7 Steps in Selecting an LMS

Choose a solution to best fit your unique needs.

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Introduction

Selecting a learning management system (LMS) requires a solid understanding of the various use cases for training across (and perhaps beyond) the organization, support from multiple stakeholders and deliberate planning.

An LMS selection and its subsequent implementation are best poised for success when the process is closely aligned with the organization's strategy, mission and goals. If you do not have clear understanding of these key items – as well as specific objectives, knowledge of requirements (especially those related to compliance and regulatory demands) and targets to achieve – you are much less likely to select the best LMS solution for your organization.

The right LMS should also contribute to the long-term success of the organization, rather than merely address short-term issues. Be sure to consider not only current needs and requirements, but ways that your organization and its workforce are expected to change in the months and years ahead.

To maximize your workforce, and build exceptional teams who don't just meet, but exceed the expectations of your learners, you need to invest in their development. With the right learning management system in place, you can efficiently and cost effectively deliver learning programs that raise workforce productivity, improve employee retention, aid regulatory compliance, cut expenses and reduce training time. How great would it be to easily train, track and manage the onboarding and ongoing development of any employee or contractor?

Choosing an LMS isn't easy, and we aren't going to pretend that it is. There are a lot of options in the market, and navigating the complexities of commercial or government procurement is not easy. You have many internal stakeholders to please, each with a differing opinion, and selecting an LMS can be a bit scary because it's a significant investment. Let us take some of the mystery and anxiety away by guiding you through the important steps so you can lead the LMS selection project with confidence!

No LMS is all that

At its most basic level, an LMS is designed to centralize learner, training and content administration, and deliver, track and report on training activities. By definition, every LMS should be able to do these things, but each is unique in the way it delivers the features and the depth and breadth of functionality it provides. In addition to the basics listed above, there are numerous other functional

and feature areas, such as content creation, workflow, social, mobile and collaboration tools.

No LMS could possibly provide every feature, or support every internal process that organizations need. Even if such a system did exist, it would be so complex that no one, including the engineers who developed it, could use it. So, LMS vendors focus on being strong in particular functional areas that align with their targeted customers and markets – and place less emphasis on other areas. Your job is to find the vendor whose strengths best match your needs.

Here are 7 Steps to Selecting the Right LMS for Your Organization

1. See the big picture

Mapping your organization's goals and objectives to your training initiatives will provide the foundation for identifying LMS "must have" functionalities. Your goals, initiatives and needs are unique to your agency or department, but here are some important questions to ask before beginning your LMS search:

- What is your organization or agency's primary purpose in acquiring an LMS?

- Will the new system be replacing or augmenting an existing LMS?

- How much budget is allocated to the acquisition, setup, launch and ongoing management of your new LMS?

- What kinds of analytics will you need to show to report on return on investment (ROI)?

- What are the organizational objectives, goals and priorities for the next 1-4 years, and how is learning and development involved? For example, are you mandated to improve customer service, reduce costs, or increase transparency?

- How many learners need to be supported on the LMS? Are the learners predominately internal, external or a combination?

- What is the workforce strategy? Are you reducing headcount due to program or budget cuts? Are your older workers retiring? How are you capturing their knowledge before they walk out the door? Millennials are now the largest segment of the workforce, how are you bringing them on-board and keeping them engaged?

- What are the current training initiatives and programs are in place to support achieving your organizational and workforce objectives?

- Which training initiatives and programs are ongoing? For example, new hire onboarding, compliance or skill development programs. Are there interagency programs that need to be addressed?

- How will you deliver content? Will there be classroom instruction, web-based learning or a combination? Do you need to support a mobile workforce?
- Will the learning and training content need to be provided in multiple languages?
- Will the LMS be used to track skills and competencies within the organization? Will there be a need for individual development plan and gap analysis support development?
- How will you measure success?

2. It takes a diverse, dedicated team

Selecting the right LMS is a collaborative effort, and requires a team of people with a vested interest in the success of the project. Even if you are one of those type A's who wants to do everything yourself – you simply can't do it on your own.

Your selection committee will be integral throughout the project: from defining requirements, to prioritization, to LMS research. Along with a training administrator, the committee should consider including a representative from:

- Human Resources
- Finance, Operations , or Legal/Compliance
- IT
- Representatives from each department or agency using the LMS

3. Listen and learn

Before you can determine what you want your LMS to do, you need to understand and document your current learning strategy, tactics and process. Learn how your colleagues accomplish training related tasks, what processes are in place, which training activities must be tracked and reported on, and the technology, business and operational requirements. Identify what the biggest challenges are, and discover what users can't do now but wish they could in the future.

- **1-1 Interviews:** Start by interviewing each member of your selection committee, and then move on to representatives of functional areas that will be engaging with the LMS. Keep your questions open ended, and focus not only on what they need to do, but why they need to do it. Often the reason why teams need specific functionally will spark a conversation regarding deeper needs that may not have otherwise come up.

- **Shadowing:** Follow your stakeholders and users around while they perform their tasks will give you a more holistic view of your current processes. By understanding the context, your final definition of requirements will be more accurate. It's imperative that you invest time into truly understanding your colleague's roles, responsibilities and challenges.

