



Something is Going on Down there in the LMS Market

Craig Weiss | November 6, 2010 at 5:07 am | Tags: ASTD, clo, e-learning, elearning, LMS, mlearning, mobile learning, talent management | Categories: E-Learn Info, HTML5, LCMS, LMS, SCORM, Talent and Performance Management, Trends, Uncategorized, e-learning, e-learning vendors, elearning, learning portal, mobile learning, tablet, tablets, webinars | URL: <http://wp.me/pvn5p-ix>

In the movie *Enron: The Smartest Guys in the Room*, one of the opening shots shows the skyline of Houston from above. As the camera goes over the buildings, a series of voices say, "something is going on down there", well in the LMS world; something is going on down there..

Get your tablets here.. your tablets..

Latest data:

- 95% of the tablet market is owned by iPad
- 35 tablets will hit the market starting in early Q4 to late Q1 2011
- Samsung Galaxy S is expected to be the first real challenger to the iPad, it runs on Android OS, offers Flash 10.1 and HTML5. launches on Verizon on November 11th, has features including camera, web cam, etc.
- HP Slate already is in the market, runs on Windows7, but targets the business market
- There are over 30 tablets already in the market, besides the iPad, including some that run on the Android OS
- Gartner is calling tablets - "media tablets"
- The tablets actual name is "consumer slate tablets", but most people are just calling them "tablets"
- Gartner projects 54.8 million tablets to be sold by the end of 2011 & over 208 million units in 2014

LMS Vendors and Tablets Update

The latest projected number of just iPads to be sold by the end of 2010 is 19 million units. This does not include the other tablets already out in the market, nor the Galaxy. Again, the iPad runs only with HTML5, not Flash 10.1. True, the other tablets and Samsung offer Flash 10.1, but they offer HTML5 too.

That said, why is this happening:

- A significant (over 90%) of vendors are holding off this year and at least part of next year from optimizing their solution to the iPad
- Over 98% do not have a true HTML5 player in their system that can run a 100% pure HTML5 course - which by the way, has nothing to do with the browser agnostic pitch they make about their system being optimized for the iPad
- None of have stated that their system works on any other tablet, again, it may be browser agnostic, but with 30+ in the space and more coming, time to jump off the bench and verify that it looks sharp and slick on other tablets - start with the Galaxy

Browser Agnostic

When you hear the term "browser agnostic", what this means is that the product or solution will work on any browser. But with LMS vendors jumping into the mobile learning sector, at least in some cases, it may be a tad misleading.

You have no idea on what browsers they tested their solution to make that claim. I'm sure they tested with IE, Firefox, Safari and Chrome, but what about Opera? Dolphin HD? Or the beta versions of the browsers yet to be launched.

Let me back up, on the Opera and Dolphin HD part. Opera is a browser which you can download and use on your desktop, laptop, etc., but it is extremely popular, with some reports saying #1 most used browser for smartphones. Dolphin HD is a browser that is extremely popular on the Android smartphones. My question to vendors who pitch browser agnostic is simple: did you test and verify that your LMS (if you stated it as a mobile LMS) will work with these two specific browsers?

Beta, Beta, Beta.. Swing!

The bandwagon rage are LMS vendors stating that their product/solution is optimized for tablets, specifically mentioning the iPad. Great. Again, they tie back into the browser agnostic.

Here though is the challenge. What about the other tablets? What browsers did they test on, because the current browsers available and the beta and new versions being released - are different in a few ways, especially when it comes to HTML5. We know that if the browser supports Flash 10.1, then it is not an issue, and both the current and betas do support Flash. However, the notable browser versions currently on the market, sans Safari and Opera (which already have the latest enhanced support and stronger capabilities for HTML5), have limited HTML5 capabilities.

Example: if you use IE8, which you may be using now - you will experience the HTML5 experience (and thus can view sites that have HTML5), but the new version IE9 will far surpass that, by maximizing out the capabilities and robustness HTML5 features, same in point for the other browsers.

Thus in the Beta World: Tested and Verified with?

- Firefox 4.0? Because, I tested it out and with its brand new interface, which is different than past versions, and the number of bugs I saw, I wouldn't exactly be using it on an every day basis at this point.
- IE9? Solid, but again its a beta.
- Chrome 8.05 beta works well, but the next version they skipped and they just launched early this week - Chrome 9.0 beta (I just started to use it). Based on the fact, it just launched this week, I'm going to guess you haven't tested it.

Oh, the iPad. Yeah, I bet you didn't know that not everyone uses Safari as the browser.

Many people use Atomic Browser. So can you say without a doubt, that your statement of your LMS being optimized 100% on the iPad, exists when people are using Atomic browser or another alternative browser on the iPad and not Safari? Or are you unsure? Let me know. Otherwise, I and everyone else will assume, your system is browser agnostic for the iPad, which means it will work regardless of the browser.

Acquire, Assimilate

Ahh two wonderful words, unless you happen to be the other company on the other end, about to be purchased or assimilated into your new BFF's product.

What is different this time around, then in past years, are the buyers are not from the LMS space. They are from other markets, but are entering and purchasing, and yes in some cases assimilating. Let's take a brief look at a couple of recent moves:

- Taleo acquires Learn.com
- Salesforce.com reportedly close to acquiring DimDim (web conferencing solution)

While I cannot say who they are, there are a couple LMS vendors that are ripe for acquisition, and it wouldn't be a shock to see them in new hands by Q2 2011.

