9-Grid™
Authoring Tools
January 2014

An Independent Analyst Perspective into the Authoring Tools Market
CONTENTS

UNDERSTANDING THE ELEARNITY 9-GRID™ ........................................................................................................... 4

THE 9-GRID™ VARIABLES FOR AUTHORING TOOLS ................................................................................................. 5

AUTHORING TOOLS MARKET & TRENDS ...................................................................................................................... 6

ELEARNITY 9-GRID™ VENDOR COMMENTARIES .................................................................................................. 8

Adobe Captivate ............................................................................................................................................................. 9

Adobe Presenter ............................................................................................................................................................ 10

Articulate Presenter ....................................................................................................................................................... 11

Articulate Storyline ....................................................................................................................................................... 12

Articulate Studio .......................................................................................................................................................... 13

Assima Atlantic Link (AAL) ......................................................................................................................................... 14

CM Group Luminosity Studio ...................................................................................................................................... 15

CrossKnowledge Mohive ............................................................................................................................................. 16

eXact learning LCMS .................................................................................................................................................. 17

IMC Content Studio .................................................................................................................................................... 18

Infor ContentCreator ................................................................................................................................................... 19

Kenexa LCMS .............................................................................................................................................................. 20

Lectora Inspire ............................................................................................................................................................. 21

Lectora Online ............................................................................................................................................................ 22

Lectora Publisher ........................................................................................................................................................ 23

Lumesse CourseBuilder ........................................................................................................................................... 24

Sana Software EasyGenerator ................................................................................................................................... 25

Xyleme LCMS .............................................................................................................................................................. 26

WHAT NEXT? ............................................................................................................................................................... 27

ABOUT ELEARNITY ..................................................................................................................................................... 28
Accuracy of Information and Warranties

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Inclusions and Exclusions

Entries into the Elearnity 9-Grid™ for Authoring Tools are made on the basis of the appearance of those tools within Elearnity’s Corporate Research network which focuses on European enterprise scale corporates. As a result there are a number of US based solutions which have been omitted because they do not have an adequate international presence for us to provide a viable commentary around.

This 9-Grid™ does not include mobile specific tools or systems simulations focused tools, even if they can use used in a more generic authoring context , it is not their primary focus.
Understanding the Elearnity 9-Grid™

The Elearnity 9-Grid™ is a five dimensional model that can be used to understand the relative position of solutions and providers in a particular learning and talent technologies market. It allows you to compare different solutions based on their Performance, Potential, Market Presence, Total Cost of Ownership and Future Trajectories across the market. It is unique, because it sees value in all of its zones. It not only provides an understanding of the market, but also identifies the high level actions that can help corporate organisations get the best from vendors.

9-Grid™ is based on Elearnity’s independent research in the Learning and Talent market over the past 17 years, and draws upon the insights and experience of our Corporate Research Network. The Corporate Research Network is a group of learning and talent professionals, who between them represent over 150 of Europe’s leading companies. These companies are typically global enterprise-scale organisations with their Head Offices in Europe (or the EMEA HQ of global companies).

Essentially the 9-Grid™ Model brings together our independent view of solution providers’

- **Potential** - refers to the solution’s scope and sophistication.
- **Presence** - is the solution’s historic and current presence in the market. This includes the size of the customer base, the number of enterprise customers and the overall size of the business, within the scope of the market we are examining.
- **Total Cost of Ownership** means the FULL cost of acquiring, implementing and operating the solution (typically over a 3 year period). Importantly, this includes both internal and external costs.
- **Future Trajectory** - is based on the trends we currently see in the market related to a vendor’s Performance and Potential.

Interpreting the exact position of the vendor in a 9-Grid™ zone is explained in more detail in our Introduction to the 9-Grid document available from our website. [www.elearnity.com/9-grid.html](http://www.elearnity.com/9-grid.html).

**The Critical Difference between the 9-Grid™ and other Analyst Models**

There is a very important difference between 9-Grid™ and other Analyst models. In the 9-Grid™ all of the nine zones have value, and more interestingly, have an associated set of actions that can help you to **maximise the value of the relationship with different vendors**.

This means that being in the top right is not the only valid selection point. For some organisations it may not even be desirable. There are many other zones that offer success, especially when considering a lower Total Cost of Ownership.
The 9-Grid™ variables for Authoring Tools

So, in the context of Authoring Tools – what do potential, performance, presence and total cost of ownership mean?

