Why Read This Report

In our 34-criteria evaluation of learning and performance management providers, we identified the nine most significant ones — Cornerstone OnDemand, Halogen Software, Haufe, PageUp, PeopleFluent, Saba Software, SAP SuccessFactors, SumTotal, Talentsoft — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals make the right choice.

Key Takeaways

**SAP SuccessFactors, Cornerstone OnDemand, And Saba Software Lead The Pack**

Forrester’s research uncovered a market in which SAP SuccessFactors, Cornerstone OnDemand, and Saba Software lead the pack. SumTotal, PageUp, PeopleFluent, Talentsoft, and Halogen Software offer competitive options. Haufe lags behind.

**Stakeholders Want Employees With Knowledge And Skills To Satisfy Customers**

The learning and performance management market is growing because HR and business stakeholders see these solutions as critical to the development of employee skills, knowledge, and performance. Employees with these attributes are most successful in supporting and satisfying customers.

**More Personalized Learning And Continual Performance Support Are Key Differentiators**

As legacy technology becomes outdated and less effective, improved features focus on ease-of-use, shorter content learning chunks, goals that are aligned with company strategy, and continual performance support, and they dictate which providers will lead the pack. SAP SuccessFactors, Cornerstone OnDemand, and Saba Software have focused on meeting these needs.
The Forrester Wave™: Learning And Performance Management, Q4 2016

The Nine Providers That Matter Most And How They Stack Up

by Claire Schooley
with Christopher Andrews, Joseph Miller, and Ian McPherson
December 2, 2016

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Forrester conducted product evaluations in Q3, 2016 and interviewed nine vendor and 18 user companies, including: Cornerstone OnDemand, Halogen Software, Haufe, PageUp, PeopleFluent, Saba Software, SAP SuccessFactors, SumTotal, and Talentsoft.

Related Research Documents

The Forrester Wave™: Learning And Talent Development, Q1 2013
Transform Employee Performance For Continuous Engagement
Updating Learning For The Next-Generation Workforce
Vendor Landscape: Standalone Learning Management System Vendors
Employee Learning And Performance Drive Customer Excellence

The age of the customer represents a fundamental transition of power away from institutions and organizations toward customers — who now have the information, tools, and systems that they need to get what they want, when, where, and how they want it. In this environment, every business you work with will need to compete on customer experience (CX). In fact, 76% of global execs tell us that improving CX is a high or critical priority.¹

But who will deliver that great customer experience? In many cases, it will indeed be a technology interaction, driven by a mobile moment, or a social technology interaction. But the way your customers interact with employees is still an important driver of customer satisfaction and loyalty.² In fact, Forrester has identified the ability to groom the right talent as one of the six most critical levers of customer-obsessed organizations.³ In Forrester’s experience, this success comes from employees who are well trained, who are engaged, and who receive ongoing coaching and support from managers.

Learning and performance management software applications help businesses ensure that their employees receive the learning and performance support they need. They help produce three primary benefits for customer-obsessed organizations:

› **An always-learning culture.** An organization that doesn’t learn is bound to stagnate — an unacceptable outcome that will lead to the slow decline of companies operating in an age of digital disruption. Whether through formal or informal learning, technology tools provide the conduit for learning and peer-to-peer collaboration to happen continuously and throughout the organization.

› **A continuous feedback process.** Continuous feedback and coaching are increasingly standard parts of effective learning organizations. One-on-one feedback tools provide the foundation for great performance and coaching conversations.

› **An integrated approach to talent management.** Outcome-based performance goals supported by learning technologies help to fill employee knowledge and skill gaps and provide the foundation for employee activities. If you want a high-performing, customer-obsessed employee base, you must support and reinforce your standards in learning and performance development.

**Expectations For Learning And Performance Features Are Changing**

Learning and performance tools used to be primarily viewed through the lens of training and compliance. Companies knew they needed to offer some basic coursework to get employees familiar with their job responsibilities and, in many cases, had to provide learning opportunities to stay compliant with industry regulations.

Today, we see the best companies offering learning experiences that go well beyond compliance training, and instead offer a blend of engaging formats that challenge and extend employees’ depth and breadth of knowledge. They achieve this by integrating learning and performance management
more seamlessly into the employee experience. As a result, employee performance has become a continuous process with frequent formal and informal check-ins, which requires continuous interaction and follow-up learning.

