Demonstration Guidelines

We have found through the course of many technology selection engagements that the use of a common framework for the demonstration meetings will make it easier to compare and contrast solutions and reach a decision more rapidly. So, we ask that you be sure to cover each of the items here – all of which align with PMA's key objectives – as part of your demonstration. A few notes to go with the table that follows:

- You are welcome to provide general background information about your company, but we recommend you keep this as brief as possible – PMA staff will have already reviewed information you provided with the RFP.
- **We are requesting that this demonstration be recorded**, as a number of PMA staff will need to review it independently from the live session. That being the case, please follow the order below as closely as possible. To the extent that you do deviate from the suggested order, please let PMA staff know which area you are covering as you move through the demonstration.
- We strongly recommend that you complete an area before moving on to a different area. PMA staff will be trying to absorb and process a lot of information. Jumping around too much between different areas of a platform can become confusing quickly and interfere with accurate evaluation.
- **Please be clear throughout the demo about what is a standard part of the solution/pricing you proposed vs. what would require additional costs (e.g., as a result of customization, additional modules, etc.)**

Finally, 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 – **just keep in mind the overall time allocated for the demonstration and pace yourself accordingly.**

Area #1: End User Learning Portal Experience and E-commerce
One of PMA's key objectives is to provide a clear, attractive, user-friendly experience for end users. Please demonstrate the typical experience a user would have in finding and accessing learning content in your system. This should include: • The general look and feel of the site and how closely this can conform to whatever branding and navigational structure PMA requires • Navigating through and searching in a course catalog • Walking through the potential enrollment scenarios (e-commerce, enrollment code, etc.) • An example of multi-tenancy – i.e., multiple end user portals provided via a single client license of your system • As an important part of the above, highlighting and discussing potential points of integration with other PMA systems – **particularly Personify** (e.g., single sign-on, typical points of integration for e-commerce). **To the extent you can, please show an example of integration with Personify as it would be experienced by an end user.**
Area #2: End User Learning Experience
While PMA is primarily interested in the LMS as a platform for on-demand online courses – with a likely emphasis on video-driven content - it is important that the platform PMA selected be able to support multiple learning format, including, but not limited to, live and on-demand Webinars and face-to-face courses courses. Please take us through some typical end user course experiences in which the user: • Accesses each of the following learning formats:

- A self-paced online course
- An instructional video
- A scheduled Webinar
- Materials/information related to a face-to-face course

For at least one of these, please show how the learner:

- Accesses documents relevant to the course
- Accesses, reads, and posts to a discussion forum
- Completes an assessment
- Completes an evaluation
- Is issued a downloadable PDF certificate reflecting any credit earned
- Views a transcript reflecting credit awarded and access to any certificates earned

Area #3: Educational Content Administration: On Demand Content

Take us through the administrator experience of configuring and publishing an online course. Please address the following:

- Importing and configuring a video as a course
- Importing and configuring a SCORM-based lesson
- Associating documents with the course
- Setting enrollment duration
- Associating an evaluation and/or assessment with the course
- Setting credit value for the course
- Associating a certificate with the course

Area #4: Educational Content Administration: Live Webinars

Take us through the administrator experience of setting up access to a live Webinar. Please address the following:

- Configuring the Webinar for registration in your system (naming, scheduling, etc.)
- Creating a launch link for the Webinar
- Any typical integration points (e.g., single sign-on, data pass back)
  Please discuss the degree to which you have integrated with popular Webinar platforms – particularly GoToWebinar - to automate the set up of Webinars through the LMS and receive data about learner participation back from the Webinar platform.
- Associating an evaluation and/or assessment with a Webinar
- Setting a credit value for a Webinar
- Associating a certificate with the Webinar
- Any abilities to manage the speaker or speakers assigned to deliver a Webinar

*[**Note:** to the extent that the administrative functions (e.g., setting credit values, associating a certificate) are the same from one course format to another, you do not need to repeat them.]*

Area #5: Educational Content Administration: Face-to-Face Courses

To the extent you have not already, please demonstrate how a face-to-face course can be scheduled and scheduled in the system. Include any tools/approaches you have to managing the instructors associated with specific learning experiences.

Area #6: E-mail Communication with Learners

With reference to the requirements in **items 56-64** in the LMS Requirements spreadsheet, please demonstrate how e-mail communication with learners can be managed in your system.

Area #7: Assessments

With reference to the requirements in **items 65-95** in the LMS Requirements spreadsheet, please briefly demonstrate briefly how an assessment (test) can be authored and configured in your system.

Area #8: Evaluations

With reference to the requirements in **items 96-107** in the LMS Requirements spreadsheet, please briefly demonstrate briefly how an evaluation (survey) can be authored and configured in your system (including how they can be configured as mandatory for completion/receiving credit).

Area #9: Tracking and Reporting

A key objective of implementing an LMS is to improve PMA's abilities to access and report on meaningful data about the member education experience and engagement levels. Reporting capabilities should give PMA visibility into the full range of its educational activities – including, as appropriate, pulling relevant data from integrated systems. It should be easy to export key data from the system so that it can be manipulated and shared as needed. Finally, the system should also provide user-friendly "dashboard" type approaches to viewing data.

With these objectives in mind, please, demonstrate an administrator's access to reports and data in the system. Please address the following:

- Show the range of standard reports that are available "out of the box" for addressing the items indicated above and similar types of data
- Show filters and options that can focus the data based on various criteria such as the users' geographic location, organization, age, job role, etc.
- Show any capabilities for creating "ad hoc" reports in the system
- Show how reporting would work for a tenant in the system

Discussion points:

- Please describe your usual approach to implementation, including the involvement you will need from PMA and typical timelines
  - In what areas are costs likely to vary from those indicated in your RFP response (particularly in semi-standard (SS) and completely custom (CC) areas)?
  - How are content and data migration typically handled? What issues do you foresee, based on what you currently know?
  - What is your user acceptance testing and sign-off process?
  - How do you maintain/support integrations with Personify – e.g., **what happens when Personify has a major upgrade or vice-versa**?

- Please describe your overall approach to support, training, and ongoing client account management
    - What are the key “hand-offs” in support and account management and what are the processes for handling them?
    - How many accounts does the dedicated account manager handle at one time? How can PMA expect to interact with this person?