**Performance**

As usual this still covers the questions of when people make a choice about solutions: do vendors win, are they retained by their customers and do they make their customers happy. This is viewed through the lens of large international corporates and is taken from the experiences we have gleaned from our Corporate Research Network. Which means this may not necessarily reflect the experiences of smaller and mid-sized organisations, where content management may not be a strategic consideration.

**Potential**

Potential means scope and sophistication. In the context of authoring tools, *scope* does not merely relate to the functionality to support e-learning authoring, but also the processes that surround it such as the management of digital assets and generating multiple content outputs for mobile performance support. We no longer live in a single delivery channel environment, and learning content is no longer about “formal e-learning” delivery alone. *Sophistication* includes the depth of configuration and ability to support larger scale content production processes, including centralised and decentralised production models. To score highly here it’s not enough to just have the best e-learning creation to, it needs to also be able to efficiency and effectiveness manage the production and maintenance process.

**Presence**

This is their presence in the enterprise market place and is very much about the size of the customer base as well as presence in the overall market. Again this is not a linear scale, but represent three bandings that group the levels of maturity / distinct groupings we see in the market. Higher Presence solutions will have large numbers of corporate enterprise scale customers and high overall user numbers.

**Total Cost of Ownership**

In the context of Authoring Tools, TCO is the full lifecycle cost associated with the use of tool, including the cost of acquiring and implementing it, but also the impact it has on the cost of production, translation and localisation, and maintenance of content, as well as upgrade overheads of the platform itself. Our TCO is estimated from the perspective of larger enterprises with multiple authors/project members, and with multi-lingual content needs. It also assumes large numbers of courses. For those working with small scale e-learning authoring needs, the banding for lower and higher TCO would be calibrated differently. The real scalability of tools becomes apparent with larger scale content production and content management needs.

**Trajectory**

For Authoring Tools, Trajectory is our sense of potential direction of travel in terms of both Performance and Potential. Trajectory is measured relative to the current Performance and Potential of that solution and the market as a whole. It is not a relative positioning compared to other solutions in the same zone.
Authoring Tools Market & Trends

Authoring continues to be an important part of the corporate learning architecture, although it has not probably had the level of strategic consideration of other learning platforms such as LMS, for example. In that respect, there are certainly dividing lines between those who favour more tactical desktop based content production and those with more collaborative or strategic learning content management approaches. But, regardless of your current solution preferences, here are some of the trends that may influence your choices over the coming year:

**Needing an answer for Mobile Learning** - The most significant recent change in the Authoring Tools market has been the growth in expectations around delivering mobile learning. Whilst still in the early adopter stage, most L&D teams are considering how to provide mobile learning - even if the question about what mobile learning is really required for in their organisations is still unclear.

Mobile raises some big challenges about content re-use and delivery to multiple devices. No one wants to further multiply production costs; there has been a rush to deliver HTML5 outputs and responsive design. Interestingly, one of the compromises that authors have to make by creating content in HTML5, is on the richness of e-learning that’s produced. Some of the “Flashiness” is no longer available. Note: This may also further erode one of the criticisms of LCMS tools in the past - that they produced simpler content outputs.

**The Rise and Rise of Video** - As global bandwidth has increased and video becomes ever more ubiquitous, embedded video has also become a standard feature of e-learning programmes. It is now used not just for creating a “narrative”, but also as a means of capturing instruction and expert knowledge.

**Smaller and Smaller Learning Chunks** - Learning modules are getting shorter and shorter. 6 years ago courses would typically have been 20 to 30 minutes long and three years ago perhaps down to 10 to 20 minutes long. Now we frequently see 5 to 10 minutes long content, created as learning bites which can combined into a more comprehensive learning experience.

**Better learning by design, through Gamification** - Another significant future impact on learning tools is the rise of gamification. Gamification is the use of game like techniques to engage learners, such as the use of badges as rewards, the use of levels, narrative and leader boards. Many tools are already starting to incorporate these features; we expect this to grow significantly over the coming year.

**The Experience API, Game-changer in waiting** - The trends of video, mobile delivery, content chunking and gamification may all converge in a way that will drastically impact e-learning authoring. The advent of the Tin Can API project, which has been refined into the Experience API, will start to redefine what we expect from learning authoring tools over the years to come. Potentially, it also offers a massive opportunity for those vendors with an understanding of content management to make a stronger play; greater content volumes require more granular search tools and more effective management to be successful.