As a result of these changes, this Forrester Wave™ includes many new criteria when compared with our last major evaluation of these tools. The new elements of an updated integrated learning and performance offering include:

- **Next-generation learning and performance components.** Learning and performance management tools increasingly exhibit a consumer-like, easy-to-use interface with strong search capabilities. They include social learning interactions; personalization of learning content; content provided in short, single-concept bites of learning called microlearning video; user-generated learning content; and peer-to-peer interaction around learning and performance. In addition, performance tools center on continual formal and informal feedback from managers, manager coaching, career planning, and OKRs (objectives and key results) or other forms of expected and measurable outcomes from goal setting.

- **Many enhanced traditional components.** Many traditional learning and performance management capabilities are still important today. They include the ability to set job competencies, determine team and individual goals, provide learning courses, measure success, and conduct annual or semi-annual employee performance reviews. In addition, companies want the ability to search learning offerings to find just-in-time learning. Other traditional features include the ability to register for a course, track processes, and see recorded results of a classroom, online learning, or blended learning experiences.

### Learning And Performance Management Evaluation Overview

To assess the state of the learning and performance management market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top learning and performance management vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 34 criteria, which we grouped into three high-level buckets:

- **Current offering.** Our evaluation of current capabilities focused on functional capabilities in two core areas: learning content and delivery; and competencies, goals, and performance. We also placed significant emphasis on customer retention, reporting and analytics, and technology.

- **Strategy.** We evaluated each vendor’s go-to-market strategy in terms of overall vision, planned enhancements, and market approach. Our strategy assessment also considered the product’s overall strategy and vision, planned enhancements, market approach, technology strategy, and commercial model in terms of cost and value.
› **Market presence.** The market presence criteria, which determine the size of the symbol on the Forrester Wave graphic but have no weight in terms of overall scoring, include revenue, revenue growth, installed base, delivery, and total employees.

### Evaluated Vendors And Inclusion Criteria

Forrester included nine vendors in the assessment: Cornerstone OnDemand, Halogen Software, Haufe, PageUp, PeopleFluent, Saba Software, SAP SuccessFactors, SumTotal, and Talentsoft. Others, like Oracle, did not meet the Forrester Wave criteria, and Workday’s and Ultimate’s learning and performance products are not sold separately. Vendors in this Forrester Wave feature (see Figure 1):

› **A vendor-owned SaaS offering for both performance and learning.** The components of the learning and performance management solutions under evaluation must be available as a multitenant software-as-a-service (SaaS) solution on a subscription basis. Vendors with exclusively licensed, on-premises deployment models were excluded from this evaluation.

› **A combined performance and learning offering.** All of the vendors provide a performance application and a learning management system application with at least 40 customers that have implemented and are actively using both applications as an integrated offering.

› **$30 million or more in revenue.** All of the vendors in this evaluation had revenues of more than $30 million in their most recent calendar or fiscal year prior to August 17, 2016.

› **A focus on enterprise customers.** The vendors in this evaluation must have a solution that scales for enterprise use, with some live enterprise customers (10,000 or more users) engaged in performance and learning.

› **Recognition by Forrester clients as well as learning and talent development users.** The vendors included here are often discussed in client inquiries and are on clients’ vendor shortlists.
TABLE 1 Evaluated Vendors: Product Information And Selection Criteria

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product evaluated</th>
<th>Product version evaluated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornerstone OnDemand</td>
<td>Cornerstone Learning Cornerstone Performance</td>
<td>*</td>
</tr>
<tr>
<td>Cornerstone OnDemand</td>
<td>Cornerstone Performance</td>
<td>*</td>
</tr>
<tr>
<td>Halogen Software</td>
<td>Halogen Learning</td>
<td>Halogen TalentSpace Suite v16.1</td>
</tr>
<tr>
<td>Halogen Software</td>
<td>Halogen Aspire</td>
<td>Halogen TalentSpace Suite v16.1</td>
</tr>
<tr>
<td>Haufe</td>
<td>Training and Development Goal setting and appraisals</td>
<td>2016 (19.2.12.0) 2016 (19.2.12.0)</td>
</tr>
<tr>
<td>PageUp</td>
<td>Learning</td>
<td>*</td>
</tr>
<tr>
<td>PageUp</td>
<td>Performance</td>
<td>*</td>
</tr>
<tr>
<td>PeopleFluent</td>
<td>PeopleFluent Learning PeopleFluent Performance</td>
<td>v11.11</td>
</tr>
<tr>
<td>PeopleFluent</td>
<td>v11.11</td>
<td>v11.11</td>
</tr>
<tr>
<td>Saba Software</td>
<td>Saba Cloud/Saba Learning Saba Cloud/Saba Performance</td>
<td>Summer Release 2016</td>
</tr>
<tr>
<td>Saba Software</td>
<td>Saba Cloud/Saba Performance</td>
<td>Summer Release 2016</td>
</tr>
<tr>
<td>SumTotal</td>
<td>SumTotal Learn SumTotal Talent</td>
<td>Winter 2016</td>
</tr>
<tr>
<td>SumTotal</td>
<td>Winter 2016</td>
<td>Winter 2016</td>
</tr>
</tbody>
</table>

