

Implementing an Learning Management System

10-Steps Process to your LMS

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LMS Steps 1-4: Analysis

Before you even begin the selection and implementation process for your LMS, you should first turn your attention to the analysis and assessment of various aspects of your organization, its structure, and its learning needs. We will treat this analysis and assessment as steps one through four of the ten-step LMS implementation process. Plus, you'll also need to assess your own learning and development organization's needs in regard to the system, but we will discuss that as a separate step in your process.

To start with, you'll want to analyze and assess the audience in general. This may seem easy, but some organizations have a diverse population in terms of technical experience, corporate or organizational learning experience, and even willingness to use online or hosted systems in regard to their personal development. In order to assess your audience, you may want to consider a survey that asks the organization's members about their technical experience, their willingness to register for courses online, their ability to take courses online, and also their perceptions of learning management system tasks, activities, and functions.

Site visits are also helpful when assessing your audience. For example, a manufacturing environment may not allow for widespread access and use of an LMS, but a corporate environment might. You can also learn quite a bit about the population the LMS will serve by simply observing their work habits, as well as those of their supervisors.

Next, take the time to examine what learning is already in place within the organization. If

you've already centralized training and development, you probably have a good idea of what courses exist, which ones need to be converted to an online format for LMS delivery, and which ones will need to be listed as classroom in the registration functions of the system. If you have not centralized learning, the implementation of an LMS is a good reason to undertake the task. Various departments within the organization may have their own training programs that need to be "housed" within the LMS environment. Keep in mind that simply pulling training opportunities into the LMS does not mean that the training and development department has to take them over completely - it simply means that training and development must be aware of each offering.

Step three involves technical analysis. Is the organization's technical infrastructure ready for an LMS? Does adequate bandwidth exist? Do laptops and desktop computer setups have the necessary hardware and software to offer the LMS and online courses? To discover the answers to these questions, form a solid relationship with the organization's IT decision-makers before you begin LMS vendor demonstrations. This way, you'll have access to the people who can "make or break" the LMS and its functionality, and you'll also be able to ensure that there are no surprises during your rollout.

Step four is business-case analysis. Any department within the organization that plans to use the LMS should be asked what functions they may need. For example, departments with a large number of positions and career path possibilities may need to utilize career pathing, course tracking, and transcripts. But small departments may only want to access what the

organization provides via the LMS. If you are lucky enough to have a project manager assigned to the LMS implementation, he or she will most likely create written business case analyses for each area as you interview them for their LMS needs. From these assessments, you can create a list of the features and functionalities that are absolutely necessary, "nice to have", and not necessary. And you can use your list to narrow down your vendors, eliminating those that cannot provide what your organization needs in a learning management system.

The analysis phase of your LMS implementation is perhaps the most important. Without solid facts about the organization, its technology, and its business needs, the LMS runs a high risk of missing the mark. Next, we will look at internal needs analysis, that is, within the training and development organization.

Training Department Analysis

No matter how large or small your organization is, the department that will probably use the learning management system more than anyone else is your own training and development organization. For the most part, administration, data entry, data usage, and "back office" functions will be run via the training department. Because of this, it is vitally important that you lead your staff through a thorough needs analysis.

Consider how your staff is currently organized. There may not be many staff members, but each one has a function. Or, you may have various staff in various departments throughout the training organization. Break the staff down into functional areas that relate to the LMS, such as administration, design, delivery, development, reporting, and technology. Use

these breakdowns as the starting point for your learning organization analysis.

First, look at the administrative function of the LMS. Who is going to be responsible for initial and regular data entry? For example, courses may need to be set up as a one-time event, with classes being added regularly. Will an LMS administrator conduct the one-time set up, and then move class access to instructors? Or will the administrator maintain control of this function? Plus, will there be a data management "checkpoint" person throughout the LMS life cycle?

Next, consider the overall structure of the policies related to LMS usage. For example, what is the passing grade for courses, both online and instructor-led? Will you have a failure policy that leads to a retake? Or are some courses, such as compliance, a pass-fail basis? Will certain course failures need to be reported to managers on a regular basis? In addition to these questions, you'll need to assess what qualifies required versus elective training, as well as which courses can be taken online and which cannot.