**Increasing Traction for Collaborative Authoring Tools and Approaches** - Despite the economic pressures to generate learning faster and more efficiently, one surprising aspects of the authoring tools market has been the continued dominance of desktop tools within enterprise organisations. Whilst the tide isn’t yet turning against the dominance of the desktop approach, there are some undercurrents of change. Collaborative authoring tools, with their support for shared templates, asset libraries, production workflows,
roles and quality assurance, are starting to be seen as a natural next step in authoring maturity when e-learning project volumes grow and translation needs are high. Whilst they currently have nowhere near the same level of market share as Desktop tools, their appeal is starting to grow. Some European players are starting to bridge the divide between the flexibility and entry point pricing of desktop tools, and the operational scalability found in collaborative tools.

**LCMS still to move beyond early adopters in the Authoring space** - LCMS solutions, despite the proclamations made by US analysts over 10 years ago, have struggled to make the impact in the authoring market place that perhaps they should have. Some of this undoubtedly comes down to their inability to clearly communicate their value proposition, as well as the high cost of entry. LCMS solutions were seen as a premium enterprise platform, and as a result only those with highly volumes of volatile, critical content adopted them. Some of these barriers still exist, but the value of an LCMS model is potentially very high and well suited to a multi-channel world.

**Social Content Development – a more democratic approach** - Who are the e-learning authors of tomorrow? Content is not going to be only created by e-learning experts, it will increasingly be created by Subject Matter Experts themselves. Some of the collaborative authoring tools already support this, but social content is going to be an important aspect of the future of all authoring tools. This raises some important questions regarding control, content expiry, content validation, and version control, as well as the re-use of content across different devices and learning contexts. But even more importantly, the ease of generating social content with sound instructional design frameworks will be vital to ensuring good learning outcomes.
Elearnity 9-Grid™ Vendor Commentaries

This section provides short commentaries around the placement of different vendors featured in the 9 Grid™ Model, outlining the Elearnity view of their Performance, Potential, Presence, Total Cost of Ownership and Trajectory.

The vendors which have been featured in this report, in alphabetical order are:

- Adobe Captivate
- Adobe Presenter
- Articulate Studio
- Articulate Storyline
- Articulate Presenter
- Assima Atlantic Link
- CM Group Luminosity Suite
- CrossKnowledge Mohive
- eXact learning LCMS
- IMC Content Studio
- Infor ContentCreator
- Kenexa LCMS
- Lectora Inspire
- Lectora Online
- Lectora Publisher
- Lumesse CourseBuilder
- Sana Software EasyGenerator
- Xyleme LCMS
Adobe Captivate

**Company:** Adobe  
**Rating:** Core Leader  
**Category:** Authoring Tools  
**Website:** www.adobe.com  
**Date:** January 2014  

9-Grid Commentary:

**Performance**  
Highly successful well established solution. One of the market leaders in desktop based authoring with strong following within EMEA and globally. Often used in conjunction with other development tools. Steeper learning curve than other simpler desktop authoring tools but once mastered can be very effective.

**Potential**  
Historically focused on delivering systems simulations. Latest release significantly expands its capabilities to support a wider range of content production. HTML5 compatibility for mobile e-learning could be better. Tightly integrated with a number of Adobe tools. Lacks workflow support and collaborative authoring features.

**Presence**  
Very widely used with mass market appeal and particularly popular with more technical developers who can leverage more complex functionality. Extensive corporate presence due to simulation capabilities.

**Total Cost of Ownership**  
Pricing attractive to many, especially when bundled as part of the Adobe eLearning Suite. Monthly subscription based pricing model available as well as outright purchase. Content maintenance and management overheads can become expensive for high volume or large scale production.

**Trajectory**  
Likely to continue to be a strong presence in the desktop tools market place, but faces stiff competition from other market leading competitors. Longer term reliance on Flash an issue.
Adobe Presenter

Company: Adobe
Rating: Strong Performer
Category: Authoring Tools
Website: www.adobe.com
Date: January 2014

9-Grid Commentary:

Performance
Significant market presence - not quite as mass market as market leaders but popular for those wanting PowerPoint conversion capability.

