THE SEVEN-STEP PROCESS
FOR SELECTING A LEARNING PLATFORM

1 IDENTIFY & CLARIFY OBJECTIVES
Have a conversation with different groups across the organization (IT, HR, marketing, etc.)

Brainstorm and map out your high level strategic objectives.

2 IDENTIFY NEEDS & REQUIREMENTS
Translate learning objectives into system requirements.

Prioritize requirements into – MUST HAVE, SHOULD HAVE, NICE TO HAVE.

OBJECTIVES · REQUIREMENTS

3 PRE-VET & SHORTLIST VENDORS
Look at vendors' demos, white papers, webinars, etc.

Gain knowledge about vendors' prior experience with organizations like yours.

4 DEVELOP & ISSUE RFP
Use a narrative section to present your story and all relevant information.

Specifically document what you need. Share the requirements checklist.

My Story...

5 REVIEW & SCORE RESPONSES
Keep objectives clearly in mind when discussing.

OBJECTIVES

Rank responses based on each vendor's ability to meet objectives. Consider risks associated with each vendor.

6 CONDUCT DEMOS
Focus on most critical and complex needs.

DEMO

Create a structured but flexible script. Send script well in advance.

Q&A

2-3 hours per vendor for round-one demos.

7 SELECT & NEGOTIATE
Use quantitative and qualitative data to make a decision.

Consider costs & associated risks. Review the contract. Negotiate on costs.

GET READY FOR IMPLEMENTATION!

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