

# LMS Selection

## *Mastering the Process, Avoiding the Pitfalls*

*presented for Association TRENDS*

*by Jeff Cobb & Celisa Steele, co-founders  
of Tagoras and Leading Learning*



# LMS *noun*

: acronym for *learning management system*; software application or Web-based technology used to administer and deliver learning activities.

# Traditional functionality

- Enrollment
- Launching courses
- Tracking of activity, scores, and completion
- Basic testing
- Reports

What does an LMS *do*?

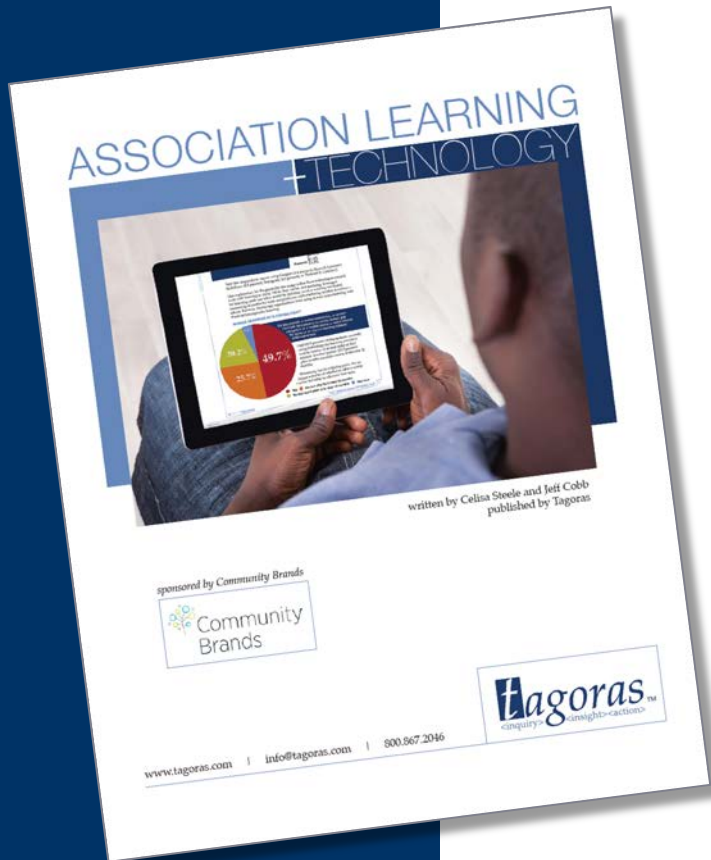
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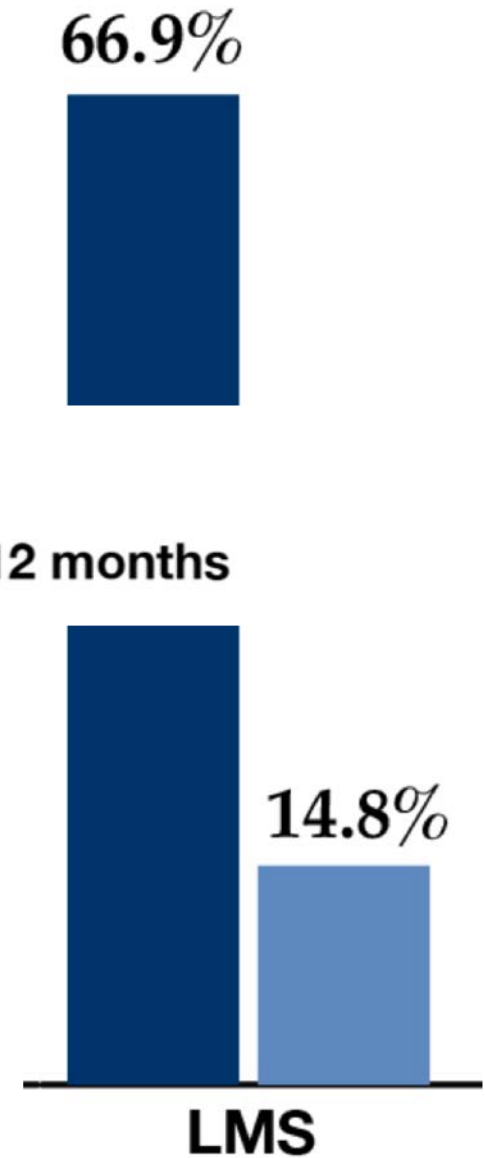
## Optional functionality

- Content authoring
- Webinar capabilities
- Classroom management
- Collaboration and social tools
- Sophisticated assessment
- Credit and credential management
- E-commerce
- Integration (e.g., with AMS, CRM, E-mail marketing)

What does an LMS *do*?



