A City & Guilds Group Business

LMS Planning and implementation

A complete guide

Seven steps to LMS success

Whether you're implementing an LMS for the first time or performing a major upgrade to a current solution, getting to success can mean a significant investment in time, cost and resource and create a period of potential disruption to your learning. So you want to make it worthwhile, right?

A map for your LMS journey

In this guide, we've laid out the seven steps that we've found, through our years of being platform partners with global organsiations, really work. From proper preparation, to drafting a killer RFP and getting the most from demos, we've outlined a route to get you from A to B in the fastest and most effective fashion.

Like any major decision, a clear understanding of your needs is critical to a successful outcome. You don't want the picture to get muddled with "nice-to-haves." The thoughts and questions that follow are intended to help you start documenting and prioritizing your organization's requirements.

1. Preparation

You know what they say - proper planning and preparation prevents, er, let's say sub-par performance. Considering these factors will help set you up for success from the start.

Have a champion

Every project needs a champion, and your LMS project is no different. The champion may very well be the person reading this guide. The champion:

- Clearly sees the need for an LMS
- Can clearly verbalize the need for an LMS and the benefits of implementing one
- Can serve as the voice of the project to management and stakeholders
- Understands the learning needs of your company at a high level
- Can work to bring consensus within the LMS selection group
- Has the backing of management, who controls the budget

Who is your champion?

Stakeholder team

The champion can't do it alone, and will need to find a team of fully engaged stakeholders to help define requirements, select a vendor, and serve as LMS evangelists.

Identify your group of stakeholders early. You should include one stakeholder from each line of business that will use the LMS, as well as someone from IT, HRIS, and procurement; having these groups on your team now will save time later! Be careful, though, of making your stakeholder team too large; try to find the sweet spot where all the major lines of business are represented but you can efficiently reach consensus. Under 10, for sure; under five, if possible.

A stakeholder should:

- Be able to commit to spending the time needed for the LMS selection process
- Be familiar with the learning needs of his or her line of business
- Believe in the goals of the LMS procurement process
- Be able to serve as liaison between the LMS selection team and their business unit
- Be able to make decisions on behalf of his or her business unit
- Be engaged in the process

Who are your stakeholders, and what line(s) of business do they represent? The following questions are intended to guide you through a capability analysis of you and your team.

Stakeholder	Line(s) of business

Kineo insight

Don't forget the learner experience – it's for them

It sounds obvious - especially if you go through the use case exercise we outline later - but your learners are your most important stakeholders. It's common in our experience to receive a long list of LMS requirements that are all about administration and back-end functionality and not much about the user experience.

Capability analysis

So now we need to think about other kinds of services you may need. You need to know your prioritized requirements, but you don't have to be an expert in LMS – you can purchase the level of support you need, typically from your LMS vendor. Once again, think about your important needs. What services do you need to help you through this process and be delighted at the outcome?

You'll need to conduct an honest analysis of you and your team's abilities to implement and administer an LMS. If there is a gap in capabilities, that will guide your vendor selection; you may need a vendor that will be willing to give you more hand holding through the process.

How familiar are you with LMS systems?	
Do you have experience implementing an LMS?	
Do you have IT support for an installed solution? Or will a hosted solution be better for your needs?	
Do you have instructional designers and create courses internally? Or do you use courses from a courseware vendor?	
Do you want or need to use web services for live data integration?	

What is your budget and timeframe?

What is your budget for the LMS? Is there a separate budget for implementation and for ongoing yearly costs?

2. Define your customers

Who are your customers?

If you've been tasked with selecting an LMS for your organization, it's probably a good idea to think of the internal groups whose needs you'll be meeting, with the LMS as your customers. Like it or not, you'll be judged by them that way.

List the departments, such as T&D, HR, Sales, Legal, etc., that will be deploying training through the LMS:

Customer analysis

Now that you've identified your customers, let's take a closer look at the training they do and how that will influence your LMS selection. Let's take a look at your top 3 customers (of course you can do more). Fill out the tables on the following pages, one for each customer.

Client name	
Primary Audience(s): (e.g. all employees, sales, CSRs, customers, etc.)	
Size of the Audience:	
What are their major training initiatives? (E.g. Onboarding, Annual Compliance, Management Development, product knowledge, etc.)	

For at least two of the initiatives listed above, document some details:

Name of the initiative:		
What mediums does the training include? eLearning, ILT, Discussion Forums, Documents, etc.?		
Is the same content assigned to all employees, or do different groups receive different elements (segmentation)? If so, describe:		
What are the triggers for training? On what devices will learners access the training? Desktop? Tablet? Phones?		
Are there deadlines? If so, what are they? Are there interim deadlines?		
Is communication with the learners required? i.e., Notification of enrollment? Of past due?		
What reports are required for the initiative? • What data is required? • Who needs to get it? • How does it need to be? segmented?		