Potential
Simple entry level PowerPoint conversion tool for rapid development of comms and briefings. Simple features with the focus on usability, but limited on level of interactivity that can be added.

Presence
Extensive corporate presence with ease of use means it is accessible to a wide range of users. For international organisations there are solutions that are better suited to multi-lingual projects and localisation.

Total Cost of Ownership
There are certainly lower cost PowerPoint plug-in tools available, but few can match the level of ongoing innovation that Adobe brings. Latest version offers mobile support as well as scenario templates. Monthly subscription based pricing model available as well as outright purchase. Difficult to scale for localisation and translation of volatile content.

Trajectory
Ease of use and integration with other Adobe tools such as Captivate and Connect ensures it will remain attractive to corporate users for rapid e-learning development, but beyond this there are clear limitations.
**Articulate Presenter**

**Company:** Articulate  
**Rating:** Strong Performer  
**Category:** Authoring Tools  
**Website:** www.articulate.com  
**Date:** January 2014

**9-Grid Commentary:**

**Performance**
Highly successful platform for Articulate, and early mass market solution. Solution has waned as broader suite has grown and more experienced users now turning towards Storyline.

**Potential**
Entry level PowerPoint conversion tool suitable for creating rapid e-briefings and comms. Accessible tool for non-e-learning experts but those looking to do more will quickly reach its limits.

**Presence**
Extensive corporate presence because of ease of use. Can be purchased as a content production tool outside of the Articulate Studio suite. Particularly popular to create briefing style learning solutions.

**Total Cost of Ownership**
Entry priced desktop authoring solution. Character packs can add considerably to cost. Weak in managing translation and localisation means management of multi-lingual content can be expensive.

**Trajectory**
Popular product but likely to be eclipsed by StoryLine over time.
Articulate Storyline

Company: Articulate
Rating: Core Leader
Category: Authoring Tools
Website: www.articulate.com
Date: January 2014

9-Grid Commentary:

Performance
Launched in 2012, Storyline has achieved rapid market growth and significant traction. Appeals to those looking to author more complex content, often including scenarios. Powerful but simple to use. Significant move for Articulate away from PowerPoint based authoring.

Potential
Next generation solution that addresses many of the weaknesses of Articulate Studio, offering layers of richer authoring capability. Tablet capable through HTML5 and iOS App for iPads. Translation capabilities much greater than Studio.

Presence
Has achieved good initial take up within many corporate organisations across Europe. Strong competitor in many desktop based procurement decisions. Very strong online community offering support from other users, as well as directly from Articulate.

Total Cost of Ownership
Can be perceived as costly when compared to some desktop competitors. Can be purchased outright or on a monthly subscription plan. Membership plan reduces upgrade costs and provides dedicated support. Needs asset and workflow support if it is to be truly scalable for enterprise sized corporates and reduce content maintenance overheads.

Trajectory
Rapidly growing platform with strong advocacy from early adopters, especially those with a strong e-learning background. Likely to go from strength to strength to be one of the benchmark desktop e-learning platforms.
Articulate Studio

Company: Articulate
Category: Authoring Tools
Rating: Core Leader
Website: www.articulate.com
Date: January 2014

9-Grid Commentary:

Performance
Very popular rapid desktop authoring tool, historically the benchmark tool in rapid e-learning. Extensive user base, due to ease of use and strong functional capabilities. Vibrant and supportive online community. Many new features ported across from Storyline.

Potential
Entry level solution with template driven authoring approach. Simple to use, incorporating Engage and Quizmaker to enliven the learning experience. Lacks flexibility for more experienced developers. Translation has been an issue for multi-national organisations and still not rectified in the latest release, despite being available in Storyline.

Presence
Has a wide spread following within many corporate learning and development teams that focus on rapid development. Appeals due to authoring in PowerPoint and simplicity of adding interactions to create professional looking content. For those willing to invest more time and effort, Storyline is a better long term proposition.

Total Cost of Ownership
Pricing competitive but not as low cost as other popular desktop options. Can be purchased outright or on a monthly subscription plan. Membership plan reduces upgrade costs and provides dedicated support. Higher overheads for enterprise scale content production especially for multi-lingual organisations.

