



Research Advisory Group Report



Learning and Talent Management Systems Buyer Study

Conducted By:

Elearning! & Government Elearning! Magazines

June 2012

Sponsored By:



Executive Summary

In *Elearning!* and *Government Elearning!* magazines' Learning (LMS) and Talent Management (TMS) Systems Buyer Survey, 45% of all respondents plan to add, change or replace an LMS or TMS and 61% who do not currently own a system plan to acquire one. Executives expect to invest more than \$439,000 on the system(s), down from 2011's \$590,400.

This study of 245 respondents summarizes the results of the survey and provides a perspective on brand and product awareness, buyer satisfaction, 'must have' features and a profile of new LMS and TMS buyers. Insight into the decision-making process will also be reviewed.

LMS/TMS Buying Intentions and Timing

- 82% of respondents have an LMS/TMS installed, level with 2011. 1.4 systems are deployed in the typical respondent's organization.
- 45% of all respondents plan to add, change or replace their LMS; and, 83% will do so over the next 24 months.
- Talent suites are increasing in utilization at 22%; Yet, 41% of respondents plans to purchase a new system, tripling the installed base.
- All LMS & TMS owners graded their current systems from 2.1 to 2.8 on a 4 point scale, indicating a lack of satisfaction across a number of variables. System satisfaction has dropped steadily.

Brand Preferences

- For the second year, SumTotal Systems leads in brand ownership maintaining 11% share. From there, a lot of shifts have occurred.
- Top TMS brands current owned are: None 78%. Oracle leads at 26% share.

Features Sought

- Buyers are seeking more capabilities including integrated reporting (71%), mobile authoring (68%) and social network tools (41%). New to the list is Cloud/SaaS (44%) systems.
- Talent system buyers top 'Must Haves' in their future systems are Performance management (46%) and reviews (44%), Skills gap analysis (44%).

Buying Roles and Trends

Which LMS/TMS brands lead in awareness? Who makes the learning and talent system decision? Who approves the purchase? Which products are hot and which are not? Download the complete report to learn these answers and more at www.2elearning.com under Resource Center/Research.

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Methodology:

Elearning! and *Government Elearning!* Magazines executed a 29 question web-based survey to executive subscribers from corporate business, government, non-profit and educational institutions. During the data collection period of May 20th through June 20th, 2012, participants were contacted through an email invitation with an embedded URL link to take the online survey. *Elearning!* and *Government Elearning!* magazines' editors compiled and tabulated the results of 245 completed surveys. This report summarizes the results of the survey and provides a perspective on brand and product awareness, buyer satisfaction, sought features and a profile of new LMS and TMS buyers. Insight into the decision-making process as well as who owns the system(s) is confirmed.

Survey Objectives:

- To provide a respondent profile based upon demographic data,
- To discover the respondents' LMS and TMS usage and implementation plans, satisfaction ratings of current solution(s) and required features of future systems,
- To obtain brand awareness information across Learning Management Systems (LMS) and Talent Management Systems (TMS) and rankings,
- To understand the decision-making and ownership roles within organizations for LMS and TMS.

Respondent Profile:

- All respondents are employed within corporate, government or educational institutions. (See Appendix 3)

	2012	2011
Corporate	74%	80%
Fin/Banking/Ins/RE/Legal	15%	26%
Retail/Hospitality/Entertainment	11%	13%
Healthcare/Pharma	10%	11%
Manufacturing	7%	10%
Telecom/Cable/TV/Utilities	7%	8%
Computer SW/Web/Svcs	11%	8%
Professional Svcs	6%	3%
Other business svcs	4%	1%
AEC	2%	0
Natural Resources	1%	0
Public Sector	26%	20%
Government/NPO/Military*	17%	13%
Education	9%	7%