- Currently offering**
- Planned for next 12 months**




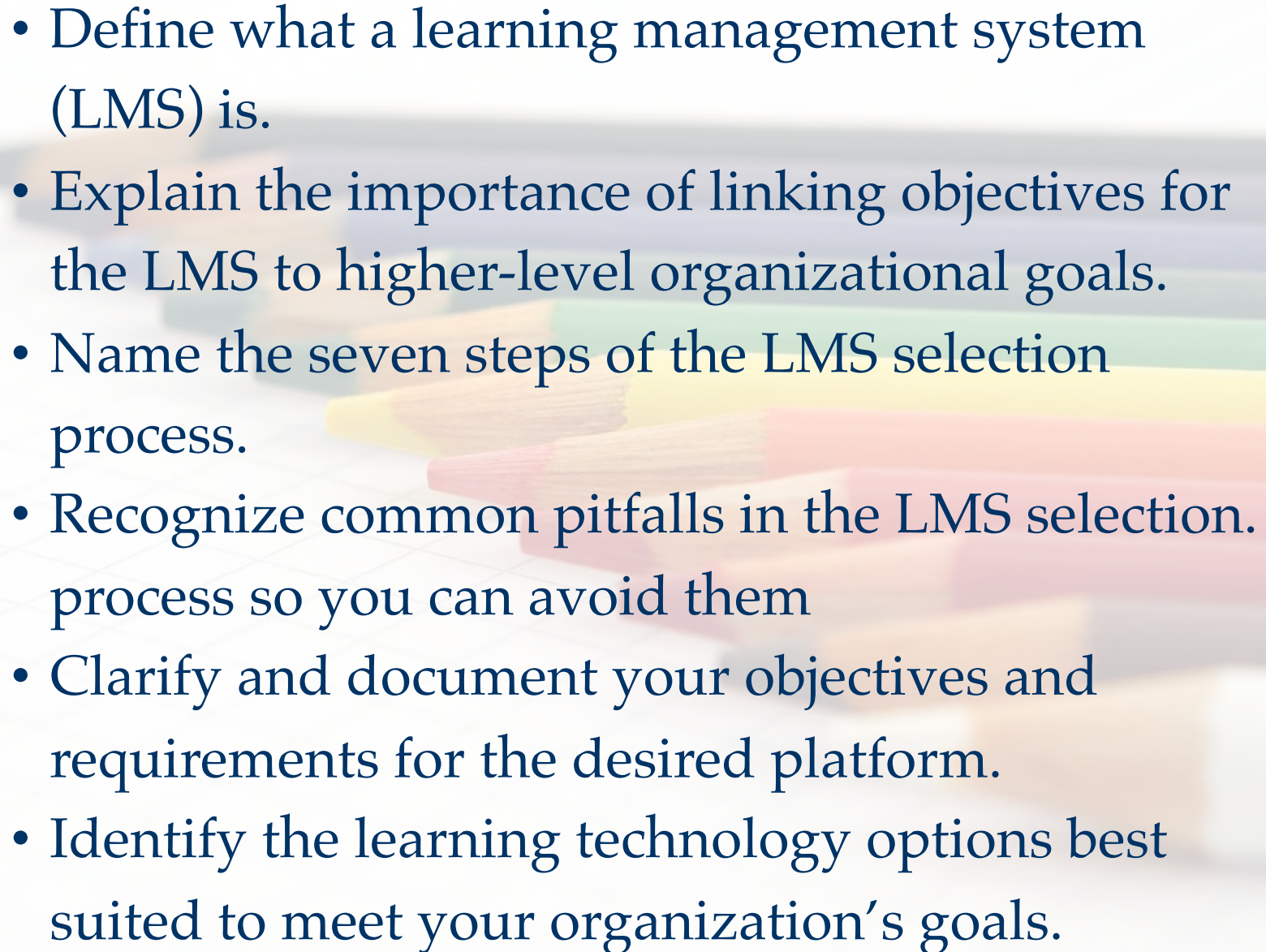
Source: *Association Learning + Technology* by Celisa Steele and Jeff Cobb (Tagoras, 2017).  
 Available at [tagoras.com/catalog/association-learning-technology](http://tagoras.com/catalog/association-learning-technology).



