From goat to GOAT N°35

The Licence Is the Visible Part: Building a Learning Platform Budget Around the 70%

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By funding adoption, integration and day-to-day operation as seriously as the licence itself, organizations can put their learning platform budget where research consistently locates value, instead of where it is easiest to see on a quote.

Sooner or later, every learning platform budget lands on a finance director's desk, whether it covers a new contract, a renewal or a mid-year review. It almost always has the same shape: a licence line, an implementation line, sometimes a content line. What it rarely has is a credible line for everything that happens after go-live.

BCG offers a useful lens for reading that document. In "AI Transformation Is a Workforce Transformation" (4 February 2026), the firm writes that, in its case work involving hundreds of companies, about 10% of the value from AI comes from the algorithms themselves, another 20% from the technology required to implement them, and the remaining 70% from rethinking the people component. BCG calls it the 10-20-70 breakdown.

The ratio describes AI programmes, not learning platforms. Yet the logic carries over almost word for word to an LMS, an LXP or a TMS, all of which are becoming AI products in their own right. The software is the visible part. The value sits somewhere else.

What the 70% contains

BCG is precise about what the people component covers: strategic alignment from the top, adoption and behavioural change, an assessment of the impact on positions and skills, and an operating model that combines people and AI, including roles, governance and redesigned workflows. None of these items appear on a vendor quote.

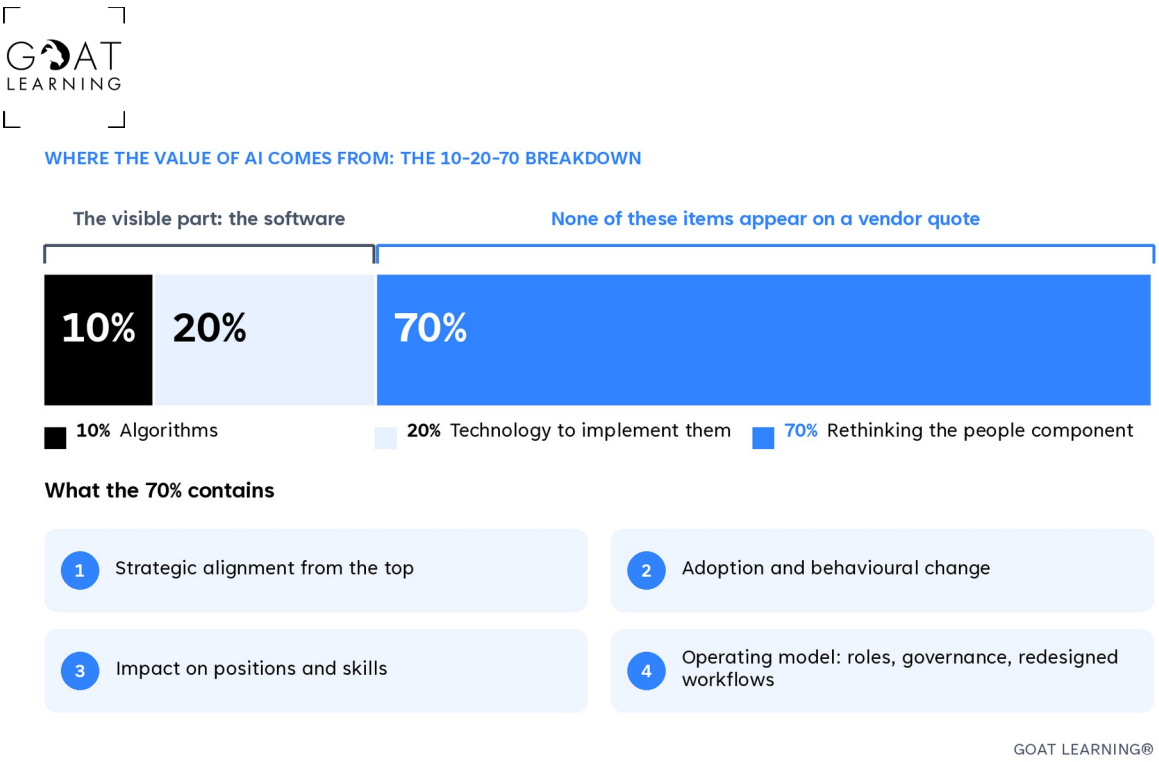


Figure 1. The 10-20-70 breakdown: the software is the visible part of the value. Source: BCG, "AI Transformation Is a Workforce Transformation", 4 February 2026.

The same article describes what the companies it calls future-built do differently. They plan to upskill more than 50% of their employees on AI, compared with 20% for laggards. They are four times more likely to run structured AI-learning programmes and to carve out protected time for employees to learn, and five times more likely to do strategic workforce planning. Among future-built companies, 88% of managers role model AI use in decision making and daily operations, against 25% at laggards.

BCG also reminds us how rare success still is. In its Build for the Future x AI 2025 Global Study, only about 5% of organizations have managed to reap substantial financial gains from AI. Nothing in the article suggests that the difference between those companies and the rest comes down to better algorithms.

Budgets are still built on inputs

The difficulty is that buying habits have not followed. Commenting on its 2026 9-Grid for Digital Learning, Fosway Group observes that the market "remains dominated by seat-based or site-wide licensing", and that customer budgets "are allocated on fixed inputs, limiting their scope to buy in other ways, no matter how much the conversation around value continues". The conversation is about value. The purchase order is about seats.

Gartner adds a view from the boardroom. At its HR Symposium in Orlando on 26 October 2026, it reported that 77% of board members expect AI to deliver productivity and cost savings, yet just 3% of organizations exceed their cost savings goals through productivity, and that almost 40% of companies are over budget on AI. When a technology budget only funds the licence, the overrun usually shows up later under another name: an urgent integration project, a second wave of change management, a support team pulled together in a hurry.