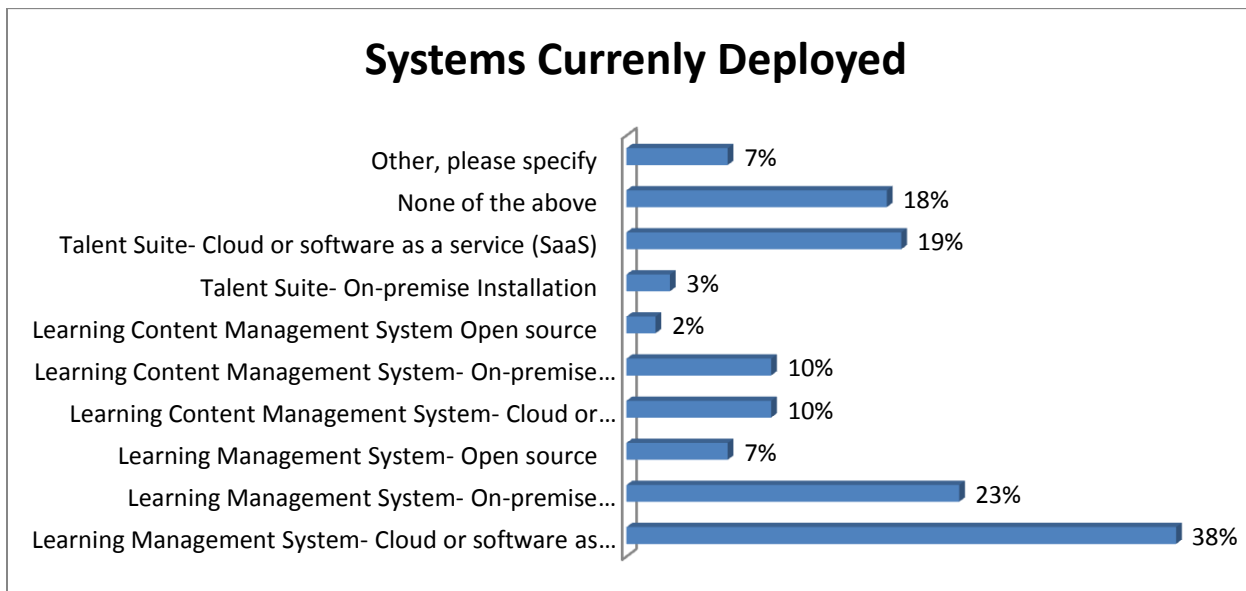
Respondent Profile:

- Management titles accounted for 56% of responses vs. 67% in 2011. Chief executives accounted for 6% of responses and VP, Director, Manager accounted for 49% of respondents. 44% of respondents were non-management vs. 33% in 2010. (See Appendix 3 for title breakout)
- In 2012, functional areas were queried separately from title. 69% had training, development, education role, 8% were HR/Talent/People and 5% Corporate/Agency Leadership. 14% are within sales, marketing, customer, IT, operations, finance, accounting or administration.
- Executives expect to invest more than \$439,000 on the system(s), down from 2011's \$590,400.

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LMS & TMS Usage: Current Deployment

- 82% of respondents have an LMS or TMS in the organization level with 2011. 23% use an enterprise LMS (vs. 26% in '10), 38% use SaaS/Cloud-based LMS (vs. 44% in '11) and 7% open-source LMS (down from 8%). 10% use an Enterprise LCMS, 10% SaaS/Cloud LCMS and 7% open source LCMS. 7% reported other and included custom built LMSs and vendor supplies LMS functionality hosted within content and authoring solutions.
- 7% report Other system type which are custom built, in-house solution or content or tool vendor supplied LMS.