Talent Management Systems

As mentioned a few months back, this is a continued growth market with lots of revenue growth. So, what does that mean? Well, besides the players who already are what I deem pure TM vendors, a couple of new kids are entering the space (or already are in the space) to compete.

Let's meet the teams:

- 100% Pure Talent Management Systems - this is what they do, they may offer a tiny bit of L&D, but it is tiny..some do not offer it
- LMS vendors with TM modules - they are still in the LMS space, but they are splitting into two - with LMS one side, the other side driven by TM or as some like to pitch it "Performance Management or Knowledge Management"
- LMS vendors who left the LMS space to focus only on TM

For the LMS vendors with the split angle, I recall one vendor (who shall remain nameless) telling me that 60+% of their end users were using their LMS, but the rest were using the Talent Management features.

Another vendor (again, nameless) told me that although externally they were a LMS, internally (after I repeatedly asked them) were aiming more towards the TM market. Nothing wrong with either of those strategies, mind you. After all, there is money in those hills! Or workplaces.

Workday

Have you ever heard of them? If you are in the TM market, you should. They are an ERP system founded by the guy who started Peoplesoft and then eventually sold it to Oracle. Well, he is back. Workday is gaining traction. If I am a TM solution or I am focusing on offering TM/PM capabilities and want to stress the integration to ERP solutions, I am going to want to make sure I include Workday.

LMS/LCMS/CMS Vendors

Even if you are not in the TM market, but you pitch that your system integrates well with ERP systems, such as SAP, Oracle and Peoplesoft, I would want to start having meetings internally on Workday. Traction means something, and the fact it is happening in a slow economy, should be screaming to you, that a move is afoot.

Pay for the Privilege

One of the most irritating things I see in the market, is when a feature or service that is commonly free turns into a fee based. Especially, when it can mislead end users, who maybe unaware that the feature or service is not needed.

When a Course Authoring Tool Built-In is not a Free a Built-In

I have seen this with a couple of vendors and thought to myself, are they kidding me? Thankfully they were lousy LMSs, so it never really irked me. That said, I have to say I was in shock when I found out that Topyx LMS by Interactyx is offering their built in course authoring tool as a FEE based solution and not free.

Here is how the offer works

- You receive 30 days free to use the course authoring tool - again it is built into the system
- If you choose to use it, after the trial, it will cost you \$1,000 for unlimited number of courses and unlimited number of authors or developers

So, for a one time fee of 1K, you can build your own courses using their content authoring tool that exists in their system. Again, you do not have to use their tool, it is completely optional, but if you want to, there is a fee to it.

Confusion to End Users

- Because the course authoring tool is built into the system, the only way to build your own courses, is to use their course authoring tool

This is FALSE. You do not. You can purchase any 3rd party course authoring tool product or use a free course authoring tool product to create your courses and upload them into the Topyx LMS, as long as it is SCORM compliant. Topyx is SCORM 2004, which means that a tool that is SCORM 2004, SCORM 1.2, SCORM 2000 will work.

After building your course, you will select (based on your 3rd party product) how you would want to output it - SCORM wrapper, etc. - then you can move/upload it into the LMS.

- Pricing is lower for the built-in course authoring tool than purchasing a 3rd party

DEPENDS on whose product you purchase. Look around. Use my content authoring tool directory, which lists over a hundred vendors, their products and includes price points. It identifies those who offer trials and provides additional information. If you want to use a freebie, my blog contains an article on free course authoring tools - the most widely used one is courselab.

I hope that Interactyx re-thinks this strategy. It is one of my top ten LMS vendors in the small dog category, but this decision is taking them two steps backward, not forward.

Is the LMS Dead?

On November 18th from 11 a.m. to 12 p.m., a panel consisting of

- Craig Weiss, Analyst and Author of E-Learning 24/7 blog (me)
- Richard Nantel, CEO, Brandon Hall Research
- David Wilson, Founder and Managing Director, Elearnity
- Charles Jennings, Managing Director, Duntroon Associates
- And Jay Shaw, CEO, Net Dimensions

will be discussing online the role of social media and mobile technology in corporate training, commenting on the growing focus on performance support and highlighting new areas of LMS applications beyond employee training and development

This webinar is 100% free. To Learn more and register for this one time online amazing event, please click [I'M Intrigued](#)

HTML5 Course, Player and iPad

Next week, I will be presenting my topic on HTML5, Tablets & E-Learning at BYOL in NYC. As part of my presentation, I will be showing a course built in 100% HTML5, courtesy of ej4, a custom courseware shop out of Kansas City. The course will be viewed in a LMS that uses a HTML5 player, so that you actually launch pure HTML5 courses.

In a couple of weeks, I will be posting the course online for you to view. I will provide information on it, and for those who do not have a tablet, explain how you will be able to view via a browser and which browser I recommend that you use, to see its capabilities.

Surf Expedition the Net Way

On a surf expedition the other week, I came across a LMS vendor who was not pitching their product or selling their service, but rather was providing unbiased information on tablets and how they will revolutionize e-learning. It is a video. Click to [WATCH NOW](#).

Next Week

As aforementioned, I will be away next week speaking at a conference and as such will not be putting up a new blog post. I will however be tweeting. My next new blog post will appear on November 17th, 2010.

E-Learning 24/7