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Learning**

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## **Learning Management System Selection**

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### **Why Choose a Learning Management System?**

Do you need a Learning Management System at all? When you are making this decision you should consider these questions:

- Is the flow of information mission-critical to your organization?
- Do you use Customer Relationship Management (CRM), Enterprise Resource Planning (ERP), Point of Sale (POS) and/or Business Intelligence (BI) systems, or some combination of these — all tailored to your business?
- How do you ensure that your employees, contractors, vendors, partners and clients not only are aware of the tools and information necessary to run your business, but also effectively use the tools, and absorb and apply that knowledge?

These systems, processes, and interactions are highly complex, and your bottom line depends upon their users and participants knowing how to leverage them to best effect. Your top line depends upon keeping your sales force constantly up to date on the latest sales techniques, priorities, and products. And it is likely that the way your organization goes about its daily activities has a material effect upon your exposure to liability — be it through the handling of intellectual property or compliance to regulations.

Leading companies, from Fortune 500 down to mid-size firms, have come to learn that the most cost-effective way is not to leave users of complex systems and processes to their own devices, but to continuously and in a targeted way train those who use these mission-critical tools in how to use them. And they have learned that the most effective way to implement and manage that training is through the use of a Learning Management System.

### **Learning Management System Overview**

A Learning Management System (LMS) is an enterprise application that hosts, delivers, tracks, and reports on training activities — from Instructor Lead Training sessions (ILTs), “asynchronous” on-line training, “synchronous” on-line learning classes or events, and others. LMS’s may also utilize leading-edge Web 2.0 technology such as blogs, Wikis, or chat forums. They typically adhere to



industry standard Application Programming Interfaces (API's) and integrate into many existing enterprise systems. Different Learning Management Systems often cater to different market sectors and needs. Your business requirements, and thus your training strategy, will determine the type of LMS that best fits your organization.

## **LMS Selection**

The selection of an LMS is one of the most significant choices that affect an organization's training strategy. The LMS provides the central location for all training materials and supporting documents, and its design and implementation strategy can largely or wholly determine the experiences that employees and clients will have in regard to training.

For learners, the LMS is the hub **through which** they access ILT session information (scheduling, locations, required materials), synchronous learning classes (WebEx and Live Meeting sessions) and asynchronous learning activities (e.g., Captivate, Articulate, HTML-based, and other online courses). They will be able to access certificates of recommended and required courseware and see the progress that they are making on their training requirements.

For administrators, managers, and training coordinators, the LMS provides a central location to **organize and control access to content, efficiently prescribe instruction, and** provide detailed information about the training status of their employees and clients. **The LMS's reporting features** provide tools to ensure accountability and auditing capabilities.

Because of the complexity inherent in simultaneously meeting such a diverse set of requirements (from users, administrators, managers, and trainers in different departments with different needs), the selection of an LMS is a complicated process that can take months and require expertise that is often not readily available internally. The investment in these systems is thus significant in cost and time, over and above its sticker price. A poorly chosen LMS can have significant negative repercussions on business objectives. Therefore, it is important to select and implement the LMS that best integrates into your current environment, but also provides you with the flexibility to strategically drive learning and development as the organization grows.



## Stages of LMS Selection

To select the optimal LMS, it is often easiest to break the selection process into several stages. These stages are not completely distinct, but provide a convenient conceptual structure and work breakdown for planning the selection process.

These stages are:

1. Establishing the Business Goals
2. Creating the Request For Proposal (RFP)
3. Vendor Proposal Reviews and Vendor Presentations
4. Final Vendor Selection

### Establishing the Business Goals

As with any investment, selection and implementation of an LMS should further an organization's specific business goals. These goals can be strategic and/or tactical in nature, and can be either short- or long-term, or both. The business goals form the foundation of the Request For Proposal requirements and the basis for LMS selection. Well defined and agreed-upon business goals will provide a clear framework and mandate not only for the LMS selection but for implementation and deployment. Ill-defined business goals will make it difficult to successfully select the optimal LMS.

Establishing these business goals is an opportunity for all the stakeholders to gather and identify not only current difficulties the LMS can and should solve, but what strategic role the LMS can play in driving the organization's growth. Throughout these discussions, specific LMS requirements should be considered. Specific questions that will need to be answered include:

- What is the timeline for implementing the LMS?
- Are there systems that the LMS will replace?
- Are there legacy training data that will need to be ported/transferred into the new LMS?
- Are there systems that will need to integrate with the LMS (HR systems, email programs, LCMS, synchronous tools, etc)
- Are there any Web 2.0 requirements, such as blogs, Wikis, or chat forums?