The third sample area is instructional design. Will online courses be designed outside of the LMS, using Flash or HTML, and then packaged for use on the system? Or do your designers simply need access to a pre-packaged content development system, or Learning Content Management System (LCMS)? From your organizational technical analysis, can you determine if the audience is going to expect social media, such as chat rooms, discussion threads, or blogs as part of their learning experience? If so, you may need to find a vendor that offers a Social Learning Management System, or SLMS. In addition to all

of this, if your organization has a de-centralized training structure, will managers or subject matter experts need access to the LMS in order to create and post online training courses?

After design, shift your focus to delivery. Will all instructors have access to the LMS? Will each person who teaches a class or course need to access rosters, record attendance, and post grades when each class is completed? Does the organization need to implement a registration deadline so that instructors can prepare for classroom courses effectively? For example, you may want to consider a registration deadline of a day or two before the event if the class is material-heavy. This will be a great way to watch your budget as the LMS gets off the ground.

Another area to consider is professional development. Who within the training organization will manage career paths and development plans, if they are to be included in the LMS rollout? Or are career paths and development plans even necessary at the beginning? In a related sense, who will have access to training participants' transcripts? For example, some organizations restrict access to employees only, while others allow access by both the employee and his or her direct and/or indirect managers.

Finally, consider the reporting aspect of the LMS. Which managers or executives will need to see class attendance, survey results, and online course completions? Will this type of information be generated as reports on a regular basis for distribution to the key players, or will those key players be allowed reporting access at any time? In addition, is reporting simply an intra-organizational function, or will it be used to support regulatory compliance for

your organization?

This is certainly a "laundry list" of functions, tasks, and potential business needs within the training organization. But if you start here, you'll have a much better idea of what information and access the training teams need before the LMS is implemented. Next, we will look at vendor selection and demonstration.

The Vendor Search

The process of finding an LMS vendor can be just as taxing as the whole LMS implementation process in general. In today's market, there are many providers who are looking to add you to their satisfied client list, so your due diligence and patience in the selection process are absolute requirements. One of the first items on your vendor selection list should be to conduct thorough research, so let's look at how to start.

First, go to your industry network, such as colleagues in the training and development business or your local ASTD or ISPI chapters. Find out who is using an LMS and whether they are truly satisfied with their vendors. You'll find that a conversation definitely occurs with clients who are extremely happy or fairly disappointed, so be aware of the "horns and halos" effect. Look for patterns in LMS vendors in relation to your networks' industries, business needs, organizational size, and training needs. When you have a sizable list of vendors, begin your research on your own first.

Visit vendor websites to determine if any of them serve your industry or companies within your industry. That may be a good place to start, since industry knowledge is a definite plus when it comes to your provider. Most LMS vendors include a client list on their websites,

so it may be easy to look over the list and find similar organizations. One way to use the information you find is to contact the companies who are listed as clients on the vendor website. Some people may be wary of talking to you, but some may not be. This approach may give you quite a bit of information regarding the vendor.

For the initial contact with a vendor, you may want to conduct short interviews yourself. Use the list you created from the business analysis in order to construct a list of features and be sure to ask the vendor representative about their ability to provide what your organization needs. And don't forget to run a "hard line" when it comes to getting answers from potential vendors regarding your organization's business needs. Try to avoid allowing a vendor to "gloss over" the more minor needs; additional functionality can cost both time and money after the implementation has begun.

While you are looking at potential vendors, be sure to create an internal search committee. This group should consist of members of your organization's technology staff, an executive sponsor, potential LMS users, department managers, and staff from within the training and development function. Be sure to explain to the group that the interview process should be like finding the right person for a job - and that there should not be a rush to conclude the search. Once you have your group, create a general interview template for the group members, so that they will know what kind of information you will be looking for when the LMS vendors begin to appear in person for meetings and demonstrations.

When you have narrowed down your vendor choices, begin to schedule demos and meetings,

ensuring that a majority of your selection committee members will be able to be present. Impress upon the committee that they will need to do their own research and prepare a list of questions for the vendors. And remind the committee that questions need not be general - they can pertain to each committee member and his or her area. Questions can be tough, as well. There should not be a problem with putting a vendor representative "on the spot" or requiring him or her to ask one of their experts for help. After all, the vendor's goal is to transform your organization from a prospect into a client.