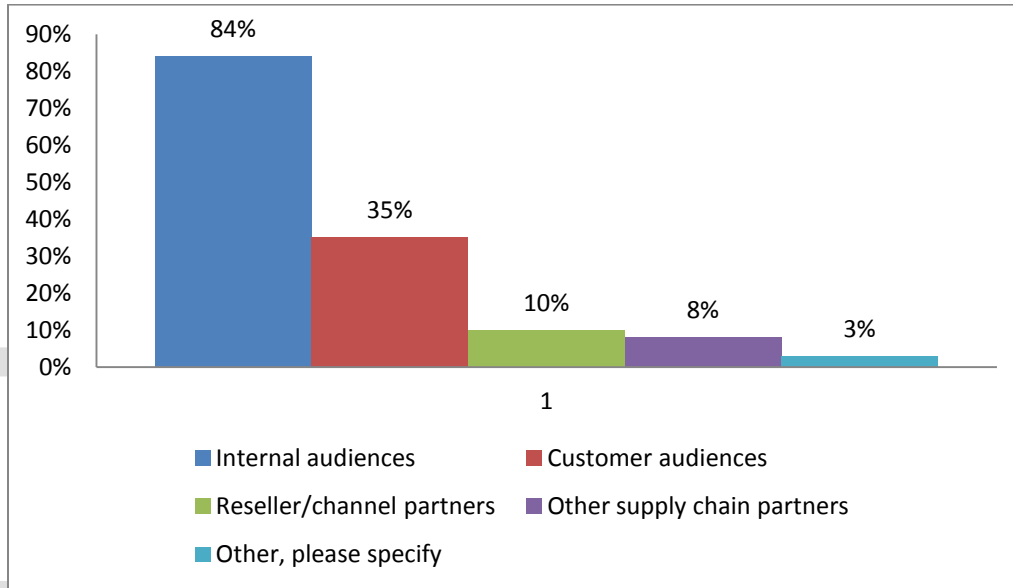


- Talent suites are implemented by 22% up from 16% in 2011. SaaS based TMS account for 19%, almost 200% higher than 2011 and Enterprise TMS account for 3%, 50% lower than 2011.
- 71% of TMS owner respondents are using their system across multiple locations vs. 69% in 2011, and 31% support multi-national sites vs 37% in 2011.
- Respondents deploy 1.4 Learning and/or talent systems on average.

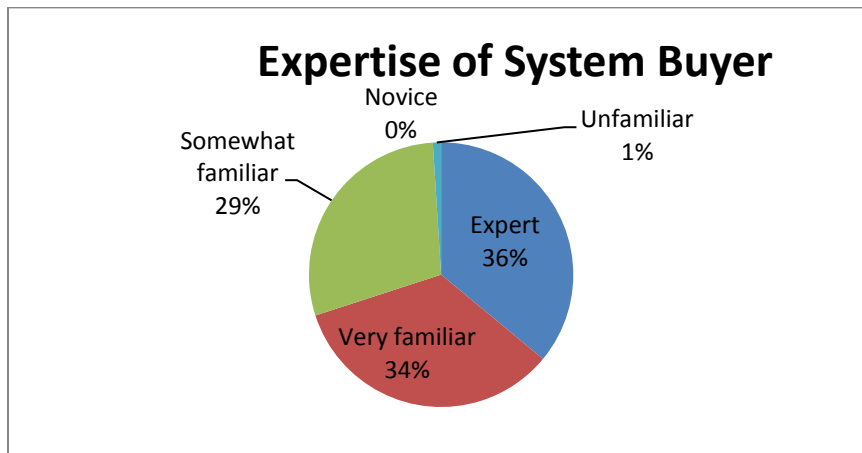
LMS & TMS Usage: Current Deployment

- While 84% of respondents use LMS/TMS to support employees vs 91% in 2011, 53% report supporting external constituents vs. 46% in 2011.

LMS/TMS Audiences Supported



- 99% of respondents are familiar with Learning and Talent Management Systems. 36% are expert vs 29% in 2011. 70% of current LMS owners consider themselves expert or very familiar, up from 64% in 2011. This improvement in buyer knowledge should aid in system selection and satisfaction in future years.



LMS & TMS Usage: Grade Card

- 89% of owner respondents named their LMS brand, level with 2011. 7% of owners named multiple LMS brands.
- 59% of TMS owners named their brand down from last year's 68%. 8% have multiple TMSs deployed in the organization, down from 11% in 2011.
- All LMS & TMS grades continue to be low indicating dissatisfaction with the current system. Scores ranged from 2.18 (interoperability) to 2.85 (reliability) vs. 2.2 to 2.8 in 2011.
- The steepest declines were reported in interoperability and new features and capabilities. All others areas maintain similar scores over 2011.
- Reliability continues to rate the highest in satisfaction at 2.85 and interoperability ranked lowest at 2.18, below 2011's score of 2.22 followed by new features & capabilities at 2.26. These are key drivers for future purchases.