Integration analysis

You'll have other needs besides your customers'. You also need to decide how your LMS will get user information. Consider how often user information changes and how important those changes are to learning assignments.

If you hire many people each week and update a user's job information often, you may need real-time integration. But if you hire only a handful of users a month and your staff is stable, you may be able to manage manual updates or flat files uploaded weekly or monthly. You may also decide that, although user information often changes, those changes do not affect assigned learning.

Where does data come from? What data do you need? Sometimes, the data you need won't be where you think it is. If you aren't talking to the owners of these systems already, you should be. Cross charges can be an unexpected cost in your implementation.	
Where does data need to go? What data do you want to send?	
If integration is needed, define the integration parameters: • Do user updates need to be real-time? • Can you upload a flat file on a regular basis, such as weekly or monthly?	
If real-time integration is needed, do you have internal capabilities to code web services or something similar?	

3. Prioritize

You're probably starting to get the picture that all needs aren't the same across the organization. Unless you're prepared to invest in a solution that has multiple configuration and user experience options, you'll need to make some tough choices. Take a stab at listing the training initiatives you documented above in order of importance for the organization and your LMS selection process.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

4. Use case scenarios

You've started to make some of the tough decisions that are required. Things should be starting to come into focus. How does it feel?

Now we're ready for some details. Think about the "actors" for you most important initiatives. Actors are all of the group that will be involved with a training initiative. What will a learner need to do? A trainer? A supervisor? An LMS admin? A manager? Tell a simple story for each, targeting the prioritized needs you identified above.

Tell a simple story for each, targeting the prioritized needs you identified above.

Use Case:	
Who are the actors?	

Tell a simple story for each, targeting the prioritized needs you identified above.

Actor 1	
Actor 2	
Actor 3	
Actor 4	
Actor 5	

What specific actions will the actors expect from the LMS?

Actor 1	
Actor 2	
Actor 3	
Actor 4	
Actor 5	

What is the actor's definition of success in performing this task?

Actor 1	
Actor 2	
Actor 3	
Actor 4	
Actor 5	

5. Translate into requirements

Now that you've identified your top priorities and explained them in use cases, it should be fairly simple to convert that to a list of requirements.

Many LMS customers ask for everything they can think of that they may use in the future. Be careful of this kind of scope creep. Remember the 80/20 rule: Take care of 80% of the needs and then see how successfully you can fulfill the needs of the remaining 20%. You've identified your priorities; now, reflect those priorities in your LMS requirements list. Mark anything that's not in your list of priorities as "nice to have" or "for future use."

80/20

Remember the 80/20 rule: Take care of 80% of the needs and then see how successfully you can fulfill the needs of the remaining 20%.

Kineo insight

Open source – 5 reasons why you should consider it

The LMS market splits into proprietary and open source solutions. The major growth in the LMS market has been through the open source solutions. We're pro open source. Here are 5 good reasons why you should be, too.

1.

Cost

The cost of ownership of or ability to use open source software is generally significantly lower than using proprietary alternatives. This is based on the simple fact that it is legally not possible to sell an open source product or charge license fees. Proprietary solutions that charge per user, per annum can quickly become prohibitively expensive on large installations. However, using open source is not completely 'free'—as there are costs for installing and software maintenance, and, in some cases, subscriptions or service fees.

2.

Vendor independence

With a proprietary system, you have vendor lock-in. And if that vendor gets bought or goes out of business, you may find yourself with a legacy, unsupported LMS. With open source, clients have access to the source code and can switch providers or maintain installations using internal staff. Of course, you need to consider if you can/want to maintain it in-house and also how many other vendors support the open source LMS. Generally, potential users should seek out mature open source products and communities. Open source projects which have commercial aspects and/or multiple providers are generally a good choice if vendor independence is a key consideration.

3.

Ability to enhance/configure

Spoiler alert on your LMS decision: It's unlikely you'll get all of your requirements met straight out of the box. So it's a question of where you can compromise and where the vendor can customize. Typically, this is more possible with an open source solution than with a proprietary LMS. Proprietary systems are built as products with limited configuration options. Open source products can be changed to accommodate specific requirements and processes. These changes can be made by developers of the core product or third parties, including professional service providers. This includes the all important look and feel.

4.

Benefits from community contributions

Open source solutions have a wider community of contributors than proprietary systems have. With open source, as extensions and enhancements are created and contributed back to the core team, the code will be vetted and, where suitable, incorporated into the core product. As a result, the feature set of the open source product grows. Often, features which were funded or contributed by one party are embraced and further improved by other parties. You should ask to see the roadmap for any open source product so you can see what functionality is in development.

5.