- Are there ILT requirements?
- Who are the users that will use this LMS? Are they internal employees or external clients; or both?
- How, and from where will users access on-line instruction? Are there bandwidth restrictions on the end-user population?
- Is domain-like functionality required?
- What kind of content security is appropriate?
- Are there compliance requirements, such as Section 508 or CFR Part 11 compliance?
- Are there localization requirements?
- What type of relationship do you want with the LMS vendor?
- What will the future requirements be?

In addition to identifying stakeholders and establishing the business goals, it is important to select a team that will drive the selection of the LMS. If there are numerous stakeholders, establishing a smaller, representative team to perform the majority of the selection process may be beneficial. It is easier and quicker to set up meetings and gain consensus among a smaller team for RFP creation and vendor reviews. It is important that all stakeholders have some involvement in the final selection of the LMS vendor, as this will facilitate enterprise-wide adoption and “buy-in”; however, it is equally important that there are not so many people involved in the details of every step that it slows down the process.

## **Creating the Request for Proposal (RFP)**

Once the business goals and the criteria for success have been determined, the request for proposal (RFP) must be created. This will be the primary way to communicate your business goals to the each LMS vendor, and describe how you would utilize their system and services. A poorly drafted RFP will make it difficult to score and differentiate LMS vendors, and may result in vendors failing to address important business goals simply because they were not aware of them or their importance. One of the most effective tools in creating an effective RFP is the Score Card.

Score Cards offer an analytical structure in which to review different LMS vendors, and provide a method to validate the decisions taken by the selection team. Having clearly established how the organization will measure the LMS vendors and their offerings, those writing the RFP can include specific questions that require and enable responding vendors to frame their proposals in such a



way that they can be scored; and in doing so, prove that they can meet the defined business objectives.

Once the RFP is created, you must get vendors to respond. If viable LMS vendors do not create proposals for your RFP, you will have difficulty finding a solution that will achieve your business goals. It is important to make sure that viable LMS vendor candidates receive the RFP and are provided with responses to any questions that they may have.

It is customary to hold LMS vendor meetings, in order to provide answers to any questions they might have regarding the RFP. This allows LMS vendors to clarify their understanding of your requirements, and guarantee that you are getting the most accurate solutions to your business goals. In order to ensure this – and in keeping with fair business practices – all vendors must have access to your answers to clarifying RFP questions from each vendor.

## **Vendor Proposal Reviews and Vendor Presentations**

Once the LMS vendors have finished submitting their proposals, the selection team will need to review them. There are a variety of ways to review these proposals, but an effective technique is to have extended group reviews of each proposal and create scores for each LMS vendor based on how well each proposal meets the requirements delineated on the Score Card. The goal of these reviews should be to reduce the proposals to a shortlist of vendors that will be invited to give final presentations. Performing these reviews with the larger selection group will ensure that everyone agrees upon the shortlist for the vendor presentations.

The Vendor Presentations will usually be the only opportunity that your organization will have to see the different Learning Management Systems in action. These presentations should be used to examine the functionality of the candidate systems and to further rank the vendors. Thus the criteria used at the presentations must guarantee that outstanding questions are answered, common LMS activities are demonstrated, difficult external tool integration solutions are explained, and the vendors provide any other information that is relevant to your decision. Creating a new Score Card based upon these criteria, along with any other issues that arose during the first-round analysis of the vendor proposals, can ease the review and ranking of the shortlisted vendor(s) during the presentation phase.



## **Final Vendor Selections**

After these vendor presentations, the appropriate LMS vendors should be in a position to create finalized pricing estimates for the implementation and licensing of the LMS. Proposals may contain pricing estimates, but these estimates should be validated and updated to reflect any changes that may have arisen during the vendor presentations.

Based upon the final presentations and price estimates, the selection team can choose an LMS that will best meet the organization's business goals. The selection team should then present this recommended LMS vendor and solution, along with the results of the proposal and presentation scoring, to the stakeholders for final approval. If business objectives were defined up front with stakeholders, this step should be pro forma; but in any event it will allow the selection team to address any concerns the stakeholders may have, and will set the stage for the smooth implementation and deployment of the LMS.

## **How Convergent Learning Can Help**

Convergent Learning has experience with all aspects of the LMS selection process and can work with you to ensure that you find an LMS that will both your current and future needs. Depending upon your requirements, we can take on more or less of each stage of the selection process, from facilitating stakeholder and selection team meetings, to creating Score Cards, setting up vendor presentations, and writing final recommendation reports.

If you are new to this process or do not have the available resources to perform these tasks, we have complete and comprehensive solutions that walk you through this entire process. If you only require assistance with certain portions of the selection process, we can craft a targeted solution to support your specific requirements.

We have experienced project managers to help manage the selection process and LMS experts with extensive LMS technical knowledge and experience. Utilizing both these skill sets, we can craft a solution that is appropriate to your.

For more information please contact us at [contact@convergentlearning.com](mailto:contact@convergentlearning.com). For more information you can visit our website at <http://www.convergentlearning.com>.