Trajectory
Latest release launched in Q4 2013, likely to lead to a flurry of upgrades. Longer term will be interesting to see if Storyline becomes the lead proposition. Still popular for those new to authoring or with simpler needs.
**Assima Atlantic Link (AAL)**

**Company:** Assima  
**Rating:** Potential Challenger  
**Category:** Authoring Tools  
**Website:** www.assima.net  
**Date:** January 2014

**9-Grid Commentary:**

**Performance**  
*One of a number of successful collaborative authoring platforms in the UK market. Some notable customers but lost some momentum since acquisition by Kaplan. Subsequently acquired by Assima.*

**Potential**  
*Was an early innovator in the rapid e-learning market. Server based authoring platform with good all round capabilities. Has been overtaken functionally by larger competitors and lacks significant recent innovations.*

**Presence**  
*Historically a popular solution option for collaborative e-learning authoring in the UK. Some customer attrition in last couple of years. Low global presence.*

**Total Cost of Ownership**  
*Was competitively priced. Limited collaboration and lack of workflow impacts content maintenance and life cycle costs.*

**Trajectory**  
*Long term roadmap for Atlantic Link is unclear. Expect to see continued customer attrition unless significant additional investment to maintain innovation and market presence.*
CM Group Luminosity Studio

Company: CM Group
Rating: Potential Challenger
Category: Authoring Tools
Website: www.cm-group.co.uk
Date: January 2014

9-Grid Commentary:

Performance
Authoring tool from UK based company. Some interesting global customers. Still to gain significant traction across wider European market although used extensively by CM Group in own client work.

Potential
Easy to use, HTML focused collaborative authoring platform with strong instructional design and assessment capabilities. Mobile learning compatible formats for phone, tablet and desktop. Good range of configurable options for more advanced designers.

Presence
Limited customer presence in UK so far, and little outside UK other than global customers. UK customer base includes finance, telecoms and software brands.

Total Cost of Ownership
Slightly lower purchase cost compared to other collaborative platforms. Provides significant opportunity for lowering operational costs through its collaborative production capabilities.

Trajectory
Established capability in content development but currently low market visibility compared to desktop competition. Growing mobile authoring functionality enhances a strong core collaborative e-learning authoring solution.
CrossKnowledge Mohive

Company: CrossKnowledge
Rating: Core Challenger
Category: Authoring Tools
Website: www.crossknowledge.com
Date: January 2014

9-Grid Commentary:

Performance
One of the most successful European collaborative authoring tools, which gained good traction with some leading companies interested in rapid e-learning. Little real progress since acquisition by CrossKnowledge but recent investment likely to further boost market profile.

Potential
Early entrant in to the collaborative authoring space with good track record of supporting a Subject Matter Expert driven authoring approach. Strong workflow grounded in e-learning project realities. Recent extensive re-write will streamline production processes and increase mobile publishing capabilities. Good asset management features to support a larger community of developers.

Presence
Mid level presence overall - but good presence in Europe within a corporate setting for a collaborative server based tool.

Total Cost of Ownership
SaaS-only solution. Cost originally quite high but more realistic pricing helped to reduce to a more viable level. In order to drive real value from Mohive there has to be a cross enterprise authoring need to leverage the strong collaborative features.

Trajectory
Maintaining market position, and next release in 2014 promises new market messaging and richer proposition. May bring new momentum. Strong potential to grow in European market, and especially France.
**eXact learning LCMS**

**Company:** eXact learning solutions  
**Rating:** Strategic Challenger  
**Category:** Authoring Tools  
**Website:** www.exactlearning.com  
**Date:** January 2014

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**9-Grid Commentary:**

**Performance**  
Italian LCMS company with historically high profile in LCMS market and EU research. Some significant customer success stories, but limited current market momentum. Has suffered the same complexity challenges as other LCMS providers. But also some loss of customer focus during ownership changes in 2013.

**Potential**  
Robust LCMS platform, with rich feature set including mobile. Strong track record with production orientated authoring approaches. Lacks some of the interactivity richness offered by desktop solutions. Rich workflow and asset management features.

**Presence**  
The only truly European complete LCMS solution. Has a strong LCMS pedigree, but limited market traction overall. Visibility has waned since their acquisition by Lattanzio group early in 2013, but we believe will be seeking to reverse this in 2014.

**Total Cost of Ownership**  
High entry costs both in terms of license and initial implementation - partly due to solution’s complexity. Dynamic delivery and asset management can have significant impact on reducing costs of maintaining multi-lingual and volatile content.

