

PITFALLS OF LMS SELECTION

A PROCESS TO HELP YOU AVOID THEM

In our work with a wide range of clients (predominantly professional societies and trade associations), we've repeatedly seen organizations run into the same issues and challenges with their learning management system (LMS) selection. Because these issues and challenges crop up among different organizations, we offer here eight common pitfalls of LMS selection.

First, read about each pitfall, and determine if your organization is susceptible to it.

If the pitfall touches on an area that is likely to be or will be an issue for your organization, then use the questions and comments that follow it to help you avoid that pitfall. We encourage you to document your responses so you have a record of your thinking and decisions to refer back to and to share with others as appropriate.

If the pitfall doesn't apply to your organization, then there's no need for you to work through the corresponding questions and comments. If, for example, you aren't integrating the LMS with other systems, then simply move on to reviewing the next pitfall.

PITFALL 1: THE LMS DOESN'T INTEGRATE WELL WITH OTHER KEY SYSTEMS.

For associations, one of the other key systems is usually the association management system (AMS). Additional key systems might include Webinar platforms (if one is being used to deliver learning and the organization wants to be able to track who has attended and participated in which educational Webinars); event management systems (for tying learner participation at place-based conferences and other events to the LMS data); and knowledge and collaboration tools (like an online community that might be used for social or informal learning).

PLANNING TO AVOID THE INTEGRATION PITFALL

- P1.1. Create an inventory of the technology systems in the organization that house learning- or learner-related data. List, in general terms, what learning- or learner-related data those systems hold *that needs or may need to be integrated with the LMS*. Typically, data to be integrated relates to profile information (e.g., log-in credentials, names, and e-mails that allow the user to be authenticated and recognized the same way in more than one system), e-commerce information (e.g., purchases), and learning activity (e.g., attendance at a Webinar or at a conference). Identify the owner of each system—someone intimately familiar with that system and its data. Work with the system owners to verify the inventory accurately and completely captures the types of data in each system that need or may need to be integrated with the LMS. You can use a simple three-column chart for your inventory.

System	Learning- or Learner-Related Data	System Owner
AMS	<i>profile data purchase information certifications</i>	<i>Rashida</i>
Webinar platform	<i>attendance</i>	<i>Jordan</i>

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- P1.2. For the data that will be integrated (profile data, e-commerce data, and learning activity data), identify which system's database will be the authority, or database of record. You generally don't want it to be possible to change data in multiple places, as member records can get out of sync, and it can be difficult to know where to look for all the user's most up-to-date information. In most cases, it makes most sense for the AMS to serve as the database of record for profile data, the e-commerce system (often part of the AMS) to serve as the database of record for e-commerce data, and the LMS to serve as the database of record for learning activity data.
- P1.3. Integration can be phased. For example, you might launch the LMS initially with single sign-on (SSO) between the LMS and AMS, and then later put an integration in place to pass learner activity data from the LMS to the AMS in real time. Does a phased integration make sense because of cost, timeline, or some other reason? If yes, make sure you have a workable solution for the initial integration and understand how that integration can be extended in the future.
- P1.4. How will each of the integrations be supported and maintained over time? What happens as new versions of the systems are released? What is the plan for making sure the integrations don't break? You need to talk with the other internal system owners and your system vendors to be clear on the process for supporting and maintaining the integrations and who is responsible for what.

PITFALL 2: THE LMS DOESN'T SUPPORT MARKETING EFFECTIVELY.

For learning management systems that grew up to serve academia or corporate learning, baked-in marketing wasn't important—the marketing either happened earlier (as in the case of a student enrolling in a university) or wasn't needed (because in the corporate environment a boss can order her employees to take a training). But for market-facing organizations, like associations, that are trying to sell education, marketing in or through the LMS is key. Your LMS users, once you have some, are currently learning from you and are therefore your top prospects. You need to be able to market to them.