- Lower-cost options
- Move to hosted and cloud solutions
- Better integration and interoperability
- Support for richer experiences
- Improvements in reporting
- More focus on market-facing providers, like associations
- More sophisticated and complex

# LMS Developments

- 
- Background on Tagoras
  - Common pitfalls
  - 7-step process
  - Questions and comments

- 
- Define what a learning management system (LMS) is.
  - Explain the importance of linking objectives for the LMS to higher-level organizational goals.
  - Name the seven steps of the LMS selection process.
  - Recognize common pitfalls in the LMS selection process so you can avoid them
  - Clarify and document your objectives and requirements for the desired platform.
  - Identify the learning technology options best suited to meet your organization's goals.



*Jeff Cobb &  
Celisa Steele*



- 35+ years in learning and education
- Extensive experience with learning businesses
- Learning business-focused resources
  - <https://www.tagoras.com/resources>
  - <https://www.tagoras.com/blog>
  - <https://www.tagoras.com/newsletter>
- Leading Learning Podcast
  - <https://www.leadinglearning.com>
- Learning • Technology • Design
  - <https://ltd.tagoras.com>









# Key systems to integrate

- Main member / customer database (e.g., AMS, CRM)
- Other secondary systems
  - Webinar platform
  - Event management system
  - Online communities

# Points of integration

- Single sign-on (SSO)
- E-commerce
- Learner activity data

# Approaches to integration

- Phases
- Support and maintenance

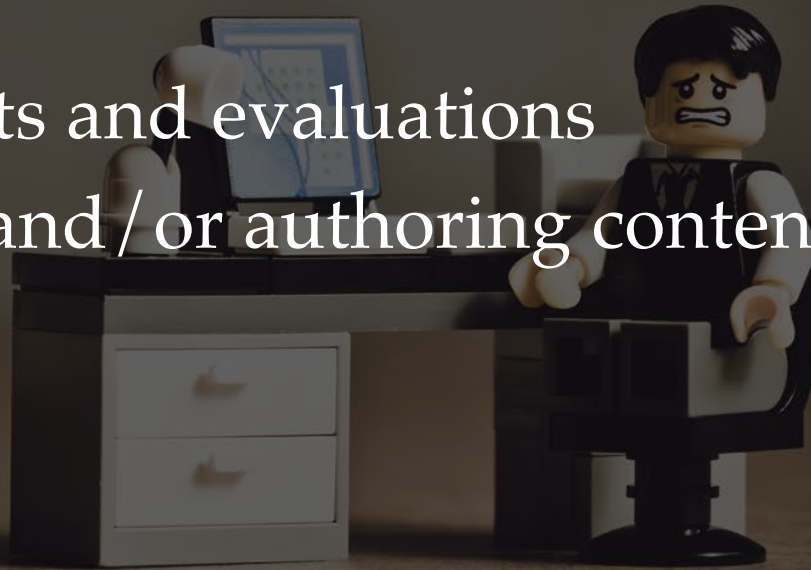
INTEGRATION





# Poor Support for Admin Processes

- Typical areas worth probing
  - Continuing education credit
  - Reporting
  - Assessments and evaluations
  - Importing and/or authoring content



# Poor Support for Admin Processes

- A must-have *in the LMS*?
  - Constellation of platforms instead?
  - Ties to integration



