participating in a mentoring or coaching session, or writing a blog post.

Learners typically do not interact directly with an LRS—the LRS is a behind-the-scenes repository of learning records (those "[actor] [verb] [object]" xAPI statements) that might be accessed by learning businesses to better understand their learners' needs, understand their current skills and knowledge, to award credit, and more. Given their behind-the-scenes nature, LRSes are usually used in tandem with other learntech, like an LMS or LXP, and some LMS and LXP providers have built learning record stores into their systems.

LEARNING EXPERIENCE PLATFORMS

The learning experience platform (LXP) is one of the newest flavors of learntech. Focused on overcoming some of the perceived shortcomings of traditional LMSes, LXPs put the learner at the forefront. The learner interacts directly with an LXP via a user interface (UI), and LXPs emphasize the user experience (UX).

Drawing on personalization, discovery, and playlist models now common in non-learning applications such as Netflix and Spotify, LXPs allow learners to explore and then access educational experiences, with an emphasis on learner-discovered content. Whereas LMSes evolved out of a top-down model where the organization and its administrators know best what a learner needs, LXPs empower learners to follow their interests when deciding what learning experiences to engage in.

To allow for meaningful learner-driven decisions, LXPs typically draw on large repositories of content, which often means drawing on catalogs of content from outside the learning business. Additionally, most major LXPs leverage artificial intelligence to recommend content to learners based on behaviors and interests.

A NOTE ON INTEGRATION

Most organizations that have at least one piece of learntech in place understand the importance of integration. For example, the integration of an LMS with the main user database—whether a customer relationship management (CRM) platform, association management system (AMS), or similar system. But what is needed to thrive in the current moment goes beyond simple single sign-on (SSO). While integration is key—and you will want to shop for systems that facilitate integration—before you can integrate, you have to determine which systems should be part of your learntech stack, and, increasingly, this means considering one or more of the L technologies in addition to your user database, online community software, and Webinar platform.

	LMS — *Learning Management System*	**LXP** — *Learning Experience Platform*	**LRS** — *Learning Record Store*	**LCMS** — *Learning Content Management System*
WHAT IT IS	Software for delivering educational experiences to learners, with an emphasis on pushing out content determined by the learning business	Software for allowing learners to discover and then access educational experiences, with an emphasis on learner-discovered content	Server that receives, stores, and provides access to xAPI statements	Software for creating educational experiences and managing their constituent parts
WHAT IT DOES	Delivers self-contained courses to learners either through assignment or user-initiated browsing	Recommends content to learners based on algorithms (Netflix-like personalization) and allows learners to explore and choose among recommendations	Captures a broad range of learning activities initiated by learners, formal and informal, assigned and chosen, including but not limited to online courses	Repurposes bits of content across multiple courses and keeps rapidly changing content up to date
USER INTERFACE	Learners interact directly via UI	Learners interact directly via UI	Learners do not interact directly via UI	Learners do not interact directly via UI
PUSH/PULL	Learning business pushes content	Learners pull content	Learner activities push data	Learning business pushes content
TYPICAL FOCUS IN MI DD LE ME	Learning Experience	Learning Experience	Measurement & Evaluation	Design & Development
TYPICAL FOCUS OF LEARNING CONTENT	Courses created by the learning business	Courses and other content created outside the learning business (or a learning business with a large internal catalog)	Anything from anywhere	Small, reusable chunks created by the learning business

The Evolving Role of the LMS

While it is true there is no single, across-the-board, right answer for which system or systems a learning business needs, it is also true that the LMS will likely remain a part of the core learning business technology stack for years to come.

An LMS on its own serves essential needs that most learning businesses have and are likely to have for the foreseeable future. These include the abilities to manage users, push out education that the learning business can ensure aligns with requirements set by regulatory and credentialing bodies, and validate completion of structured learning experiences in accordance with these requirements or requirements set by the learning business itself.

Given that a rapidly growing number of learning management systems are incorporating options for supporting social learning, gamified learning, and access to external course catalogs, many learning businesses may find that the newer, more modern breed of LMS is sufficient for supporting the essential components of the MI DD LE ME lifecycle. These platforms—particularly to the extent that they incorporate marketing and e-commerce tools—are evolving into what might be described as holistic operating systems for learning businesses.

But even the most comprehensive LMS may not meet *all* of a learning business's strategic needs.

For example, if an organization develops its learning content through a distributed, collaborative process, if it needs strong capabilities for re-using learning objects across different learning experiences (so the same interactive exercise could appear in multiple courses), or if it wants greater confidence that the content it creates can be used across multiple platforms, then it may make sense to use an LMS in combination with an LCMS.

If a learning business sees strategic value in being able to support and track learning experiences that take place outside of the LMS, particularly informal experiences, then using an LRS in tandem with the LMS may be valuable. An xAPI-compliant LMS can push learning data to an LRS which, in turn, can capture data generated from learner activities that happen on the Web, on mobile devices, in classroom settings, or other places. The LRS then becomes a valuable source for reporting beyond what the LMS alone can provide.