PLANNING TO AVOID THE MARKETING PITFALL

- P2.1. How does the LMS handle e-mail communication with learners? Is there an e-mail capability built in to the LMS? Will a planned integration (see Pitfall 1 above) allow you to handle e-communication with learners? Is there an existing LMS integration with a third-party e-mail tool? Understand how you will be able to handle e-mail marketing.
- P2.2. Does the LMS provide for suggestive selling and recommendations? If yes, how sophisticated is the functionality? Is it a hard-coded, administrator-created association between courses, such that individuals who enroll in Course A see marketing tiles that promote Course B? Or is it more dynamic, Amazon-like functionality that draws on a particular user's past enrollment history or profile data to promote specific courses to her?
- P2.3. Do you want to allow learners to rate or provide comments on learning experiences? If yes, does the LMS support ratings and comments?

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- P2.4. How does the LMS handle previews and samples? A marketing staple is providing prospective buyers with a preview or sample to entice them to buy. You need to understand what the system does (or doesn't) support so you know your marketing options and what help—or hurdles—you'll encounter in the LMS.

PITFALL 3: THE LMS DOESN'T FULLY SUPPORT KEY ADMINISTRATIVE PROCESSES.

When an LMS makes it hard to complete key administrative tasks, then, no matter how well it works for your learners, it's a pain point for your staff. Handling continuing education credit, reporting requirements, importing and authoring courses or other content, and managing assessments and evaluations are typical problem areas and worth probing during the LMS selection process.

PLANNING TO AVOID THE KEY ADMINISTRATIVE PROCESSES PITFALL

- P3.1. What are your key administrative processes related to continuing education credit? For example, does your organization may need to award different types of credit for the same course, based on the type of learner, doctor versus nurse, for example? If yes, how does the LMS support that?
- P3.2. What are your key administrative processes related to reporting? What data do you need for internal purposes or to report or share with external entities? Does the LMS allow you to get at that in a reasonably efficient manner?
- P3.3. Are you using an external authoring tool? If yes, make sure you understand the complete flow for importing that content into the LMS. Do you want to be able to author directly in the LMS? If yes, make sure you're clear on the abilities of the built-in authoring tool as well as how you export that LMS-authored content should you need to switch systems in the future.
- P3.4. What are your key needs around assessments and evaluations? Do you need randomization, item analysis, or the ability to provide learners with a view of how their responses compare to an overall average?
- P3.5. What other key administrative tasks do you need to be able to complete? Are you clear how you do that in the LMS?
- P3.6. Review the key administrative processes and tasks you've identified to see any might better be handled outside the LMS. If, for example, you have very sophisticated or complicated authoring needs, you may need a separate authoring tool, not something built in to the LMS. The same may apply to complicated assessments or evaluations. Regardless of whether it is ultimately handled by the LMS or by another system, make sure you have a plan for supporting each of your key administrative processes. If you will use another system to handle a task or process, what integration may be need (see Pitfall 1 above)?

PITFALL 4: THE LMS DOESN'T SUPPORT DESIRED SALES AND E-COMMERCE MODELS.

You may need to provide pricing options beyond member and non-member pricing, discounts for bulk sales, bundle products together (a book with a course, for example), or issue codes so multiple employees at a member organization can enroll in a course.

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PLANNING TO AVOID THE SALES AND E-COMMERCE MODELS PITFALL

- P4.1. How many tiers are in your standard pricing model? If you offer something other than member/non-member pricing, make sure the LMS supports your model.
- P4.2. Do you sell or plan to sell to organizational buyers who will be purchasing on behalf of more than one individual? If yes, how does the LMS support the buying process (if the LMS will handle that), and how does the LMS support the individual learners getting access the content? What does the LMS automate, and what must your staff or the organizational buyer do? What flexibility does the LMS allow? For example, can the organizational buyer purchase a pool of credits that can be redeemed for a range of items (e.g., online sessions at different times), or must she purchase a specific course or piece of learning content?
- P4.3. Do you have products that you would like to bundle together? If the bundled products are delivered differently (e.g., access to online course and the shipping of a physical book), how does fulfillment work? Do you want to be able to offer a discount for bundled products?
- P4.4. What support for coupons, discounts, or other special pricing does the LMS support?