*Indicates versionless SaaS
FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria (Cont.)

Vendor inclusion criteria

Vendors included in this Forrester Wave evaluation:

- **Offer a vendor-owned SaaS offering for both performance and learning.** The majority of components of the learning and performance management solutions under evaluation must be available as a multitenant SaaS solution and/or as a single-tenant cloud offering on a subscription basis, with live customers using the SaaS or cloud delivery model. Vendors with exclusively licensed, on-premises deployment models were excluded from the evaluation.

- **Have solutions that have been live for two years or more and actively used by 50+ customers.** The evaluated vendors have both a learning and performance management solution that has been live for two or more years while also currently having 50+ customers live on each product by August 17th, 2016.

- **Have 40+ customer live on integrated learning and performance solutions.** The evaluated vendors provide a performance solution and a learning management system, with at least 40 customers that have implemented and are actively using both applications as integrated offerings as of August 17, 2016.

- **Have $30 million or more in revenue.** All of the vendors in this evaluation had revenues of more than $30 million in their most recent calendar or fiscal year prior to August 17, 2016.

- **Offer a solution that can serve enterprise accounts.** The vendors in this evaluation must have a solution that scales for enterprise use with some live enterprise customers (10,000 or more users) using performance and learning.

- **Recognition by Forrester clients as well as learning and talent development users.** Forrester clients and product end users either mention or ask questions about each vendor in this evaluation in the context of client inquiries related to learning and/or performance management product selection.

Vendor Profiles

This evaluation of the learning and performance management market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2).
The Nine Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: Learning And Performance Management, Q4 '16

Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.
## FIGURE 2 Forrester Wave™: Learning And Performance Management, Q4 ’16 (Cont.)

<table>
<thead>
<tr>
<th>Current Offering</th>
<th>Forrester’s weighting</th>
<th>Cornerstone OnDemand</th>
<th>Halogen Software</th>
<th>Haufe</th>
<th>PeopleFluent</th>
<th>PeopleSoft</th>
<th>Saba Software</th>
<th>SAP SuccessFactors</th>
<th>Talentsoft</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning content and delivery</td>
<td>50%</td>
<td>4.11</td>
<td>2.79</td>
<td>2.33</td>
<td>3.51</td>
<td>3.47</td>
<td>4.17</td>
<td>4.36</td>
<td>3.77</td>
<td>3.19</td>
</tr>
<tr>
<td>Competencies, goals, and performance</td>
<td>25%</td>
<td>4.15</td>
<td>2.35</td>
<td>1.35</td>
<td>2.05</td>
<td>3.70</td>
<td>4.65</td>
<td>4.05</td>
<td>3.45</td>
<td>3.45</td>
</tr>
<tr>
<td>Customer retention</td>
<td>10%</td>
<td>3.55</td>
<td>3.65</td>
<td>2.10</td>
<td>3.45</td>
<td>3.85</td>
<td>3.90</td>
<td>4.85</td>
<td>3.70</td>
<td>2.80</td>
</tr>
<tr>
<td>Reporting and analytics</td>
<td>15%</td>
<td>4.00</td>
<td>4.00</td>
<td>5.00</td>
<td>4.00</td>
<td>2.00</td>
<td>2.00</td>
<td>3.00</td>
<td>3.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Technology</td>
<td>25%</td>
<td>4.60</td>
<td>2.60</td>
<td>2.80</td>
<td>4.40</td>
<td>3.50</td>
<td>4.80</td>
<td>4.80</td>
<td>4.20</td>
<td>3.10</td>
</tr>
</tbody>
</table>