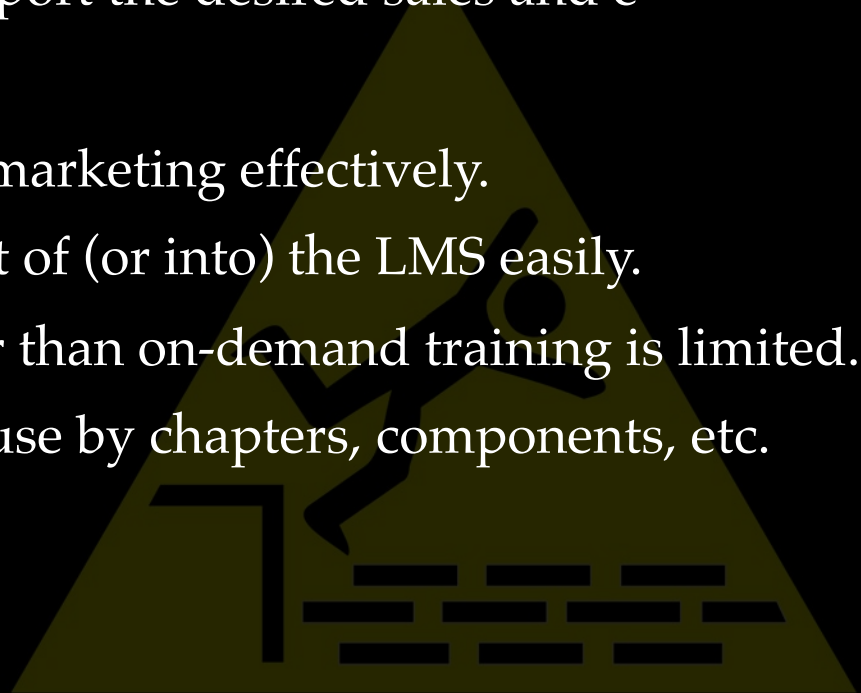
# 8 Pitfalls to Avoid

1. The LMS doesn't integrate well with other key systems.
2. The LMS doesn't fully support key administrative processes.



# 8 Pitfalls to Avoid

1. The LMS doesn't integrate well with other key systems.
2. The LMS doesn't fully support key administrative processes.
3. The LMS doesn't fully support the desired sales and e-commerce models.
4. The LMS doesn't support marketing effectively.
5. Content can't be gotten out of (or into) the LMS easily.
6. Support for anything other than on-demand training is limited.
7. The LMS doesn't support use by chapters, components, etc.
8. The usability isn't great.