Competition in the marketplace

Generally, the open source marketplace is more open for competition to develop. This usually only happens for mature products, especially those with commercial providers. Competition has a positive effect on the quality of service and rates/prices providers will charge. Totara, for example, has over 40 partners who differentiate on service and ability to customize. We'd recommend you specifically consider open source as a part of your decision making. Organizations like Tesco, Nikon, UK Government, the CIA and Ministry of Defence have embraced open source—so you'll be in excellent company.

6. Create Your RFP

Now you can use your use case scenarios and requirements list to easily create your RFP. Many of the RFPs we receive are a laundry list of requirements with little or no context. We'd actually prefer to know your story, and you deserve to receive responses in the context of your story so they're truly useful to you in making your final decision. Tell your story: These are my key customers and this is the experience I want them to have.

Don't get too tied up in traditional RFP formats; the RFP is yours, and you have the right to ask vendors to respond in the way that's most useful to you.

So here is a list of things to consider:

Create your RFP by listing your use case scenarios and accompanying requirements.
Feel empowered to ask your vendors to use these use cases as their script for their demo. They may push back, because they have their own scripts they use that show all the best bells and whistles in their platform. Give vendors time and space to show you bells and whistles, but only after they have shown you how their system will fulfill your use cases.

Add your requirements list, with your priority requirements front and center.
This will help weed out any vendors who cannot take care of your priority needs. Again, be careful of using "required" if it's really not – be sure to use "future need!"

Be open about any challenges you think you will face in your LMS implementation and any help you may need from your Capability Analysis.
If you're open about challenges, you may find that vendors share their experience and expertise to give you ideas to help, even in this early phase. You'll also be able to identify those vendors who will or will not be able to give you the support you need.

Be clear about your schedule and the events driving it.
A vendor may be able to fulfill your initial requirements in a phased rollout.

Kineo insight

A conversation is better than a spreadsheet – avoid setting the requirements exam

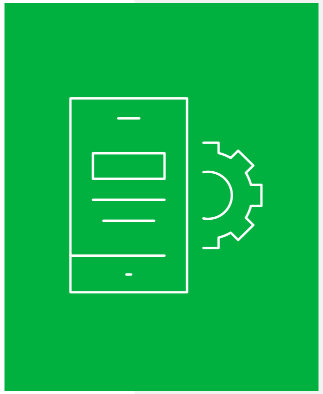
If you can bear to hear it from the vendor perspective, we often receive long lists of LMS requirements, and we're asked to respond line by line to those requirements.

For a mature LMS buyer or where a replacement of an existing LMS is required, that's usually a good way to do it. But sometimes, it's not really clear what the requirement is meant to achieve as a business result or whether it's really important or just a nice to have.

In our view, it's always better to have a dialogue about what you want to achieve with your LMS and 'tell your story.' Vendors can learn more directly about your specific needs and consult with you to help propose the right solution. Being open about budgets and timelines isn't a 'giveaway'—it enables a more honest conversation earlier in the process.

It's perfectly fine to start a project with some of the requirements not fully defined—we'd expect that, and you should too. It's often only as a project matures that the full requirements become clear. To help out those of you who may be very clear on your needs, feel free to include that long requirements list—but we'd really always welcome and recommend a discussion rather than having you procure an LMS via a spreadsheet. It's worth more than that.

7. The Vendor Demos



Managing the Vendor Demos

Now you're on to scheduling demos. You should plan four hours for each demo – that's a typical length.

During the demo, you'll be scoring how well the LMS fits your requirements (see more about that below), but you should also try to judge how well the personality of the vendor fits with your own company and team. How does the vendor respond to questions and your requests for specifics? How willing are they to think outside the box? How receptive are they to your participation and how excited (or not) do they get when you are proactive? Are you looking for a vendor that serves as simply a provider of services, or are you looking for a partnership?

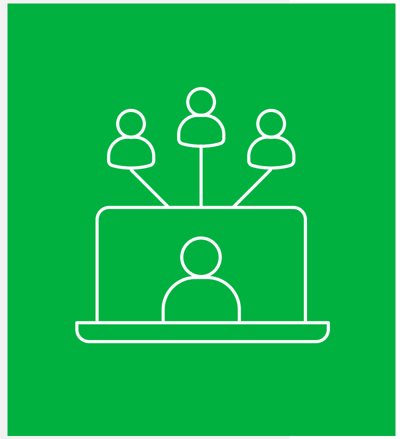
Don't be afraid to push the vendors to get the answers you need. The vendor and your relationship with them will be the key to a successful outcome. Remember, you're the client!

Make a Scoring Sheet

You'll want all your team members to score each LMS. It's easy to convert your list of requirements to a scoring sheet. Add columns to score each requirement on a scale – the scale is up to you. Consider the personalities in your team. If you use a scale from 1 to 10, will your team members agonize over whether a certain score is a 4 or a 5? If so, you may want to use a simpler scale, such as from 1 to 3. For some clients, a simple Yes or No is the best way to score.