9. On a scale of 1-5, 1 being excellent, how would you rate your current learning and/or talent management solution?							
Score based up 0-4 point scale, 4 being excellent.	Excellent	Good	Fair	Poor	Very Poor	2012 Grade Card	2011 Grade Card
Feature set	15%	43%	29%	7%	6%	2.54	2.47
Reliability	26%	45%	21%	4%	4%	2.85	2.80
Ease of use	12%	38%	32%	15%	4%	2.41	2.41
Flexibility	11%	36%	34%	13%	6%	2.33	2.28
Cost to operate	19%	38%	29%	8%	6%	2.56	2.52
Quality of service	15%	41%	29%	11%	4%	2.52	2.45
Timely updates	16%	41%	27%	8%	7%	2.49	2.35
New features & capabilities	13%	32%	32%	14%	8%	2.26	2.30
Support of platform	20%	39%	29%	7%	5%	2.62	2.48
Scaleability	24%	35%	27%	11%	4%	2.66	2.50
Overall Value	23%	31%	30%	12%	4%	2.57	2.56
Interoperability	7%	31%	42%	13%	6%	2.18r	2.22

LMS & TMS: Future Buyers

- 18% of respondents do not own a current LMS or TMS.
- Of non-owners, 26% do not track learning or talent assets, down from 37% in 2011, 22% use in-house custom tracking solution (up from 17% in 2011) and 13% use database application (up from 4%) while 22% use a spreadsheet to track learning assets (down from 42% in 2011).
- In 2012, 22% respondents said they owned a Talent Management Systems, up from 16% in 2011. Yet, 41% of respondents are planning to purchase a TMS tripling the size of the installed base.
- 41% of system owners and 61% of LMS/TMS non-owners plan to add, change or replace a LMS or TMS. Of these, 83% plan to purchase a learning or talent system within the next 24 months, 53% will buy within next 12 months, and 17% after 24 months

11. When does your organization plan to implement a new learning or talent management solution?

Within 6 months.	25%
6-12 months	28%
12-24 months.	30%
Over 24 months.	17%
Not in the foreseeable future.	0%

- 96% of future buyers indicated a platform preference for their next LMS or TMS. Cloud/SaaS LMS accounted for 54% of future purchases.
- Important factors to consider when buying a new system changed in 2012. Price still leads but customer service jumped to #2 over quality.
- Drops in importance were also reported for Interoperability (declined 13 points), Open Architecture (declines 4 points) and reputation (declined 5 points). With increased Cloud specification, interoperability becomes less important.
- Awards increased 140% and SCORM Compliance increased 10% in importance for today's buyer.

12. Which factors are most important when specifying a learning or talent management vendor?

	2012	2011
Price	88%	89%
Quality	73%	92%
Award-winning Solution	24%	10%
Customer Service	76%	72%
SCORM Complaint	66%	60%
Open Architecture Complaint	15%	19%
Interoperability	59%	72%
Reputation	27%	33%

LMS & TMS: Future Buyers

- Course tracking (78%), assessment (90%) and web conferencing (88%) repeat as the top MUST features of new LMS/TMS. Buyers are seeking more capabilities including integrated reporting (71%), mobile authoring (68%) and social network tools (49%). New to the list is Cloud/SaaS (44%) systems.
- Talent system buyers are also demanding more features in their future systems. Performance management (46%) and reviews (44%), Skills gap analysis (44%).
- Virtual learning environments (+18), Recruitment/ hiring (+12), Test/assessment (+12) and Cloud/SaaS (+11) saw the largest increases by percentage point change over 2011.