| Strategy                  | 50% | 4.20 | 3.70 | 2.90 | 3.25 | 3.90 | 3.30 | 4.60 | 3.05 | 2.90 |
| Vision                    | 25% | 4.00 | 3.00 | 2.00 | 2.00 | 3.00 | 3.00 | 5.00 | 3.00 | 2.00 |
| Planned enhancements      | 20% | 4.00 | 3.00 | 2.00 | 4.00 | 3.00 | 4.00 | 3.00 | 3.00 | 2.00 |
| Market approach           | 20% | 5.00 | 4.00 | 4.00 | 3.00 | 3.00 | 5.00 | 4.00 | 3.00 | 4.00 |
| Technology strategy and vision | 20% | 4.00 | 4.00 | 3.00 | 3.00 | 3.00 | 3.00 | 5.00 | 4.00 | 3.00 |
| Commercial model          | 15% | 4.00 | 5.00 | 4.00 | 5.00 | 4.00 | 1.00 | 5.00 | 2.00 | 4.00 |

| Market Presence           | 0%  | 3.90 | 2.35 | 3.20 | 2.50 | 3.60 | 3.50 | 4.25 | 4.30 | 2.95 |
| Revenue                   | 25% | 4.00 | 2.00 | 4.00 | 1.00 | 3.00 | 3.00 | 5.00 | 4.00 | 1.00 |
| Revenue growth            | 25% | 4.00 | 3.00 | 4.00 | 3.00 | 3.00 | 3.00 | 2.00 | 4.00 | 4.00 |
| Installed base            | 20% | 3.00 | 2.00 | 1.50 | 2.00 | 4.50 | 4.00 | 5.00 | 4.50 | 2.50 |
| Delivery offices and data centers | 20% | 5.00 | 3.00 | 3.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 |
| Total employees           | 10% | 3.00 | 1.00 | 3.00 | 1.00 | 2.00 | 2.00 | 5.00 | 4.00 | 2.00 |

All scores are based on a scale of 0 (weak) to 5 (strong).
Leaders

› **SAP SuccessFactors is a long-time worldwide leader in performance management.** SuccessFactors provides customers with a market-leading, well-integrated performance and learning offering. The Open Content Network enables users to easily access content developed for both consumer and corporate learning. SuccessFactors is looking to the future of performance as continuous with its continuous performance management (CPM) tool. Technically, SAP SuccessFactors’ learning, performance, and succession offerings are on a single code base: Products support mobile throughout, including offline mobile access, a search capability that enables the users to find formal and informal content they need, and products with a user interface that is intuitive and adaptive. Customers are very satisfied with product integration and product flexibility.

SuccessFactors is less mature in providing full-featured content authoring tools. It has more sophisticated external audience support planned, along with predictive analytics. In learning, the microlearning strategy would benefit from more work on short, single-concept learning. Customers want more in-depth and extensive administrator training as part of implementation — both free as part of startup process as well as packages available at extra cost. SuccessFactors is answering this need through the SAP Learning Hub, which needs to be more highly publicized among clients.

› **Cornerstone OnDemand grows as a major enterprise competitor in the talent space.** It has a natively built talent suite, native web and web-based mobile, a refreshed user interface, and complete support for blended learning. Cornerstone provides leading content services with partnerships with many vendors and a robust marketplace for learning services. Social learning allows users to bring into the system and share useful content such as a video or articles of interest. This worldwide product has machine learning to deliver personalized training as well as “organizational units” that a company creates for more targeted training for those internal as well as external to the business. It also offers career mobility prediction through its analytics offering. Customers like the partnership atmosphere with Cornerstone and their responsiveness to issues.

Cornerstone is working toward a continuous performance offering, but it is challenged to satisfy traditional as well as more forward-looking customers. In employee recognition, the product has elements of gamification, such as badges and points, but lacks other ways of recognizing individuals or groups of employees. Support for microlearning is also an area that that company must address. Predictive analytics is part of its Insights product (extra buy), but Cornerstone is working on offering predictive indicators across the apps.

› **Saba Software is under new administration and has emerged with a strong offering.** It focuses particularly on user-centric learning and performance. It has gone to great effort to make the product simple and flexible while offering the features and depth that different customers need. The product has a broad marketplace that allows users to access content as well as other popular learning and performance resources. The Intelligent Mentor (TIM) enables machine learning across the platform, since it is embedded into the workflow. Robust social features allow social learning
in discussion groups, communities, online meetings, and simple content sharing. Gamification includes standard features as well as a “people quotient” to measure community activity and contribution. The product supports multiple languages at no charge.