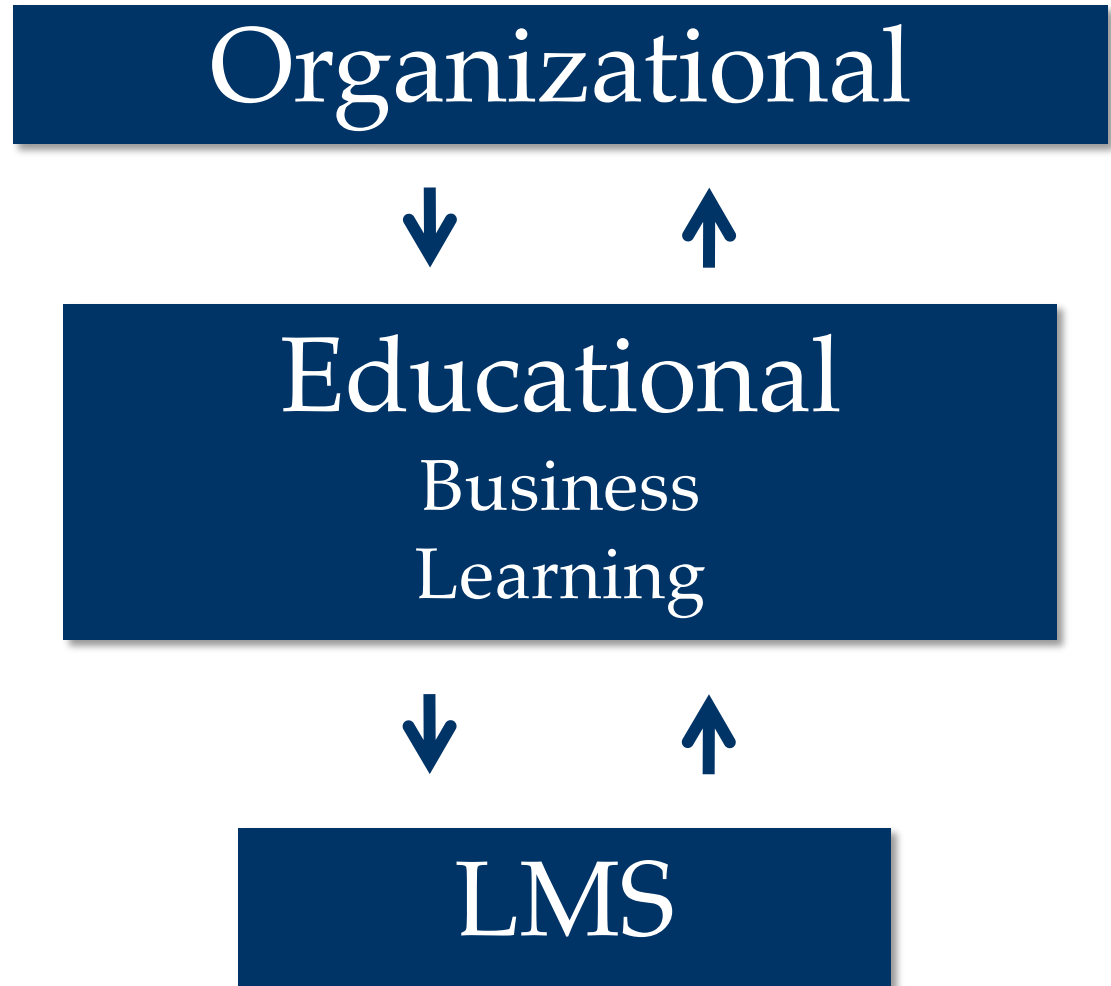




# The 7-Step Process



1. *Identify  
and clarify  
objectives.*



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Establish value of model



Demonstrate impact of  
education



?

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Demonstrate impact  
of education



Tracking  
Measurement



# *Your Objectives*

1:30

- Your organizational objective
  - \_\_\_\_\_
- Business / learning objective for your educational programs
  - \_\_\_\_\_
- Your LMS objective
  - \_\_\_\_\_



Organizational objectives



Educational objectives



LMS objectives



Needs and requirements

Use cases and scenarios

All users

Categories and priorities



2.  
*Identify  
needs and  
requirements.*

- What are the ways in which our learners will typically register at our Web site, and what process or processes will result in their enrollment in a learning experience?
- Is it important to support multiple options for registration and enrollment?

**Registration**

**Enrollment**

**Managing  
Continuing  
Education and  
Certification**

- Do we expect to issue continuing education credit for learning experiences managed through the platform?
- What are the complexities of our credit process, and how would a software system ideally support this process?
- What key requirements do our end users have for tracking their continuing education?
- How might we add significant value beyond these requirements?

**Assessments**

**Evaluations**

- What role will assessment play in the learning experiences we intend to manage through the platform?
- What are the complexities of our approach to assessment, and how would a software system ideally support this approach?
- What role will evaluation play in the learning experiences we intend to manage through the platform?
- What are the complexities of our approach to evaluation, and how would a software system ideally support this approach?