2012 Features of Current LMS & TMS HAVE		2012 Features of New LMS & TMS Must Have	2011 Features of New LMS & TMS Must Have	2012 Trends (# pt. change over 2011)
Applicant tracking system	26%	34%	39%	-5
Authoring	31%	27%	41%	-14
Career development planning	27%	46%	50%	-4
Collaborative authoring	19%	15%	41%	-26
Compensation management	14%	20%	13%	+7
Course tracking and completion	85%	78%	85%	-8
Course marketing and e-mail	33%	41%	52%	-11
Integrated reporting	37%	71%	78%	-7
Mentor/ coaching tool	16%	29%	50%	-21
Mobile authoring and deployment	19%	68%	68%	0
On-demand option	37%	41%	57%	-16
Performance management	35%	46%	39%	+7
Performance review	30%	44%	35%	+9
Rapid development	19%	37%	52%	-15
Recruitment & hiring management	23%	29%	17%	+12
Skills gap analysis	21%	44%	59%	-15
Social network tools	17%	49%	41%	+8
Succession planning	10%	34%	26%	+8
Survey management	31%	51%	80%	-29
Testing & assessments	66%	90%	78%	+12
Web conferencing/Virtual classroom	63%	88%	100%	-12
Workforce planning	8%	24%	11%	+13
eCommerce support for Extended Ent	20%	20%	20%	0
Embedded training in applications	7%	24%	30%	-6
Federated search capabilities	2%	17%	15%	+2
Peer/Website rating tools	10%	22%	35%	-13
Virtual learning environments	29%	39%	57%	+18
SaaS or Cloud computing	30%	44%	33%	+11

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Brands Awareness: All Respondents

- LMS Brands: With continued M&A activity, we see many shifts in brand ownership. The consolidation seems to have created a migration to independent LMS brands with Cornerstone On Demand and NetDimensions benefiting most.
- For the second year, SumTotal Systems leads in brand ownership maintaining 11% share. From there, a lot of shifts have occurred. Saba dropped from 2nd to 5th. Custom solution tied with Skillsoft at 7%. followed closely by Oracle (2nd in 2011) and Cornerstone On Demand (5th in 2011) at 6% share. SuccessFactors, Saba (2nd in 2011), NetDimensions (11th in 2011) and Moodle (10th in 2011) all come in at 5% share. Blackboard, a top 5 brand in the past, dropped to 2% share and shares with NetLearning, Meridian KSI, Operitel and Absorb. (See Appendix 2 for full list.)
- Top of Mind LMS Brand Awareness. Respondents are asked to name the top 3 LMS or TMS brands that come to mind, unprompted. 84% of respondents could name at least one brand of LMS, down from 95% in 2011. (See Appendix 1 & 2 for full list of brands named)

LMS Brands Awareness:

	Unprompted		Prompted		Improvement 2011
	2012	2011	2012	2011	
Saba	34%	43%	57%	71%	+23
Blackboard	31%	27%	64%	71%	+33
SumTotal Systems	24%	40%	32%	65%	+ 8
Oracle/Taleo/LDC	22%	12%	43%	65%	+11
Plateau (SF/SAP)	19%	20%	27%	54%	+ 8
Cornerstone OD	19%	16%	49%	35%	+30
Moodle	18%	15%	65%	66%	+47
SAP	above		28%	47%	
SkillSoft	9%	nr	53%	nr	+44
NetDimensions	4%	2%	15%	12%	+11
Meridian KSI	4%	0.5%	19%	nr	+15

- Moodle (+47 pts), SkillSoft (+47) and Blackboard (+33 pts) lead in Improvement in awareness from unprompted to prompted queries. Saba returned to the top brand (unprompted) followed closely by Blackboard, which edged out SumTotal Systems for 2012. Saba dropped in unprompted awareness, but at a slower rate than SumTotal, which declined 16 points in unprompted awareness in 2012.
- Further consolidation across the LMS category saw significant loss of brand awareness for Taleo, Plateau, and GeoLearning- now marketed under Oracle, SAP and SumTotal Systems. This creates opportunity for independent brands, including NetDimensions, Meridian KSI and others.
- When furnished with a list of LMS brands (prompted), the top brands were Moodle (65%) edging out Blackboard (64%), with Saba (57%) dropping to #3.