**Trajectory**  
Loss of momentum since acquisition by Lattanzio Group. Well placed to take advantage of latest e-content trends including mobile.
**IMC Content Studio**

**Company:** IMC  
**Rating:** Solid Performer  
**Category:** Authoring Tools  
**Website:** www.im-c.de  
**Date:** January 2014

**9-Grid Commentary:**

**Performance**  
Long established, desktop based entry level platform with a strong template driven approach. Has gained some traction in large German corporates and Higher Education, but yet to achieve significant progress in wider European market place.

**Potential**  
Good entry level HTML based authoring platform offering strong core functionality. Big emphasis on ease of use and rapid content development. Very intuitive author experience. Some good translation functionality and mobile content development capabilities.

**Presence**  
Strong record in Germany, where IMC are headquartered, but less visible in corporate sector across Europe as a whole. Sits alongside IMC’s wider learning suite.

**Total Cost of Ownership**  
Competitively priced and easy to use. A good platform for entry level users, especially if they purchase other IMC products. Collaborative features contribute to reducing cost of overheads in larger content development projects.

**Trajectory**  
Solid performer, but still to break out of its existing market strong hold in Germany and surrounding countries.
Infor ContentCreator

Company: Infor
Rating: Potential Challenger
Category: Authoring Tools
Website: www.infor.com
Date: January 2014

9-Grid Commentary:

Performance
Typically seen as a component of Infor’s LMS proposition. Some interesting capabilities but has failed to create its own distinct market identity. Limited traction, customers are almost exclusively hybrid LMS users.

Potential
Robust collaborative authoring platform, with good e-learning authoring capabilities. Lack of mobile readiness may be an issue for some.

Presence
Low Presence in EMEA as historically sold as part of the CERTPOIN TVLS (now Infor LMS) solution. Some high profile customers. Advantages of tight integration with Infor LMS to drive efficiencies.

Total Cost of Ownership
Not sold as an independent platform, but part of a wider LMS package, the pricing has been obscured by bundling. Not the lowest cost solution available, but tight integration with Infor LMS has provided operation cost savings when deploying content.

Trajectory
Has failed to break out of the shadow of the LMS platform. Unlikely to see greater focus or significant further investment following acquisition into the Infor HCM suite.
**Kenexa LCMS**

**Company:** Kenexa, an IBM Company

**Rating:** Strategic Challenger

**Category:** Authoring Tools

**Website:** www.kenexa.com

**Date:** January 2014

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**9-Grid Commentary:**

**Performance**
As OutStart, was one of the best known LCMS solutions with a reputation in organisations for mass content production. Complex to implement but able to support very high scale production. Continued investment under Kenexa ownership, and now part of IBM’s Smarter Workforce initiative.

**Potential**
Complex solution with rich feature set for managing production and delivery in all formats. Approach better suited for large scale multi format content production rather than interactive e-learning design. Strong content management and maintenance features.

**Presence**
Widely used LCMS platform, acquired by Kenexa and now part of IBM. Well established in large scale Defence, Public Sector and Corporate production scenarios. Historically struggled to transfer value proposition into mass market.

**Total Cost of Ownership**
Targeted typically at enterprise-scale customers, with associated price tag. High entry costs in licensing and initial implementation. Strongest value proposition is in high scale production environments - especially in managing multiple content formats.

**Trajectory**
Significant investment in the platform and innovation planned since IBM / Kenexa acquisition. Still LCMS market leader overall, but needs to broaden appeal and lower barriers to entry.
**Lectora Inspire**

**Company:** Trivantis  
**Rating:** Core Leader  
**Category:** Authoring Tools  
**Website:** www.lectora.com  
**Date:** January 2014

9-Grid Commentary:

**Performance**
Popular desktop authoring suite. Inspire comprises of Lectora Publisher and three additional tools of Flypaper, Camtasia, and Snagit allowing you to create Flash animations, manipulate video/audio and capture/edit screen images. Designed to compete with other desktop authoring suites. Widely used.

**Potential**
Comprehensive, fully integrated solution with a very similar feature set to its competitors. Has some unique features regarding certifications and QR codes but overall the interface is less intuitive than others. Good mobile learning support and light HTML output has always been a bonus.

**Presence**
Has maintained its presence, where already established, but appears to be being overtaken by other newer solutions. Overall product community not as energised and engaged as other options.