Areas for improvement are in the goals and performance areas, including continuous performance and outcome-based goals to add to present continuous feedback through Net Promoter Score. Within goal management, visualization would add a valued feature to the product. With many of its new features, the training offerings for new users and their administrators have lagged behind in helping companies to get started using the products.

**Strong Performers**

› **SumTotal, since its acquisition, has invested heavily in learning and performance.** In 2014, Skillsoft, an eLearning content provider, acquired SumTotal and integrated complementary components from each vendor. For example, customers are able to get an out-of-the-box mapping of the SumTotal competency model to Skillsoft content, making the process seamless. The new UI is more modern and has a consumer-like, icon-driven feel to it. SumTotal has extensive capabilities for creating learning assessments to determine content challenges and successes. It has an innovative strategy that focuses on collaboration with customers, but also attempts to be ahead of customer need with new ideas. SumTotal has done work in offering continuous performance improvement with check-ins and peer and manager feedback. Its new expansion offering features a design-driven approach with simplicity at its core.

Areas for improvement include additional gamification components, built-in and easy-to-use content authoring tools, more collaborative features especially around social learning, and support for microlearning. The product also lacks strong technology features for recognition of employees for their work (even informally from mobile phones) and mentoring via technology to assist employees in determining future direction in career development.

› **PageUp People has a mobile first approach to all product development.** This Australian-based company has 300 enterprise customers. It has expanded to Singapore, Hong Kong, the UK, and the US. The company is known for its ability to work in both developed and high-growth and emerging markets, including bandwidth-challenged areas. In order to assist employees with career growth, it has a dedicated tool, Career Path, which uses algorithms to identify the most common and successful career paths. Its performance system provides offline capability, enabling employees/managers to complete performance reviews on mobile devices when they have no internet connection. In addition to supporting a variety of competency frameworks, PageUp People has its own competency framework that underpins all of its talent management applications, including the ability to link to job roles across the talent management suite. Its commercial model is fairly priced and easy-to-understand.
Areas for improvement are mainly in the learning application. These include developing some content authoring capabilities as well as a tool to develop external assessments. It needs to assist customers with content access by developing relationships with some corporate and consumer content providers. It doesn't yet have a microlearning support feature. The product has some features used in the extended enterprise like a recommendation engine, but needs eCommerce. For personalization of learning, the product does not yet have any machine learning to automatically send learning to employees based on their role, interests, competencies, and behaviors.

› PeopleFluent leads its competitors in its support for video for talent applications. Of the vendor's 5,100 customers globally, 146 are live on performance and learning. The product has content authoring capabilities including an LCMS. Its assessment capability has robust features, including a bank of question templates that can be modified to build a new quiz or assessment. Social learning is well-developed, including a good “Find A Mentor” capability. Formal learning is integrated into the social learning experience, which includes some gamification features. This product stands out for its strong support of blended learning. It does a nice job of supporting formal and informal content along with video and social capabilities. It also provides strong competency support with specific competency libraries as well as integrations with third-party competency providers. It has excellent goal management capabilities. The product supports enterprise customers, with the average customer size approximately 10,000 users.

The learning and performance applications are still on separate code bases, which can provide some technical challenges, although, to the users, the experience is quite seamless. For learning content access, PeopleFluent integrates with Skillsoft and does not yet have a marketplace for other learning vendor services. Other areas of improvement include providing support for microlearning and continuing work around its continuous performance offering especially related to manager coaching.

› Halogen Software is consistently strong in competencies and goal setting. This Canadian-based company has a focus on the mid-enterprise (100 to 5,000 employees). In addition to a standard competency library, Halogen also offers several industry-specific competency libraries with behavioral descriptions, comment helper text, and coaching and tips to support managers. In the area of performance review, the product has a mature and searchable check-in tool for continuous performance with advice for managers on conducting coaching and discussion sessions. Halogen enables integration between learning and performance during performance and talent assessments, one-on-one meetings, and development plans. Interaction with and support of customers earns Halogen high marks. The vendor's pricing model is simple, clear, and provides value for money.