After the first round of demos, meet with your committee to narrow down the choices. Remember that the fewer choices you have the easier the final decision will be. Once you and your committee have narrowed down the field, have the committee come up with a plan for a final meeting and demo before the selection. By this time, each committee member should be encouraged to come up with more questions to ask the vendor.

When your selection is made, it's time to move on to further due diligence.

Further Due Diligence

You can probably take a deep breath after your selection of LMS vendors has been made. But don't get too comfortable before the implementation begins. During the time period between the selection and the signing of contracts, start moving forward on conducting some final due diligence in relation to the LMS, its functionality, its specifications, and the vendor. First, let's discuss contracts.

Most organizations have a legal counsel that reviews contract documents before they are

signed. But you most certainly want to review the contracts yourself, especially if the legal counsel was not involved in vendor selection. This may go without saying, but sometimes the temptation exists to let legal do all of the heavy lifting when it comes to contracts. In addition to the legal review, consider having a contract specialist from IT or another area review the documents.

When you begin your own contract review, look for the general specifications of your organization's LMS setup, as well as the functions you plan to purchase and use. Obviously a glaring omission on either your part or the vendor's part is a reason to have the contracts rewritten. But also take the time to compare your contract to your original business analysis list, just to make sure you've included all of the functionality you needed. It's easy to let more minor needs slip through the cracks when it's time to write the contracts.

Another area of the contract to review; are the costs that may be associated with certain actions either now or in the future. For example, although you may have everything you need for the implementation; the organization may find it needs further functionality down the road. Review the contract for additional cost and how those costs are factored; there may be a consultation fee plus an hourly charge for development, or there may simply be a fee for the customization. If your vendor will charge hourly fees for customizations, go back to your network or colleagues to see if any of them had to customize their LMS after it was implemented. This way, you'll have an idea of the time it takes for a software developer to customize your setup. Also, look for any costs that may be incurred for minor changes during the setup

and implementation. Reporting is another area that may be costly to change. For example, if your organization finds that it needs a particular report that is not in the standard report base, the customization is just like making a software change. In other words, the addition of one custom report can cost just as much as making changes to your LMS on an hourly software developer basis. A built-in general course library is a great resource, especially for time-sensitive training that doesn't have to be customized to your organization. But be sure you understand how and if your organization will have access to the LMS vendor's generic course library. If so, determine if the library is part of your initial costs or if you will be charged on a per-user basis in the future.

In relation to technical specifications, have your internal IT person review the spec documentation to look for any issues. In fact, you may want to set up a meeting between the LMS vendor's technical representative and yours - this gives them some time to discuss potential issues and plan the technical rollout. Plus, if these groups meet before the implementation, they can easily head off problems when time is vitally important to the LMS rollout.

One of the final pieces of additional due diligence is project planning. Whether you are the project manager or you have a professional project manager assigned, take the time to create a plan for the LMS rollout. From this plan, you should have a good idea of your timeline and you should also be able to see if the vendor is going to be able to meet it. Along those lines, request a project plan from your vendor, as well. With both an internal and external project plan, you can make comparisons, make adjustments, and work to

conclude the implementation phase smoothly and efficiently.

Next, we will discuss the initial build out, data population, and installation of your LMS.

Building the System

You can look at the build out of your learning management system as the point where "construction" begins. This phase usually occurs directly in line with the vendor and your agreed-upon project plan and timelines. But try to avoid leaving the entire build out in the hands of the vendor. In other words, you should stay on top of each phase and every development during the build out just in case any issues arise. Ask for consistent progress reports from the vendor's representative and your project manager, if you have one. Stay in constant communications with the vendor's team to ensure that nothing is missed. In addition to this, it may be a good idea to schedule project meetings on a regular basis just to "check in".

Internally, the build out is also a good time to maintain your communications channel with the internal IT department. With this channel open, you can report any issues, have your IT department look at them, and determine if anything is going to hold up the progress of the installation. Another best practice is to ask the vendor if they will allow small "tests" of functions that have been built out, just to ensure that those functions are meeting your specifications. Along with your IT department, you should be able to manage the construction of the LMS without any issues.