Brands Awareness: All Respondents

- Top TMS brands currently owned are: None at 78%. Of owners, top brands owned are: (1) Oracle 26% (vs 2011 with Peoplesoft's 13% and Taleo's 8%); SuccessFactors and In-house/custom built tied at 10%; Cornerstone On Demand and Rypple tied at 5% share. ADP, Workday, Kenexa, Halogen, Meridian KSI, and Silkroad all at 3%.
- In 2012, respondents had to specify a TMS not an LMS in the prompted responses. Some brand rankings suffered from this change in query.
- Unprompted, 67% of respondents could name one or more TMS brands, down from 75% in 2011.
- Consolidated brands did not retain 100% of brand awareness ratings from their acquired brands in 2011 or 2012. EX Oracle & Taleo: If totaled together from 2011 scores, the combined ratings were 80% unprompted and 124% prompted. In 2012, scores were 76%/38% a decline overall for 2012.
- Brands that improved awareness year over year same brands were: Cornerstone On Demand +29 points, and Silkroad +11.

Top TMS Brands Named:

	Unprompted		Prompted		Improvement
	2012	2011	2012	2011	2012
Oracle(Taleo)	76%	41%	38%	59%	+38
Oracle/Peoplesoft	above	39%	52%	65%	above
SuccessFactors	28%	27%	26%	42%	-2
Cornerstone OD	20%	14%	49%	35%	+29
Saba	19%	22%	40%	71%	+21
SumTotal Systems	15%	20%	19%	65%	+4
Halogen	9%	13%	22%	16%	+13
SAP	7%	9%	28%	47%	+21
Silkroad	6%	5%	17%	15%	+11
ADP	4%	nr	23%	nr	+19
Workday	2%	3%	9%	8%	+6
PeopleFluent (Authoria)	2%	nr%	5%	13%	+3
Lawson	2%	1%	15%	19%	+13

Brands Awareness: All Respondents

- Top TMS brands, when prompted, are: Oracle/Peoplesoft (52%), Cornerstone On Demand (49%), SABA (40%), Taleo Talent by Oracle (38%) and SumTotal Systems (32%). All but Cornerstone On Demand and Halogen showed declines in brand awareness since 2011 indicating loss of brand power of acquired assets and continued fragmentation of the market.

23. Which of the following learning or talent management systems are you familiar? (Check all that apply.)	
Moodle	65%
Blackboard Learn	64%
Saba Learning Content Management	57%
Saba Learning Management Suite	57%
SkillSoft SkillPort	53%
Oracle/PeopleSoft	52%
Cornerstone On Demand	49%
Taleo Learn by Oracle	43%
Saba Talent Management Suite	40%
Taleo Talent Management by Oracle	38%
Enterprise Learning by SumTotal Systems	32%
SAP	28%
SuccessFactors Learning	27%
Learning Maestro by SumTotal Systems	26%
SuccessFactors BizX Suite	26%
ADP	23%
Halogen	22%
Talent Portal by SumTotal Systems	19%
LCMS by Kenexa (formerly Outstart LCMS)	19%
Meridian Knowledge Solution	19%
Silkroad	17%
Lawson	15%
NetDimensions	15%
Learning Suite by Kenexa (formerly Outstart)	14%
TEDS	10%
Peopleclick	9%
Workday	9%
ATutor	5%
Peoplefluent (formerly Authoria)	5%
Trellis	5%
Training Partner	5%
Inquisiq	4%
Workscape by ADP	4%
Atlas Pro	2%