2	<b>Org Priorities</b>			
3	<b>M</b>	A "must have" requirement (Org would not launch the new LMS without this functionality.)		
4	<b>S</b>	A "should have" requirement (This is important, but Org would launch without it if necessary.)		
5	<b>N</b>	A "nice to have" requirement (Org can see how this requirement might be valuable in the future.)		
6				
7				
8	<b>Functional Area</b>	<b>Requirement</b>	<b>Priority</b>	<b>Notes to Vendor</b>
21	Educational Content	Ability to associate a facilitated discussion board with a specific course (accessible only to learners enrolled in that course)	S	Discussion need to provide for threading/nesting or some other approach that makes it possible for learners and facilitators to easily track the flow of a discussion and determine who has commented on what. We suggest providing a screen shot of your discussion environment.
22	Educational Content	Ability to effectively support communities of practice and/or facilitated course experiences	S	In addition to any discussion tools you provide, please briefly describe other tools that might be used to facilitate a community of practice within your system.
23	Presentation and Access	Ability to customize the look and feel of an end user site to mirror Org's desired branding as closely as possible	M	Please indicate the extent to which customization of look and feel is possible and how this is achieved (e.g., CSS)
24	Presentation and Access	Ability to provide distinctly branded/co-branded instances or areas of the site for groups.	M	A large bank, for example, may want a branded instance of the Org site for use with its notaries.
25	Presentation and Access	Ability to display or hide specific content based on user/group profile data	S	
26	Presentation and Access	Ability to set enrollment durations for courses	M	
27	Presentation and Access	Ability to display advertising on the LMS site	N	There should be screen real estate available for promotions that may be relevant to learners. To the extent that you also provide tools for managing and tracking display advertising within the system, please provide details.
28	Presentation and Access	Search engine optimization capabilities	M	Catalog pages should Web and it should be specify desired title tags



# When developing requirements...

- Use the minimum effective dose.
- Be concrete and specific.
- Avoid subject language.
- Asking why can help determine priority for requirements.





# *Your* Requirements

1:30

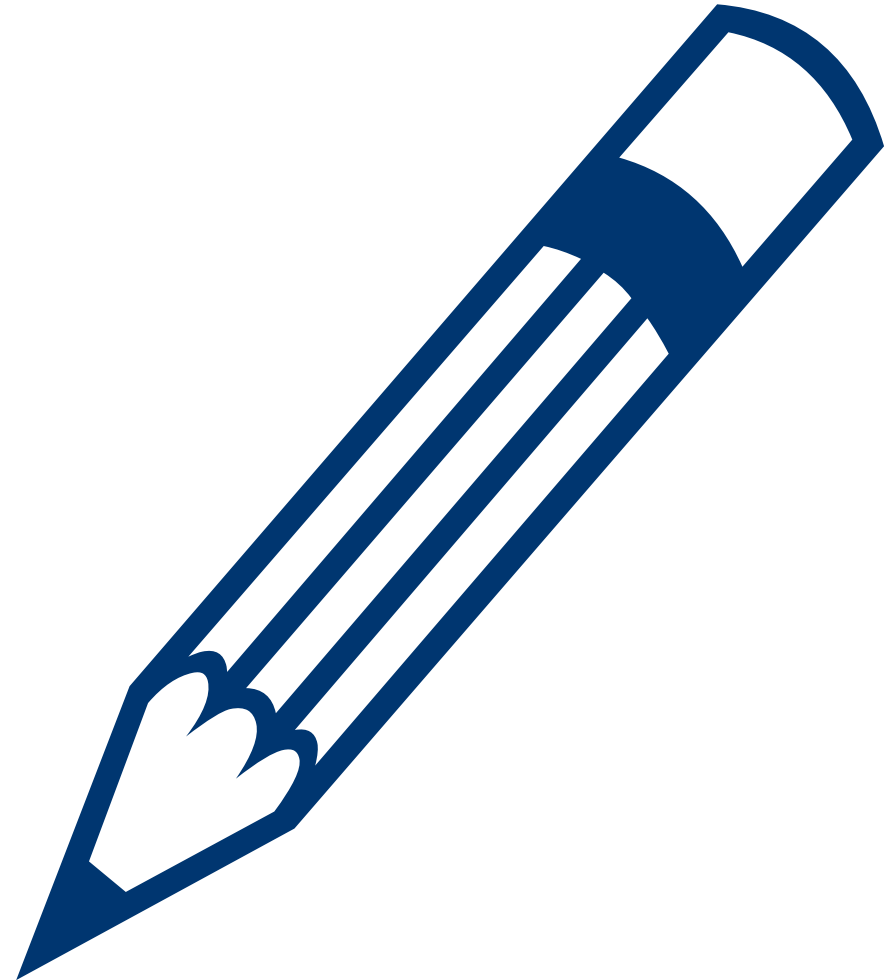
- Topical area

- \_\_\_\_\_

- Question(s)

- \_\_\_\_\_

- \_\_\_\_\_



### 3. *Pre-vet and shortlist vendors.*

Identify ~5 vendors to send your RFP to.