We will use the term "installation" to describe your area's preparation for the full-scale rollout of the LMS. Keep in mind that there is usually not a physical "install" of an LMS. However, you

may have some installations to implement while the system is being built. For example, your IT department may have recommended running the LMS on its own server that may need to be installed and tested. Or, your department may need software or hardware upgrades in order to efficiently operate the reporting or data mining features of the LMS. Take the time during the build out to get all of your internal hardware and software installed and tested.

Another part of what we will refer to as installation may be the internal training of your staff. Often part of the LMS contract is a certain amount of onsite or at least virtual, in-person training for the learning staff. This may include learning how to use the system as a learner, as an instructor, as a designer, and as an administrator. Be sure to schedule the training during the "down time" during the build out. Another task you can undertake during the installation phase is to determine the system access instructions and paths - with this information, you can begin building training and quick reference guides for the rest of the population.

One of the final areas of the installation is the initial and continuing population of data in the LMS. First, where is the initial and regular data for your training audience coming from? For example, will the HRIS transfer employee information regularly, or is this information scheduled for manual entry at certain time intervals? Be sure to schedule these data "runs" at the beginning of the LMS implementation to ensure that information housed in the LMS is always up-to-date. Also, consider how you will set up course "shells" and class schedules. Typically an LMS will require you to create the catalog of courses first, such as "Banking 101"

or "Customer Service Basics", and then create all of the class meetings and schedules. If this is the case, you will need to determine who is going to conduct all of the manual data entry that is required. Some organizations assign members of the training staff to do this, while others may leave this time-consuming set of tasks to the LMS administrator. Alternatively, hiring temporary workers to complete data entry is a possibility, although these people will have to be trained. As with any step during the installation phase, be sure to "test" data to ensure that it is uniform in entry and appearance. For example, after the first data transfer from the HRIS, locate records within the LMS to make sure that the data transferred correctly. For courses and classes, consider having users test the data by looking up a particular course and class meeting.

Once the LMS has been built, the next step in the implementation is User Acceptance Testing, or UAT.

User Acceptance Testing

A portion of your audience should test any large-scale technical system before it is rolled out to the general population, whether it is an LMS or even a core of online courses. In regard to the LMS, user acceptance testing (UAT) should really occur on two planes: end users and "back end" users, such as the learning and development organization. Let's look at how you can ensure that UAT occurs on both planes - and also some best practices for both.

One of the first sources for UAT information is your vendor. Set up a meeting with the vendor representative to find out how they would recommend testing the system. By the time you are ready for testing, your vendor should know your audiences, both internal and external,

almost as well as you do. The vendor may be able to provide sample scripts, testing areas, and project plans. In addition, your vendor should be able to create a "copy" of your LMS to be used for testing, instead of using the live database. When you've obtained information and assistance from your vendor, take the time to develop and customize the UAT process even further. Remember that your time spent on the front end will probably save both time and money in the long run.

The key to UAT is that the testing audience should be able to follow LMS processes from beginning to end, report on success (or failure), and make suggestions for any last-minute changes. Let's look at a potential UAT process for an LMS end user, who would be a training participant in your general population. The student should be able to locate his or her own record in the LMS, looking for correct employee data, such as name, position, or work location. The student should also be able to find a learning plan or career path that explains which courses he or she should take. You may also want the student to be able to find a learning plan or career path for a desired position, such as the next logical position for the person or even a promotion.

Next, the student should be able to locate a course and then find a class, either online, classroom, or both. The student should be able to register for a class - and then take it immediately if it is an online offering. If the class is a classroom offering, the student should be able to register, find the class location and time, and then go to the class when it is offered. If this is the case for your LMS, you will probably need to make the UAT period long enough to include a couple of weeks' worth of classes. After the student takes the course, he or she

should be able to again locate the record, find a grade or record of attendance, and make sure that credit has been posted on the learning plan or transcript.

On the back end, an LMS administrator should be able to find records of online courses immediately. This includes locating a grade as well as credit on the student's transcript or learning plan. For classroom courses, an instructor should be able to record attendance and grades, and then make sure that all grades go to the appropriate transcripts.