Reading a platform budget differently

When we review a learning platform budget with a client, we look past the licence and ask what the organization has actually planned for three things.

Making the platform work with everything around it comes first. HRIS provisioning, single sign-on, data flows towards talent and skills systems, reporting the business can actually read. This is Intégration. Vendors often price it as a short project, when it is in fact a permanent dependency that moves every time the HRIS, the identity provider or the organization changes.

Making people use it is the second, and the one most often left implicit. Communication, manager enablement, protected learning time, a sponsor who keeps asking for results. This is where BCG's 70% lives, and because most of it is internal time, it tends to vanish from budgets altogether.

Keeping it running in year two and year three is the line most often set to zero. Vendor releases, catalogue hygiene, rights administration, first-level support, data quality. That is Run-Outsourcing territory, and it is funded as if a platform stayed configured on its own.

None of this argues against buying good software. It argues for funding the part of the investment that turns software into capability, and for deciding upfront who owns it. A short Conseil phase ahead of a new contract or a renewal is the cheapest moment to make these costs visible, while they can still be negotiated or planned.

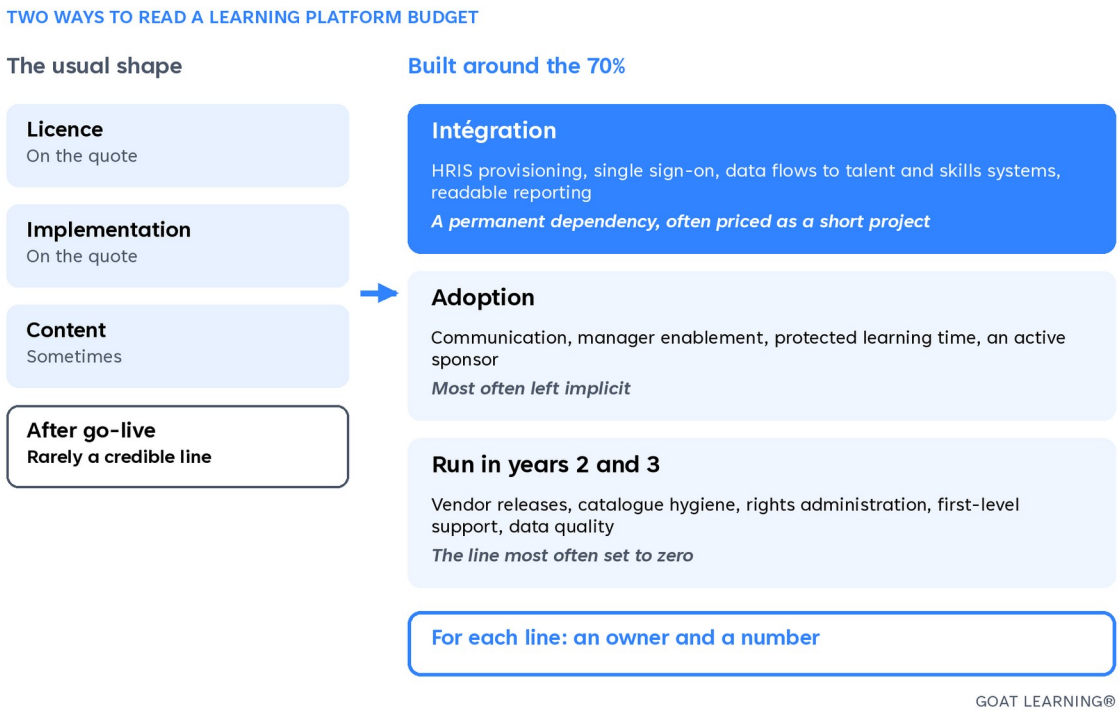


Figure 2. Reading a platform budget through the three lines that follow go-live.

The question to ask at every budget review

PwC's Global Workforce Hopes and Fears Survey 2026 (29 September 2026) points in the same direction. Citing its AI Performance Study, PwC notes that the leading firms are 2.2 times as likely

to redesign workflows to incorporate AI, rather than simply adding AI tools, and 1.7 times as likely to provide ongoing, role-based AI learning. Different firms, different words, same conclusion: the return comes from the work done around the tool.

Whether the next decision is a new contract, a renewal or a mid-year review, the most useful question is not whether the licence price is competitive. It is whether the 70% has a line, an owner and a number.

The licence is what you buy. Adoption, integration and run are what you get.

If you are building, renewing or reviewing a learning platform budget and want to make the full cost of value visible, reach out to us at emilie@goat-learning.com.

GOAT LEARNING® supports organizations in structuring growth and building the skills to sustain it.

About GOAT LEARNING®

GOAT LEARNING® is a consulting, integration and outsourcing firm specialized in EdTech and Learning solutions (LXP/LMS/TMS).

Backed by more than 15 years of experience working with Global 500, CAC40 and SBF120 companies, it supports organizations in the design, selection, deployment and optimization of their learning ecosystems.

Positioned as a Trusted Advisor, GOAT LEARNING® combines technology/IT architecture expertise, a sharp understanding of Learning & Development challenges and a demanding standard of execution to turn learning investments into tangible drivers of upskilling, skills development, learner engagement and sustainable performance.

Leading Skills Based Organization initiatives with its clients, it helps them better align talent strategies, business priorities and learning programs.

With an ecosystem of more than 24 strategic partnerships and 250+ content, technology and service providers, GOAT LEARNING® pursues a simple ambition: to make learning a strategic, measurable asset and a value accelerator for the business.

Sources

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