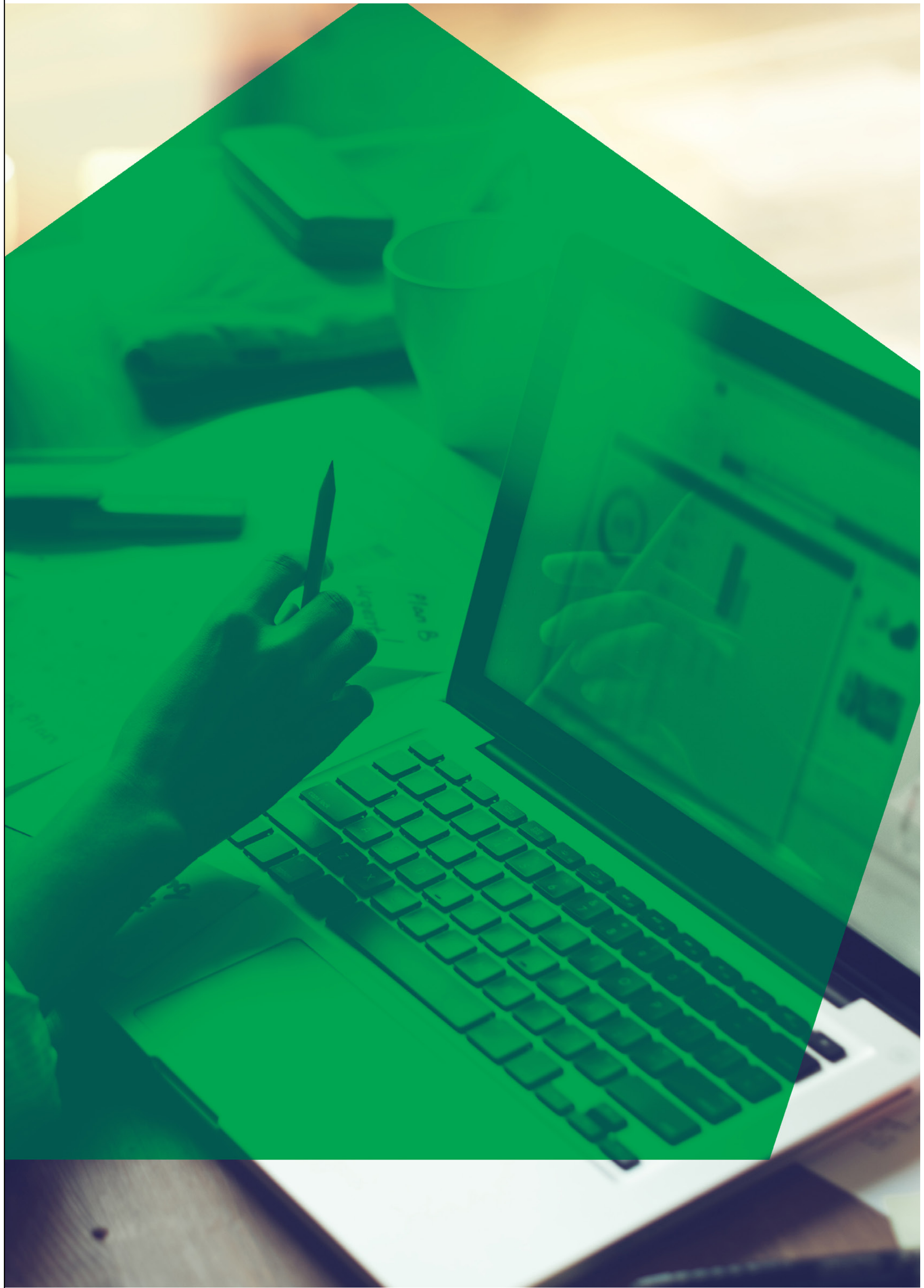
After the Demo

If you scheduled more than 3 demos, now you should be able to narrow down the list to the final 2 or 3 top vendors. Each vendor should be able to give you logins to a sandbox where you and your team can get some hands-on experience in their LMS. Each of your stakeholders should log into the LMS sandbox and walk through their top 1 or 2 use cases. This should lead to a discussion of the feel of the LMS. Which system gives you the functionality you need with a simple, easily understood interface? Which system will best reflect your needs, personality, and goals?



Decisions

Now your decision should be clear. Documenting your top requirements and use cases, keeping your goals clearly in mind, and assessing how well each vendor fits your needs should lead you to making the right choice. Don't get too tied up in traditional RFP formats; the RFP is yours, and you have the right to ask vendors to respond in the way that's most useful to you.



Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

Whatever your business challenge, we will partner with you every step of the way to find the learning solution that fits best – and delivers results.

**So, how can we help you?
Get in touch about your digital learning challenges.**

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