While there may be instances in which an LXP can replace an LMS, most LXP vendors currently promote use of an LXP in tandem with an LMS. When it comes to providing a Netflix-like, highly personalized learning experience, LXPs have a clear lead at this point. At the same time, they typically do not have the same capabilities for handling structured content and learning activities that LMSes do. In the current market, a number of LXPs and LMSes have announced partnerships to help provide organizations with the best of both worlds. Over time, our expectation is that LMSes will incorporate more LXP capabilities natively, and vice-versa. In the meantime, though, the LMS remains the starting point for most learning businesses.

Learning As a Constant—and an Essential Part of Learning Businesses

Conquering confusion requires understanding the broader context in which learning happens, the narrower components of the learning product lifecycle, and the ways in which specific types of learning technology can support each. A major motivation behind this resource is conveying the focus and purpose of different types of learntech.

Once you understand their strengths, you can match platforms with the needs of your learning business. Those needs likely derive from the fundamental goals of any successful learning business:

- Reaching the right people with the right products
- Creating effective, efficient, engaging products that contribute to your bottom line
- Ensuring impact for your learners and other stakeholders—their employers, those they serve in their professions and careers, even society at large

Learning is a constant of existence, and learning businesses play an essential part in serving the human drive to learn. When equipped with learntech that supports your needs, you are positioned to be the go-to source for learning in your market.

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Adapt or Die: Why Digital Transformation Cannot Be Ignored

by Ashish Rangnekar, CEO, BenchPrep

Today the professional learning space is going through a strategic inflection point. The core fundamentals are changing. Technology is the key driving force changing learner behavior, competition, pricing, and business models. Technology has changed the way we work, live, and learn. These changes were well underway, and COVID-19 has further accelerated this transition by at least 10 years.

Through artificial intelligence, automation, and digitization, some jobs will be lost, some jobs will be created, and all jobs will change. There is a mandate for continuous reskilling and upskilling beyond the four-year degree through certifications, training programs, and more. Lifelong and unbundled learning has become an absolute economic reality. As organizations embrace new technologies, the jobs of the future will require very different and more specialized skill sets, the kind of skill sets that require constant upskilling.

These changes and the ensuing inflection point can mean an opportunity to rise to new heights. And it may just as likely signal the beginning of the end. There will be winners and losers. Winners will embrace the change and commit to digital transformation. Losers will resist the change and justify the old reality. Every organization has a choice.

Learning organizations that have embraced the 10X digital transformation are winning. And a 10X digital transformation goes way beyond the digitization of learning programs and requires a mindset shift in the way you approach your entire business. This is not about incremental change. This is a systemic shift towards digital.

There is one important consideration as you begin this digital transformation journey: how to build the right technology stack to enable this transition.

With over 4,000 learning technologies on the market, it can be difficult (and overwhelming!) to know what technology is the best fit for your needs. And it's important to keep in mind that not all learning technologies are equal, especially when it comes to how they help you do your job.

Organizations will need to consider what their top priorities are when it comes to integrating a learning technology into their tech stack because different types of learning technologies will prioritize different needs. In BenchPrep's 2020 High-Stakes Learning Market Trends report, survey respondents reported learner-centric activities as their top priorities in their learning platform—making courses more engaging (50 percent), improving platform ease of use (49 percent), and improving learner reporting (45 percent). Generating revenue is also a top priority as 48 percent said they want to increase the number of courses they offered.

To set yourself up for long-term success, you can no longer be resistant to the digital transformation of your learning programs. Learning technology will transform your learning content into powerful, impactful, and gamified experiences that your learners will be excited to engage with. It can help you continually engage your learners to ensure they're retaining the information they absorbed from your program. Learning technology can also provide you with the data analytics you need to make informed business decisions about the efficacy of your learning program. Lean into technology to help you achieve business goals and ensure the success of your learners.

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In each episode, we offer actionable insights based on our extensive experience working with and in learning businesses and on conversations with a wide range of experts and organizational leaders.

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About Leading Learning *publisher of this executive briefing*

Leading Learning (www.leadinglearning.com) provides a range of resources to help learning business professionals excel in the global market for lifelong learning, continuing education, and professional development.

Leading Learning resources include a podcast, Webinars, an e-newsletter, publications such as this executive briefing, and more. The goals for Leading Learning are to do the following:

- Raise awareness of the third sector of education and the critical role that learning businesses play in it.
- Help learning businesses increases the reach, revenue, and impact of their offerings.
- Support individual learning professionals in achieving high levels of performance in their work.

An initiative of Tagoras (www.tagoras.com), Leading Learning was co-founded by Jeff Cobb and Celisa Steele, who have each been working in the business of lifelong learning for more than 20 years. They have worked for multiple learning technology companies and have built and sold a learning technology and online course production company of their own. For more than a decade (through Tagoras), they have consulted with a wide range of learning businesses to help them improve their performance. Last, but certainly not least, they are in the learning business themselves. ◗◖

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