



## Ten Steps to Successfully Selecting A Learning Management System

An Lguide Publication

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# Introduction

## Selecting an LMS: Get Ready for a Bumpy Ride

The typical Learning Management System (LMS) used to be a mere training registration system. Not any more. Over the past few years, LMSs (also known as training management systems and integrated learning solutions) have become full-scale enterprise software. Today's LMS launches e-learning courses and provides registration capabilities, automated course catalogs, competency management, assessment, resource management, tracking, and reporting. These systems have become popular because they can serve as the backbone of a company's learning and e-learning strategy.

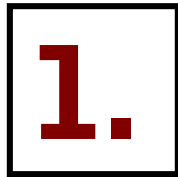
As LMS functionality has grown, so has the marketplace. With more than one hundred LMSs available, it has become increasingly difficult to distinguish between products and separate the reality from the hype. There are full-blown LMSs, externally hosted LMSs, portals with embedded LMSs, LMSs with external content, and smaller-scale LMS-like systems. Confusion reigns.

Here's some advice from someone who has gone through this selection process multiple times: fasten your seatbelts, and get ready for a long, frustrating, and bumpy ride. Selecting an LMS is a huge and challenging decision; perhaps the biggest decision you will ever make as a learning professional. LMSs are large, complex software programs that are changing rapidly, and they can cost a million dollars or more. The LMS purchase may also be the most visible decision you'll ever make.

This step-by-step explanation of how best to select an LMS assumes that you are about to embark on the selection process. Even if you are in the midst of making your selection, there will be tips that can help you midstream. We'll walk through 10 steps in selecting an LMS:

1. Determining Your LMS Business Requirements
2. Researching LMS Vendors
3. Conducting Vendor Demonstrations
4. Narrowing Down Potential Vendors for Consideration
5. Conducting an LMS Needs Assessment
6. Developing and Distributing the RFP
7. Preparing your Company for Change
8. Evaluating Proposals and Short List Vendors
9. Conducting Final Vendor Presentations and Selecting a Vendor
10. Negotiating the LMS Contract and Getting Ready for Implementation

So take a deep breath, and get ready to learn how to make the best selection possible.



## **Step One**

### **Determining Your LMS Business Requirements: The 12 Questions to Answer**

Of all the steps in the LMS (Learning Management System) selection process, determining your LMS business requirements is clearly the most important. Unfortunately, determining business requirements is also the step that many organizations don't really think through. That inevitably leads to poor decisions or backtracking during the selection process.

The decisions you make here should drive every other part of the LMS selection process. When you determine your LMS business requirements, you build the criteria for your LMS decision and develop the information you need to write a coherent Request for Proposals (RFP).

It may be tempting to jump right into vendor demonstrations or the RFP, but determine your business requirements first. It will help you maintain control of the process later.

To develop your business requirements, you'll need to answer the following 12 questions:

#### **1. What is the business need for the LMS?**

If you're considering an LMS, you probably have some business challenges you hope the LMS can fix. Take some time to solidify and formalize your sense of these challenges. Businesses often look to an LMS to solve challenges such as:

- Deploying learning enterprise-wide.
- Serving underserved learners.
- Automating training administration processes.
- Centralizing organizational learning while providing local ownership.
- Providing self-service learning for employees, third-party vendors, or customers.
- Deploying learning resources and training programs more quickly.
- Integrating incompatible systems for learning management.

#### **2. How will you measure success?**

Without metrics, you will not be able to determine your return on investment (and an LMS is quite an investment!). Consider what you will measure and how you will measure it. Your metrics should be determined by your business challenges—if your main business challenge is to serve underserved learners, you need to figure out how to measure that. Avoid the temptation of choosing simple metrics that don't connect with your business challenges.

### **3. What is your potential Return on Investment?**

By using the metrics above to calculate your potential ROI early on, you create a real business case for the LMS purchase. Many organizations find that the ROI provides justification for additional funding.

### **4. Who is the target audience?**

Determine who will use the LMS, the total number of users, and their locations. Once again, these answers should grow out of your business challenges.