- Take advantage of demos, white papers, and Webinars.
- Look for examples like you.
- Use requirements to winnow out systems.
- Tap into peer knowledge and resources.




[reviewmylms.com](http://reviewmylms.com)

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[tagoras.com/resources](http://tagoras.com/resources)

#### Resources



We produce resources in a handful of areas that we feel are most essential for leaders and aspiring leaders in the business of lifelong learning, continuing education, and professional development.

Follow the links under "Resource Categories" below for pages dedicated to each of these areas. (You will, of course, find some overlap in the resources on these pages – very few resources fit neatly into a single category!)

Also, while you are here, [download our free lifelong learning business resources document](#) for easy reference and sharing, and [subscribe to the Leading Learning newsletter](#) to get new resources as they come out.

#### Resource Categories

- [Trends](#)
- [Strategy](#)
- [Marketing](#)
- [Learning](#)
- [Technology](#)
  - [Tagoras Platform Directory for Learning Businesses](#)
  - [Learning Management System Selection Resources](#)
  - [Virtual Conferences and Events](#)

# Other Sources for Vendors?



4.  
*Develop  
and issue  
an RFP.*

## RFP components

- Narrative
  - Organizational overview
  - Situation
  - Objectives
  - Timeline
  - Contact
- Spreadsheet



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4.

*Develop  
and issue  
an RFP.*

## RFP components

- Narrative
  - Organizational overview, situation, objectives, timeline, contact
- Spreadsheet
  - Requirements
  - Company and platform background
  - Costs (licensing, implementation, training, support)
  - 3 to 5 references
- Request for cover letter

5.  
*Review  
and score  
responses.*

- Review separately, then together.
- Rank based on each vendor's ability to meet objectives.
- Consider risks associated with each vendor.
- Score based on priorities and vendor's capabilities.
- Consider future and present needs.

6.  
*Conduct  
in-depth  
demos.*

- Create a structured, but flexible script (agenda).
  - Rely on scenarios and use cases.
  - Focus on most critical and complex needs.
  - Send script well in advance.
- Allow 2 to 3 hours per vendor for round-one in-depth demos.
- Narrow field and follow up as needed to clarify key areas



In addition to whatever background/overview information you feel it is appropriate to provide about your company, we ask that you cover each of the areas below during your presentation. The items listed are not meant to be restrictive – you can and should go beyond them as appropriate to show your company and its platform in the best possible light – but we strongly recommend making sure that, at a minimum, each item listed is covered. The use of a common framework for the demonstration meetings will make it easier for us to compare and contrast vendors.



Deliverable	Did the vendor demo the requested use case?  <b>Yes</b> = The exact requested use case was demonstrated. <b>Sort of</b> = An approximation, or proxy use case, was demonstrated. <b>No</b> = The use case was not demonstrated (whether due to oversight, lack of time, or lack of capability).	How would you rate the capability?  <b>Minimal</b> = The capability exists but leaves something to be desired. <b>Sufficient</b> = The capability exists and works as desired. <b>Excellent</b> = The capability exists, works as desired, and is robust and versatile. <b>Not applicable</b> = The capability was not demonstrated.	Do you have comments or notes?  As desired, use this area to provide notes on why you rated the capability as you did or to make other notes.
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### 1. Course access by end user

Please take us through a typical end user course experience in which the user:

- Takes a pre-test
- Navigates through course content (preferably content that contains some video)
- Takes a post test
- Completes an evaluation
- Is issued a certificate reflecting continuing education credit earned

Overall course experience is intuitive and user friendly	<input type="checkbox"/> Yes <input type="checkbox"/> Sort of <input type="checkbox"/> No	<input type="checkbox"/> Minimal <input type="checkbox"/> Sufficient <input type="checkbox"/> Excellent <input type="checkbox"/> Not applicable	
--	---	--	--