- **Create scenarios:** Using the information you collected during your meetings, develop use case scenarios, or stories, that describe the functions that must be carried out to facilitate learning.

4. Analyze and categorize

You met with the right people, asked them the right questions, and saw them in action – now it's time to translate all that information into a list of LMS requirements. When writing your requirements, follow the advice given in by Steve Forman in Learning Solutions Magazine:

> Each requirement should express a need, not a solution. Each requirement should be discrete, without repeating or overlapping other requirements, and you should write it at the same broad-based level of detail. [1]

Your requirements document should list the discrete LMS functions necessary to carry out each scenario, execute your learning strategy and support your internal process. To make it easier to manage, break your requirements into the following three categories.

- **Functional:** Functional requirements describe what the system needs to do.
  For example: The learner must be able to view and take courses on a mobile device
- **Technical:** Technical requirements come from your IT stakeholder.

  Examples include: What are the deployment, firewall and security options? - Does the LMS need to sit behind a firewall? Is it available on-premise or in a Private Cloud? - Does the LMS need to integrate with different technologies? - Does the LMS need to support certain standards? For example, "LMS must support SCORM 1.2 and xAPI."

- **Operational:** Operational requirements describe how the system should run, including security, scalability and service level agreements.

  For example: "The LMS will be available to all users seven days a week, 24 hours per day." - "Level 1 technical support issues must be acknowledged within one hour of submission."

[1] "Learning Solutions Magazine, "Five Steps to Evaluate and Select an LMS: Proven Practices," 2013

5. Must have, want to have, nice to have

Congratulations, after all that hard work you now have your requirements list! In a perfect world, you could take your long list of requirements and find an exact LMS match, that not only included on your list, but it was within your budget. Sorry to break the bad news, but that is not going to happen. However, you will be able to find an LMS that meets your critical and most important requirements. To determine which requirements those are, you need to work with your selection committee to prioritize the list. The first thing you'll notice when going through this exercise is that at first everyone thinks their requirement is critical, so you must do your best to be an objective arbiter.

Create a priority scale that works for you. It can be as simple as "1, 2, 3, 4," or more descriptive, like "show stopper, must have, like to have, nice to have."

When determining the priority level of a requirement, here are some things to keep in mind:

- Does it map directly to an agency or training goal?
- How often is it used (daily, weekly, yearly), and how many stakeholders does it impact?
- Is it "mission critical," and without it will users be unable to accomplish important tasks?
- For example, a process is halted, or a mandatory regulation goes unmet?
- Is there another, equally effective way to accomplish the same thing?
- If the functionality isn't available, what are the risks to the organization?

6. Narrow the field

There is no shortage of learning management systems on the market. Bersin by Deloitte monitors and tracks over 500 LMS vendors from around the world.[2] Narrow the field to 3-5 LMSs that will provide your "show stopper" requirements.

7. Evaluate and rate

Now that you have an easy to manage list of 3-5 vendors, you can get down to the details of what each offers and select the LMS that is right for you. Evaluate each system by working directly with vendor representatives, using your prioritized requirement list and collaborating with your selection committee.

[2] Forbes, "The Red Hot Market for Learning Management Systems," Bersin, 2014

- **Create a Request for Proposal (RFP)** - Many vendors provide RFP templates that you can use, but these should be looked at as a framework. Most of the time, the RFP will focus on the strengths and features of their LMS. Use your requirements list to create an RFP based on your needs, not just what the vendor wants you to need.

- **Develop an internal evaluation criteria and scoring system** - Organize your requirements into logical categories and develop a scoring system so you can rate how well each LMS meets each requirement. Distribute these to your selection committee and make sure each is clear on the scoring system criteria.

- **Setup a detailed demo with each vendor** - Based on the RFP responses, you will most likely narrow the selection down further. Contact the selected vendors, set a date for a demo, send them your use case scenarios ahead of time and invite the selection committee to the demos. Ask the vendor to demonstrate how their system will support your scenarios, and use your evaluation criteria to rate performance. A skilled demo expert will steer the demo to highlight what their product excels at, which you want to see because there are going to be great features that you may not have even thought of, but you also must be sure that your scenarios are demonstrated.

- **Speak to references** - It's no secret that organizations face more hurdles than ever before when selecting new technologies to implement. Speaking to the vendor's customer references is arguably the most important step in selecting the right LMS. You need to talk to a reference that understands your needs. Create a list of questions that cover topics like: why they chose this LMS; how well the system handles your most important requirements; their experience with implementation, integration and the quality of support. And perhaps, most importantly, would they choose this LMS again?

Following the above steps will lead you to the LMS that is right for your organization. Be confident in your choice! Choosing an LMS is not easy and it takes a lot of effort, collaboration and sometimes a little gut instinct based on your expertise. Choosing the right solution is one of the most important decisions you will make as a learning professional.

Bonus step #8 - and this one is just for you.

Take a moment to give yourself a pat on the back and a reward for a job well done. You've worked hard to choose the solution that will help your organization achieve its goals and your employees to improve their skills and advance their careers.

Helpful bonus tip: One of the best ways to find the information you need is by attending government-focused learning events, such as the annual ATD Tradeshow & Expo, or other conferences. By attending these events, you have the opportunity to meet one-on-one with vendors, see product demos and hear success stories and recommendations.

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