Although Halogen continues to develop its learning offering, there are some areas for improvement: more relationships with third parties for broader access to learning content; more attention to social features for informal learning and as a component of formal learning; user rating of courses; developing support for learning approaches like microlearning; and curating learning from consumer sources like MOOCs and TED Talks. Technically, Halogen needs to go deeper with mobile including offline support. An updated user interface (already planned) will provide a more modern and easier to use experience.
Talentsoft is focused on personalized services for its talent management users. This French-based core HR and talent management provider offers performance and learning as an integrated offering as a result of its merger with e-Doceo, a learning vendor. It has a total of 1,500 joint customers — 700 on learning and 800 on performance or recruiting. Talentsoft’s physical offices are in EMEA, APAC, and central and South America. It services the rest of the world through partners. Its average customer size is approximately 8,000 users. The product has a full-featured LCMS for content authoring, a good quizzing and assessment tool, and the capability to build blended learning offerings. Talentsoft makes good use of video in learning development and has features that allow user-generated content. It has built-in, content-specific competency libraries. The HR analytics offering has some built-in intelligence, analysis, and customized dashboard features to help HR meet business needs.

The product is still on separate code bases for learning and performance, causing some technical issues. Competencies can be enhanced by developing partnerships with competency vendors. Recognition of employees is an area of improvement, achieved by developing more peer-to-peer recognition, employee mentoring capability through technology, and manager and employee coaching. Career growth is another area of development, with ability to link training to jobs and use social feedback.

Contenders

Haufe presents a unique approach to talent development. This German-based company that is part of the Haufe Group provides training and professional development offerings through a very personalized system that is the backbone of the Haufe Group — clients work together with Haufe in total partnership to make the software applications work for their business. This includes consulting days spent on global alignment and governance, pain and needs mapping, the user journey, and configuration of software for implementation. The company’s philosophy is a people-centric approach, and Haufe has 99% customer retention. Although the product does not line up with some of this Forrester Wave criteria in its technical features, it has a highly differentiated process for a deep examination of a company and its people and enables product approaches that work most effectively for a company. Haufe is a very good choice for companies whose first goal is to implement a product that fits the people in the organization and is willing to have a consulting relationship to determine what the application should look like to best fit company needs.

With this kind of vendor/company relationship well-honed, Haufe is now developing many of the features evaluated in this Forrester Wave that they do not have. These include a deeper integration with Cross Knowledge for learning, user-generated content and gamification, details around learner results for an audit trail for compliance, improved reporting and data analysis, and offline mobile learning. Other areas of improvement include content authoring capabilities, social learning integrated with formal courses, and more work on offering a continuous (ongoing) performance review and resetting of goals through a manager/employee coaching relationship.
Engage With An Analyst

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Supplemental Material

**Online Resource**
The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

**Data Sources Used In This Forrester Wave**
Forrester used a combination of data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by August 17, 2016.

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
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› **Product demos.** We asked vendors to conduct demonstrations of their products’ functionality. We used findings from these product demos to validate details of each vendor’s product capabilities.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with a total of 18 vendor current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don’t fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

1 This report reveals the leadership qualities and habits that will help employees reach the required level of customer obsession. Having a customer-obsessed operating model is one thing, but leading the organization to execute it effectively is another. See the Forrester report: “Leadership In The Age Of The Customer.”

2 In 2016 Employee Engagement Benchmark Study by the Temkin Group, companies which excel at customer experience have “1.5 times as many engaged employees as do customer experience laggards.” Source: Bruce Temkin, “Report: Employee Engagement Benchmark Study, 2016,” Customer Experience Matters, February 16, 2016 (https://experiencematters.wordpress.com/2016/02/16/report-employee-engagement-benchmark-study-2016/).

See the Forrester report: “Customer Obsession Is An Employee Engagement Strategy, Too.”

3 We know and have proven that a better customer experience correlates with higher revenue growth. This report details the fundamental reset of day-to-day operations required to drive customer obsession. See the Forrester report: “The Operating Model For Customer Obsession.”

4 In Forrester's 57-criteria evaluation of performance, succession, and learning vendors, we identified the nine most significant software providers — ADP, Cornerstone OnDemand, Halogen Software, Kenexa, PeopleFluent, Saba Software, SilkRoad, SuccessFactors, and SumTotal Systems — in the category and researched, analyzed, and scored them. See the Forrester report: “The Forrester Wave™: Learning And Talent Development, Q1 2013.”

5 Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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