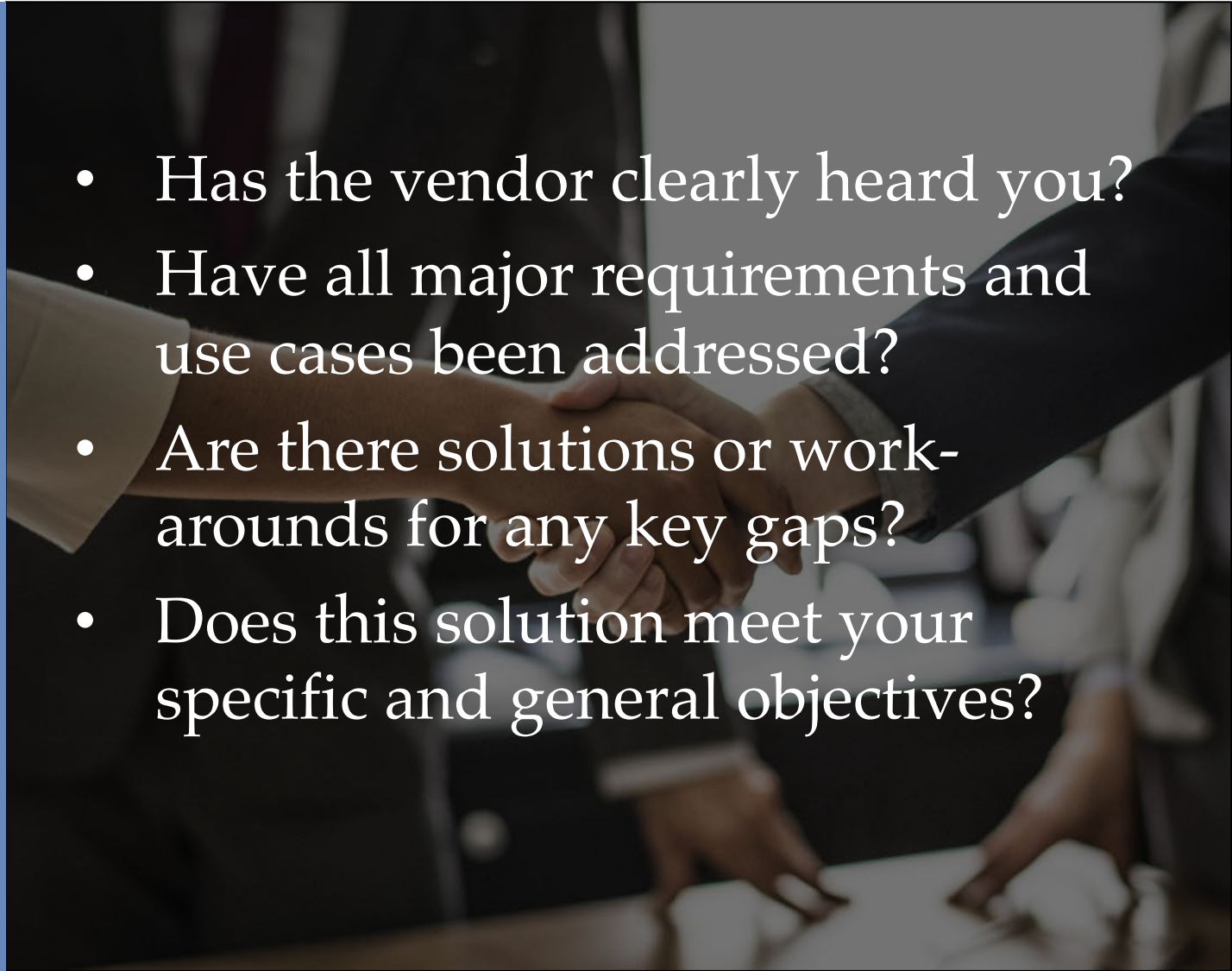
# Your Demos?



7.

*Select and negotiate.*

- Has the vendor clearly heard you?
- Have all major requirements and use cases been addressed?
- Are there solutions or work-arounds for any key gaps?
- Does this solution meet your specific and general objectives?



# The 7-Step Process



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