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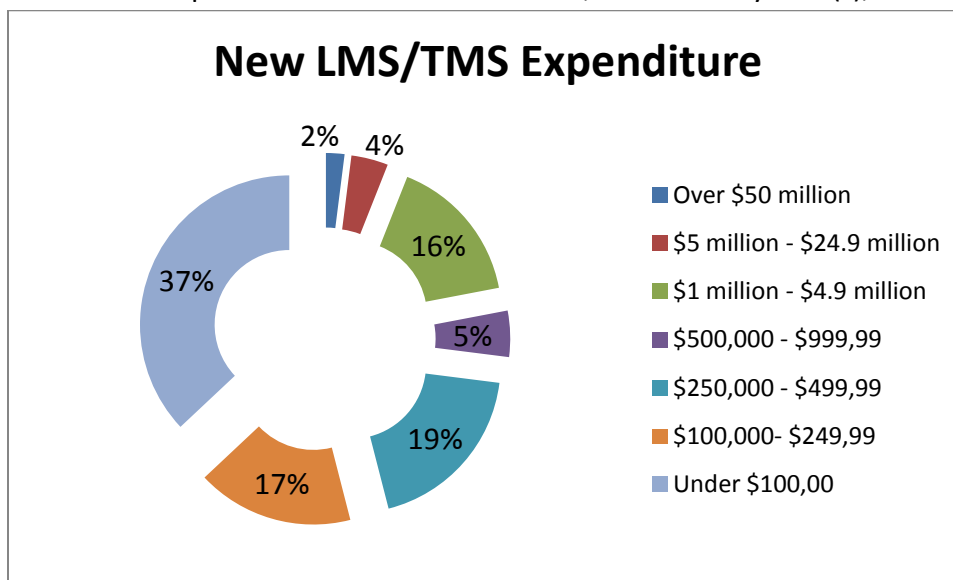
LMS & TMS: Buying Roles

- In 2012, 48% reported chief executives authorize/approve the LMS or TMS purchase, up from 38% in 2011; 28% pointed to the HR/Training/LMS director, manager or VP, down from 48%; IT led 7%, with Operations at 6% and others following at 8%.

22. Who within your organization approves the learning or talent management solution purchase? (Check one)

CEO/CIO/COO/Executive Leadership	28%
Chief Learning/Talent/HR/OD/People Officer	20%
HR/Training/E-learning Director, Manager or VP	28%
IT/IS Director, Manager or VP	7%
Sales/Marketing Director, Manager or VP	1%
Operations/Service/ Program/Project Director, Manager or VP	6%
HR Representative/Trainer	1%
Other, please specify	7%

- Overall, 45% of respondents plan to add, change or replace their LMS/TMS; 41% of current owners and 61% of non-owners.
- Executives expect to invest more than \$439,000 on the system(s), down from 2011's \$590,400



Top 3 LMS/TMS Brands: Unprompted

Appendix 1

17. Which brand(s) of learning talent system(s) are you familiar? (Name three max.)	
Saba	34%
Blackboard	31%
SumTotal	24%
Oracle/Taleo/LDC	22%
Cornerstone On Demand	19%
SAP/SF	19%
Moodle	18%
SkillSoft	9%
Absorb	6%
Meridian	4%
Net Dim	4%
Adobe	3%
Desire2Learn	3%
Coursemill	3%
Healthstream	3%
Cengage Netlearning	3%
Blueapple	3%
Softscape	3%
Cogensys	1%
Certpoint	1%
Crossknowledge	1%
eCampus	1%
Element k	1%
eLogic	1%
Halogen	1%
iLearn	1%
Mzinga	1%
Kenexa	1%
Operitel	1%

17. Which brand(s) of talent system(s) are you familiar? (Name three max.)	
Oracle/Taleo/PeopleSoft	76%
SuccessFactors/Plateau	28%
Cornerstone On Demand	20%
Saba	19%
SumTotal	15%
Halogen	9%
SAP HCM	7%
Kronos	6%
Silkroad	6%
ADP/Workday	6%
BlueApple	4%
Rypple	4%
Enwisen	2%
WebCT	2%
Horizon	2%
Inspire	2%
Kenexa	2%
Lawson	2%
Net Dimensions	2%
People fluent	2%
People stream	2%
TrainingPartner	2%
Trakstar	2%
Wingspan	2%

Appendix 2

LMS Brands Owned:

17. Which vendor supplies your LMS?

SumTotal Systems
(Pathlore/GeoLean)
SkillSoft
Custom/In house
Cornerstone On Demand
Oracle (Taleo Learn)
Moodle
Net Dimensions
Saba
SuccessFactors (Plateau)
Atlas
Absorb
Blackboard
NetLearning
Meredian KSI
Operitel
Rypple
BizLibrary
Blueapple
Blue volt
Syntrio
Training Partner
Inquisiq
Healthstream
Inspired LMS
Mzinga
Peoplefluent
SAP
Xyleme
Expo Impact
Sakai
Opentext
Pathways
Tracorp