Another aspect of UAT should be your reporting and data mining function. You or your LMS administrator should be able to run all reports that were part of the original LMS package, and then cross check the information in the reports to what exists in class and student records. An additional step for the reporting function is to pass the reports to their audience, such as an executive, and have that person review the reports. The report end user should be able to locate information easily, draw relevant conclusions about the data, and ask questions regarding the data. If this doesn't happen, the reporting may not be complete or it may not be arranged in the most user-efficient manner.

The best way to create an efficient UAT process is to create scripts and feedback forms for the testers. To do this, think through LMS processes, as we've done here, and then create a written script. Have users follow the script, add their feedback, and make any suggestions for change that could occur either before the rollout or later on.

After the UAT process, you are ready to roll out. But a full-scale LMS rollout includes marketing, training, and technology, which we will examine in our final discussion on LMS implementation.

Training, Marketing, and Technology

When you've completed your user acceptance testing, it's time to implement a highly effective training and marketing program for the LMS. Remember that it's great to have the LMS up and running, but a lack of users and enthusiasm could spell disaster for the LMS and the training initiative. So how can you ensure that training and marketing entice the organization to jump on the LMS bandwagon?

Many times, your audience may be reluctant to log in and begin using the LMS simply because of a lack of knowledge. Obviously the technologically savvy users may jump right in and try to figure out how to use it, but others may not be so quick. The key to this issue is to provide useful training. As with any training program, the operative term in LMS training is "useful". Try to avoid training on the "nice to haves" or functions that don't really apply to certain segments of the population. For example, end users really don't need to know that much about reporting.

At this point, it's helpful to know that your UAT process has probably provided the best training materials. Take your scripts and turn them into quick reference guides (QRG's) for accessing and using the LMS. Make these QRG's available in both hard copy and electronic formats so that users can get to them quickly. And if your training department is large enough, don't forget about creating training materials for them, as well. You can conduct initial training for larger audience groups in person, online, or even via web conferencing. If your organization is already technologically advanced, consider adding the LMS to social media, such a blogs, discussion threads, or the organization's internal Web. The main thing to remember

when you are training for the LMS rollout is to have training materials ready to go, easily accessible, and certainly relevant to the population.

As training comes under control, you should also consider the marketing of the new LMS. Remember the population that may not access the LMS because of a lack of knowledge? There is potentially an equal population that may not access the LMS because they are unsure of how it can benefit them. In other words, just as your organization markets its products and services, you must market the LMS.

For end users, position the LMS as the best way to access and register for training. Show the audience that attending classes via the LMS has never been easier. In addition, and perhaps more importantly, you can position the LMS to the end user audience as an efficient way to manage careers. For example, an end user can access his or her learning plan, take classes, and find out what educational opportunities may exist to prepare him or her for the next career step. Not only this, the data collected in the LMS can be an effective way for employees to show progress when it's time for performance evaluations.

For managers, you can market the LMS as a tool for career development and management. From the LMS, managers can find out who has

taken required or job-related training, as well as who might be taking courses related to promotion. As part of the marketing, show managers how LMS data can help them create a succession plan - and ensure that those employees who are interested in promotion not only obtain training but also obtain the necessary professional development and coaching they would need to succeed. Don't forget the executives, either. Market the LMS as a tool for executives to discover which courses are being taken and which ones aren't. The executives can also look at attendance, grades, and even participant surveys to determine if training is hitting the mark.

One final part of marketing is to use the new technology itself as a tool. For example, you can position the LMS as a fantastic step forward in learning technology, a step forward that will allow the learning and development organization to become a strategic business partner. This partnership will allow training and its audiences to work together more effectively as new technology is added, ensuring that the organization consistently meets its goals.

As we've discussed, implementing an LMS can be a difficult task. But with the ten steps we've explored in this series, your LMS implementation can be effective, efficient, and successful.

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Bryant Nielson – Strategic Alliance & Acquisitions Director at [Financial Training Solutions](#) a division of [CapitalWave Inc](#) – offers 20+ years of training and talent management for executives, business owners, and top performing sales executives in taking the leap from the ordinary to extraordinary. Bryant is a trainer, business & leadership coach, and strategic planner for many sales organizations. Bryant's 27 year business career has been based on his results-oriented style of empowering.





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