### **5. What initial pilot groups can provide an early win?**

In my experience, the most successful strategy for implementing an LMS is through a series of carefully planned pilots. Determine which users or business group(s) would make for an ideal pilot. When designing pilot projects, choose users who can provide an early win for the project. These users often have the following characteristics:

- Immediate business need for the LMS or e-learning delivered via the new learning platform
- A variety of ways to access the LMS
- A work environment that is conducive to learning
- Management or organizational policies supporting learning at work

### **6. Who are your project stakeholders and what are their expectations? Who will be the key sponsor of this project?**

Identify who in the organization has a key stake in the LMS selection and implementation. Don't forget to identify your Information Technology (IT) stakeholders—they are critical to both the selection and implementation process. Find out at this point what your stakeholders need and expect. Determine who will be the overall project sponsor. Ideally this should be a senior manager who has influence with the stakeholders and the organization as a whole.

### **7. What are your functional and non-functional requirements for the LMS?**

This is the most time-consuming component of the LMS business requirements analysis. You need to determine the specific functional and non-functional features your organization needs in an LMS. Like every other part of the LMS process, the functional and non-functional requirements should grow out of your assessment of your business challenges.

Getting a good sense of your requirements will help you determine whether you will need an LMS or an Integrated Learning System (ILS). An ILS is a LMS with additional functionality typically not found in a basic LMS, such as authoring tools, content management, and knowledge management.

You shouldn't schedule vendor demonstrations until you've solidified these requirements. Otherwise, you may schedule obviously unsuitable vendors, wasting their time and yours. Work with your identified stakeholders to determine what you need in each of the following categories:

## **Functional Requirements**

- Content and curriculum management
- Registration
- Class scheduling
- Course delivery
- Competency management
- Assessment, testing, and evaluation
- Compliance, certification, and accreditation
- Resource management
- Inventory management
- Finance administration
- Content authoring
- Content management
- System administration
- Reporting
- Ability to define user roles within the LMS
- Ability to define user profiles
- Ability to set up learning home pages

## **Non-Functional Requirements:**

- Performance requirements
- User interface considerations
- Business domains
- Global access and functionality
- Application and database management
- User and system documentation and training
- Security and audit functions
- Flexibility and scalability

## **8. What are the key user roles and their functional requirements?**

One of the key features of the LMS is the ability to delegate roles to individuals throughout the firm while still retaining security and data integrity. This sophisticated permissioning ability allows the individuals closest to the business or learning program/material to maintain that environment. Determine these roles within your organization and what functionality each role needs to have (note that one individual can play multiple roles in the learning administration process):

- Catalog Administrator
- Course Scheduler
- Registrar
- Systems Administrator
- Finance Administrator
- Instructor or Facilitator
- Competency Specialist
- Accreditation and Certification Administrator
- Inventory and Distribution Specialist
- Learner

- Manager, Coach, or Mentor
- Instructional Designer
- Content Author
- Content Manager

## **9. What are your technical requirements?**

Work with your IT partner to define the technical requirements. Technical requirements typically include:

### **Architecture and System Requirements**

- Scalability requirements.
- Networking, hardware, software and operating systems the LMS needs to support.
- Client workstation specifications. Ability to support plug-ins, applets, or additional software on the client workstation.

### **Interoperability Requirements**

- Needed compliance with SCORM (Shareable Courseware Object Reference Model), IEEE (Institute of Electrical and Electronics Engineering Learning Technology Standards Committee) AICC (Aviation Industry CBT Committee), IMS (Instructional Management System Global Learning Consortium) standards.
- Needed MAPI, OLE, TCP/IP, and ODBC functionality. Your IT partner will need to assess these requirements.

### **Systems Integration Requirements**

- Needed integration with HRIS/HRMS, finance systems, e-mail systems, and other third-party systems.

### **Security Requirements**

- Security standards for work and remote use.

## **10. Who manages the LMS within your organization?**

Determine whether the LMS will be managed: Through central and local co-ownership by the training function(s).

- Centrally by training function
- Centrally by the Information Technology department.
- By another method.

## **11. What are the phases for LMS implementation?**

You should consider phased implementation for users and LMS functionality. Especially if your organization is new to self-service learning or e-learning, a phased implementation is recommended. This allows users to gradually get accustomed to the functionality the LMS can provide.