TMS Brands Owned:

17. Which vendor supplies your TMS

Oracle (Taleo)
Custom/ In House
SuccessFactors
Cornerstone On Demand
Rypple
ADP (Workday)
Halogen
Expotential Impact
Kenexa
Meridian KSI
Peoplefleunt
Silkroad

Respondents Profile

Appendix 3

Respondents by Industry:

	2012	2011
Corporate	74%	80%
Fin/Banking/Ins/RE/Legal	15%	26%
Retail/Hospitality/Entertainment	11%	13%
Healthcare/Pharma	10%	11%
Manufacturing	7%	10%
Telecom/Cable/TV/Utilities	7%	8%
Computer SW/Web/Svcs	11%	8%
Professional Svcs	6%	3%
Other business svcs	4%	1%
AEC	2%	0
Natural Resources	1%	0
Public Sector	26%	20%
Government/NPO/Military*	17%	13%
Education	9%	7%

Respondents by Job Function:

28. Your Job Function:

Corporate/Agency Leadership	5%
HR/Talent/People	8%
Training/Development/Educator/Teacher	69%
IT/Technology/MIS/Developer	6%
Sales/Marketing/Customer Care	5%
Operations/Finance/Accounting	1%
Program Administration/Analyst	2%
Consultant/Analyst/Otherr	4%

27. Your Job Title:

Chief/President/Owner/Executive Leadership	5	6%
EVP/VP/Director/Officer	18	22%
Manager/Supervisor	22	27%
Non-management	36	44%



Thank You to Sponsor

Saba enables organizations to build a transformative workplace where they can leverage their people networks to become more competitive through innovation, speed, agility, and trust. Hundreds of organizations around the globe are using the Saba People Cloud to build a transformative workplace that can:

- **Accelerate innovation** by tapping into social and mobile capabilities to *engage* and connect employees to the right people, information, and ideas throughout the people network to drive new innovation and faster time to market.
- **Mobilize their people network for speed and agility** to seize new opportunities through complete talent visibility and mobility. The Saba People Cloud provides organizations with visibility into all of the skills, experience, competencies and connections of the people in their people network, the ability to quickly align them to new business initiatives and *inspire* them to greatness.
- **Cultivate a development culture** inside and outside their organization to arm their people network with the knowledge they need, when they need it to excel at their jobs, *develop* in their careers and drive higher performance.
- **Leverage the cloud** with a completely unified, multi-tenant SaaS solution architecture and infrastructure that reduces costs, speeds time to benefit, and provides the flexibility to scale globally and adapt locally to fit your operational and financial needs.

Saba People Cloud customers have already achieved exceptional business results, including:

- Faster time to market for innovative new products
- Increased revenue;
- Faster expansion into new markets;
- More agile integration of mergers and acquisitions;
- Improved customer satisfaction and trust;
- Increased revenues
- Reduced cost and risk.

The Saba People Cloud is different because it is the only solution built to enable a transformative workplace in the networked economy. The key design principles of the Saba People Cloud are:

1. **Enables all People Networks-**
2. **Global and Local-**
3. **Prescriptive**
4. **Always On, Always Accessible-**
5. **Intuitive**
6. **Open & Organic-**

For more information, contact Saba Software:

Saba Software Inc.
2400 Bridge Parkway
Redwood Shores, CA 94065 USA
Tel: +1650.581.2500
Fax: +1 650.581.2581

North American Sales: +1877.SABA101
Latin America Sales: +5255.8000.7279
Europe, Mid East, Africa Sales: +44(0).1344.382950
Asia Pacific Sales: +61.2.8622.7555
Japan, NE Asia Sales: +81.3.5649.1201



About the Authors

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Contact:

B2B Media Company LLC

PO Box 77694

Corona, CA 92877

www.2elearning.com

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888-201-2841