**Total Cost of Ownership**
Dependent on needs Inspire probably offers better value for money than purchasing Publisher alone, but it still costs considerably more than the competition.

**Trajectory**
Will continue to appeal to more experienced developers who want to have less limitations, but in the long term is not likely to match the same levels of popularity as others.
Lectora Online

Company: Trivantis
Rating: Potential Challenger
Category: Authoring Tools
Website: www.lectora.com
Date: January 2014

9-Grid Commentary:

Performance
Server based collaborative authoring platform. Value proposition not clear to established user base and initial versions showed limitations. Very limited corporate European adoption.

Potential
Collaborative model has more potential than current uptake would appear to indicate. Seemingly greater focus on the functionally superior Inspire Suite, but does have added advantage of collaborative authoring. Limited sophistication compared to other collaborative authoring tools.

Presence
Relatively little presence in EMEA, especially given success of their desktop authoring solution.

Total Cost of Ownership
Monthly subscription fees appear expensive, given limited product functionality, but in line with other collaborative authoring tools.

Trajectory
So far, making relatively little progress. Emphasis still on desktop tools and suite.
Lectora Publisher

Company: Trivantis
Rating: Core Leader
Category: Authoring Tools
Website: www.lectora.com
Date: January 2014

9-Grid Commentary:

Performance
Well established player and still one of the biggest names in the e-learning authoring world. Still has widespread appeal across European corporates. Relatively, has seen a slow down in its market momentum in recent years.

Potential
Good e-learning platform, albeit hardly a genuinely rapid authoring platform. In the right hands can produce polished results. Strong feature set, but lacks the intuitive feel of leading alternatives. Steeper learning curve than others.

Presence
Still widespread mass market adoption, but more a legacy position rather than rapidly growing. Available as part of the Lectora Inspire product suite including Camtasia.

Total Cost of Ownership
Looks expensive when compared to its main desktop authoring competitors but does offer greater scope for those wanting to create more complex content.

Trajectory
Maintains a strong position in e-learning authoring circles, but popularity has declined in the face of stiff competition from other desktop tools.
Lumesse CourseBuilder

Company: Lumesse
Rating: Core Challenger
Category: Authoring Tools
Website: www.lumesse.com
Date: January 2014

9-Grid Commentary:

Performance
Collaborative authoring solution with strong core of users with good customer advocacy. Platform offers good balance between e-learning authoring and collaborative workflow and production management. Has a good track record in Scandinavia and UK - but limited adoption elsewhere.

Potential
Recent rewrite of platform gives significant mobile capabilities, and has further strengthened collaborative authoring credentials.

Presence
Limited to a number of global corporates, but heavily used by Lumesse’s content business. Has lacked the market visibility to grow as significantly as it might have done. Some significant global corporates in UK and beyond.

Total Cost of Ownership
Moderately priced compared to other collaborative tools, but more expensive than desktop tools at lower author numbers. Concurrent pricing approach to help global organisations manage costs. Good ongoing cost of ownership and provides good workflow and productivity features to reduce larger scale operational costs.

Trajectory
Has lost market momentum since acquisition by Lumesse, a talent management solutions provider. Messaging has been subsumed, if not lost, in the wider Lumesse talent management agenda. Offers significant potential as an e-learning development platform.
Sana Software EasyGenerator

Company: Sana Software
Rating: Potential Challenger
Category: Authoring Tools
Website: www.sanasoftware.com
Date: January 2014

9-Grid Commentary:

Performance
Emerging Dutch based authoring platform that bridges desktop and server based approaches. Growing interest both in Europe and US.

Potential
Innovative platform that offers the sophistication of desktop tools and the collaborative and asset management tools of server based solutions. E-learning only - no significant document publishing functionality.

Presence
Limited global enterprise customer base to date, but has received positive market recognition in 2013.

Total Cost of Ownership
Competitively priced. Collaborative authoring at a desktop pricing level. Asset management and workflow features positively impact TCO for higher scale content production needs.

Trajectory
An interesting entry point for those looking for larger scale production capabilities. Low cost, combined with collaborative authoring features. Could have a disruptive impact on authoring tools market.
Xyleme LCMS

Company: Xyleme
Rating: Potential Leader
Category: Authoring Tools
Website: www.xyleme.com
Date: January 2014

9-Grid Commentary:

Performance
Strong reputation as an enterprise-class LCMS provider in the US, but much lower European footprint to date. Has lacked regional operational presence to truly engage with European corporates. Has also experienced some of the same complexity challenges as other LCMS providers. Initial customer advocacy seems very positive.