PITFALL 5: CONTENT CAN'T BE GOTTEN OUT OF (OR INTO) THE LMS EASILY.

Standards and guidelines have been developed to ensure content developed in one system will act as designed in another. Common technology specifications related to learning include [SCORM](#), [xAPI](#) (also referred to as Tin Can), and [LTI](#). But every LMS doesn't make use of every available specification, and the specifications don't necessarily cover all types of content—for example, if on-demand content in an LMS is SCORM-conformant, it may still be difficult to export other content associated with SCORM modules, such as discussions, for use in another LMS.

PLANNING TO AVOID THE IMPORT/EXPORT PITFALL

- P5.1. What content do you have that needs to be loaded into the LMS? Was that content developed according to particular standards or specifications? If yes, does the LMS support those standards and specifications? What will the process be for importing content? How labor-intensive is that process? Consider more than on-demand courses when thinking about content—facilitated courses, discussions, documents, etc.
- P5.2. Should you decide to leave the LMS in the future, how will you get your content and data out of the system? In what formats? Are those formats industry standards that will allow you to use your content easily in other systems?

PITFALL 6. LMS SUPPORT FOR ANYTHING BEYOND ON-DEMAND TRAINING IS LIMITED.

Most learning management systems originated as “launch and track” databases for on-demand, self-paced training. Vendors vary widely in how well they have evolved to support blended learning, facilitated learning, social learning, and informal learning.

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PLANNING TO AVOID THE ON-DEMAND-FOCUS PITFALL

- P6.1. What types of learning do you need the LMS to support, and does the LMS support these types? Consider self-paced online courses, facilitated online courses, blended learning (e.g., technology-based programs combined with classroom-based learning), placed-based learning (e.g., at a workshop or conference), real-time Webinars, recorded Webinars, video, and informal learning (which might be supported by discussions and document-sharing).
- P6.2. Do you understand the learner and administrator experience for each type of learning as it's supported in the LMS?

PITFALL 7. THE LMS DOESN'T SUPPORT USE BY CHAPTERS OR COMPONENTS WELL.

Most learning management systems are not designed to cascade and allow chapters, components, and other key groups in your organization's ecosystem to the ability to manage their own branded instance of the system.

PLANNING TO AVOID THE CASCADE PITFALL

- P7.1. Do you wish to allow chapters, components, partners, or other organizations to have subsites under the umbrella of your instance of the LMS, and does the LMS support that need?
- P7.2. How will your organization administer its instance of the LMS and support administrators at the subsite level? How does the connection between your main site and the subsites work for sharing content (e.g., courses) and user data? Which choices can be made at the subsite level, and which are set at the top level (courses, functionalities, branding, etc.)?

PITFALL 8. THE USABILITY ISN'T GREAT.

When the LMS is hard to use, people complain—and usability is the most common complaint we encounter among organizations looking to replace their current LMS. The best opportunity you have for assessing a system's usability comes during demonstrations.

PLANNING TO AVOID THE USABILITY PITFALL

- P8.1. Make sure the LMS selection team sees the user experience for your most basic and critical use cases (e.g., a learner enrolling in a course, navigating the course, completing an evaluation, and receiving a certificate). Cover use cases for both learners and administrators.
- P8.2. After initial guided demonstrations, ask the LMS vendor for access to a sandbox or demonstration site where you can directly use features and functionalities and further assess usability.

AVOIDING THE PITFALLS WITH PROCESS

Along with using the questions and comments above to help you avoid these pitfalls, we advocate following a defined process for selecting a learning management system. We use a

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time-tested, seven-step process (available as an infographic) to identify the appropriate learning management system.

Other LMS selection resources are available on the Tagoras Web site. We hope this resource and others will help you avoid pitfalls and find the right learning management system for your organization.

Need More Help with LMS Selection?



Learning • Technology • Design (LTD), May 18 and 19 in Arlington, VA, will include a deep-dive session focused on learning technology selection—an in-depth look at the seven-step process we use with organizations looking for the right learning management system. Learn more at <http://ltd.leadinglearning.com>.

