

HR Technology & Services

The Future of Learning Services: Prioritizing the Skills Gap for the New Era of Work

Report Abstract

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Who is This Market Analysis For?

NelsonHall's Learning Services report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the Learning Services market
- Vendor marketing, sales, and business managers developing strategies to target Learning Services
- Financial analysts and investors specializing in the Learning Services sector.

Key Findings & Highlights

Skills and broader talent shortages, alongside unpredictable, ever-changing external market forces, will be the dominant challenges organizations and Learning Services vendors will face for the foreseeable future.

Learning is vital to organizations' future success in attracting, developing, and retaining talent, and is critical for long-term business survival. More organizations of all sizes lack the internal know-how to become or remain future-fit, and many do not have basic, essential visibility of their workforce's current skills to help them move forward.

Learning Services vendors offer sophisticated services covering learning content, administration, delivery, technology, and consultancy, which have evolved in step with the maturity of their clients' learning functions. These have developed to give more forward-thinking organizations a competitive edge. But gaps in that provision, notably helping businesses embrace a skills-first model, learning around specific skills clusters, and services aimed at SMBs, are becoming glaringly apparent as the complexity of challenges intensifies for all sizes of organization. Learning and skilling must focus on all skills required by client organizations for the future of work regardless of employee seniority or career stage, and significant consultancy support must be given to get the basics of skilling in place so organizations can build on those foundations and plug their gaps in knowledge. Alongside, vendors must keep pace with the rapid evolution of technology via expert internal teams or partnerships to prove their ROI worth, while investing in generative AI, which is likely to be revolutionary in its potential usage for Learning Services in years to come, based on successful use cases undertaken in 2023.

Leading vendors, while providing sophisticated learning services and tech, are also offering new solutions to plug those glaring gaps in market provision, and are reaping the rewards for doing so. Market awareness, deep client understanding, operational agility, flexibility, and adaptability are vital for Learning Service vendor success in a VUCA world.

Scope of the Report

The report analyzes the worldwide market for Learning Services and addresses the following questions:

- What is the market size and projected growth for the Learning Services market by geography?
- What is the profile of activity in the global Learning Services market by industry sector?
- What are the top drivers for the adoption of Learning Services?
- What are the benefits currently achieved by users of Learning Services?
- What factors are inhibiting user adoption of Learning Services?
- Who are the leading Learning Services vendors globally and by geography?
- What combination of services is typically provided within Learning Services contracts, and what new services are being added?
- What is the current pattern of delivery location used for Learning Services, and how is this changing?
- What are the challenges and success factors within Learning Services?

Learning Services Vendor Assessments Available for:

Capgemini

GP Strategies

IBM

Infopro Learning

Infosys

NIIT MTS

Ozemio

Seertech Solutions

Tesseract Learning

Vertex Professional Services (VPS).

About The Author

Nikki is a Principal Research Analyst at NelsonHall, with shared responsibility for HRO research globally. Managed Service Program (MSP)/Contingent Workforce Services (CWS), Learning Platforms, and Learning Services. Nikki has a wealth of operational experience across the entire HR function, including talent acquisition, talent development, employee engagement, employee relations, compensation, benefits, payroll, employment law, and HR systems. She also has significant experience in leading and managing business transformation/integration and cultural change projects, including outsourcing key business functions, accelerated growth via TUPE transfers, organization and process redesign, and M&A initiatives (including due diligence, rebranding, cultural realignment, and compensation and benefits changes).



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About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the ‘art of the possible’ in digital operations transformation. With analysts in the U.S., U.K., and Continental Europe, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. And for vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall’s research is based on rigorous, primary research, and is widely respected for the quality, depth and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com

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