Potential
Recognised innovators with a richly capable XML based LCMS and authoring suite. Strong content delivery options with good functionality to support all content types including mobile, performance support, document based learning and e-learning content. Efficient content production and maintenance including robust workflow management.

Presence
Stronger US presence with many US global corporate customers. Has yet to translate into significant European corporate visibility or success so far.

Total Cost of Ownership
High entry costs compared to desktop tools, but comparatively priced to other LCMS solutions. XML content re-use likely to provide cost advantages for those managing multi-format content.

Trajectory
Well placed to take advantage of increasing trends in digital convergence and multi-channel learning delivery when combined with their Bravais and Pastiche solutions. Xyleme will need to strengthen their European operations and regional partners if they are to drive significant market momentum in Europe.
What Next?

Get a Deeper Perspective into Vendors and their Solutions

If you want even more “in depth” insights into Learning and Talent solutions, Elearnity is ideally placed to help, with over 17 years of experience in Learning and Talent Management Innovation and Technology. As part of our Vendor Perspectives Programme we also offer Deep Perspectives on Learning and Talent Management Solutions.

These are typically 15 -20 page reports which provide detailed, independent insight into the leading solutions in the learning, performance and talent market. These reports give you independent insights into solutions scalability, flexibility and functionality. They are intended to be used as a critical reference source to inform your solutions review or selection processes.

A full list of reports is available from our website. [www.elearnity.com/deepperspectives.html](http://www.elearnity.com/deepperspectives.html).

They cover a range of solutions including Learning Management Systems, Authoring Tools and Bespoke e-learning development, for example.

Accelerate and De-risk your Decisions

Elearnity provide a range of independent advisory services.

We will use our independent expertise to provide you with the guidance you need to accelerate and de-risk your decisions. We have a wealth of experience, tools, research and profiles at our disposal. We don’t have any “products” to sell and we have no “vested interest” to bias your outcomes. We concentrate on pragmatic, independent advice.

To talk to us about our research into Talent and Learning Technology, or to discuss what trends might mean specifically for your organization, please contact us at info@elearnity.com or by phone at +44 (0)20 7917 1870.

Alternatively, to find out more please visit our website at [www.elearnity.com](http://www.elearnity.com).

If You Are a Vendor

Elearnity is constantly researching the market, via our direct research projects, through conversations with our Corporate Research Network and via direct vendor tracking and briefing.

Vendors interested in engaging with Elearnity more deeply are encouraged to consider joining our Enhanced Vendor Programme (EVP) which enables a more detailed briefing process and associated services. More information on EVP is available on our website at [www.elearnity.com/EVP.html](http://www.elearnity.com/EVP.html) or please contact David Perring at +44 (0)20 7917 1870 to discuss with you in more detail.
About Elearnity

Founded in 1996, Elearnity is Europe’s leading independent Talent and Learning Analyst providing independent expert research, analysis and advice on corporate talent and learning innovation and technologies. We provide expert independent advice to help organisations accelerate and de-risk their corporate strategy.

All our services are underpinned by a unique independent expert understanding of corporate talent and learning based on extensive research and independent market profiling. We provide two core services:

- Talent and Learning Analyst Research with in-depth best practice research, strategic market analysis, news and commentary
- Independent Advisory Consultancy on strategy and best practice

Our research and analysis covers key innovations that are challenging corporate organisations. Topics include: learning and HR transformation, talent and learning strategy, e-learning and blended learning, learning management strategy and systems, integrated talent management, impact and ROI, performance development and management, learning content strategies, learning ecosystems, LCMS and mobile learning.

Elearnity’s research process focuses on developing deep insights of corporate realities and best practice, and independent understanding of vendor capabilities and actual performance.

Our analysis and advisory process focuses on providing objective unbiased advice specific to your organisation and business context.

Example clients include: Aviva, BAA, Boots the Chemist, BP, BT, HSBC, Lloyds Banking Group, PricewaterhouseCoopers, Reuters, Rolls-Royce, Royal Bank of Scotland, RSA Group, Shell, Swiss Re, Telefonica and Vodafone.

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