Determining implementation phases up front is also critical to the LMS selection. You may find an LMS product you particularly like, but it may be lacking some of the functionality you require. Knowing how you will phase in functionality for learners, managers and administrators will help you prioritize your immediate needs and allow time for customization of the application.

## **12. Who will be on your LMS Selection Project Team?**

If you don't yet have a selection team in place, put one in place now. Be sure that team members understand their roles and responsibilities in the selection process. Consider having a meeting to officially launch the project and initiate the steps in the selection process. Members of your team should include:

- The project sponsor (involved at a high level).
- Key stakeholders across the business units implementing the LMS.
- IT partners.
- Members from all training functions implementing the LMS.

Defining business requirements can take a few weeks to a few months. Take the time your organization needs to do it right. It will pay off in the long run!

# 2.

## Step Two: Researching LMS Vendors

Once you've determined your business requirements, you're ready to research LMS vendors.

### Determining functional criteria

First, review your functional and non-functional requirements and determine what high-level functionality you need. These high-level functionalities will become your initial criteria for screening LMSs. Try not to get lost in the details of the functionality during this process. You want to develop a relatively concise list of broad functional criteria, not a long list of detailed concerns. For example, a high-level functionality would be "Competency Management," not "the ability to import existing job roles, job families and competency from HRIS system." You will have the opportunity later in the selection process to get into the details.

The criteria you identify should be the LMS features that are not typical to all LMSs. For example, all LMSs have registration functionality but not all have competency management. Most LMSs support e-learning course delivery and tracking but not all support both e-learning and Instructor-Led Training (ILT). Typical screening criteria often include:

- Competency and skills management
- Certification and accreditation management
- Support of both ILT and e-learning course delivery and tracking
- Built-in assessment and testing tools
- Built-in content authoring tools
- Content management
- Global access and functionality (multiple languages, time zones, and currencies)
- Support of third-party collaboration learning tools
- Multiple business domains that allow for custom views and business rules for different populations
- Scalability
- Various kinds of standards compliance
- Connectivity with ERP (Enterprise Resource Planning) systems
- Company viability and other business concerns

### Organizing your research

Next, create a simple LMS Product Screening Matrix. This may seem obvious, but you'll be bringing in a lot of information about vendors, and the matrix will both help you focus on your criteria and help you keep track of the data. You'll also use the matrix later to determine the match between your needs and vendor products. As you research products,

fill in the matrix by checking off the screening criteria the LMS product supports. At this point your matrix could include 15 or more vendor products. And here's a little secret—you probably won't find an LMS product that will meet all your screening criteria. Not to worry. This is very typical. It is nearly inevitable that you will either compromise and give up functionality or customize the application.

Your LMS Product Screening Matrix should look something like this:

<b>Vendors</b>	<b>Criterion 1</b>	<b>Criterion 2</b>	<b>Criterion 3</b>	<b>Criterion ...</b>
<b>Vendor 1</b>	notes	notes	notes	notes
<b>Vendor 2</b>	notes	notes	notes	notes
<b>Vendor 3</b>	notes	notes	notes	notes
<b>...</b>	notes	notes	notes	notes

### **Researching LMS vendors and products**

You can get started on LMS research in a number of ways:

- Read industry publications and online newsletters.
- Attend industry conferences. Purchase industry research reports.
- Call friends and colleagues in the industry.
- Use Lguide's Learning Management System Focus Room at [www.Lguide.com](http://www.Lguide.com). It provides a variety of information and links to LMS resources.

Vendors' marketing materials are notoriously difficult to understand. To distinguish between reality and hype you will need to contact the vendor. When you talk to the vendor, it can be difficult to remain focused on your criteria--it's easy to get distracted by the vendor's sales pitch. Following a few simple guidelines can help you retain control of the process:

- Find out who your Account Executive (AE) is and contact that individual. At some point you may want to further investigate their product, so it's a good idea to start the relationship with your AE now.
- Tell the AE that you are in the exploratory phase of the selection process and you need some additional information about their product.
- Ask the AE if their LMS product, **out-of-the-box**, has the top line functionality you identified as your screening criteria. Most vendors will say that their product can do almost anything, but many times that means **with customization**. Ask direct questions and expect direct answers.
- The AE will probably offer to come into your organization for a demonstration. Since it is too early to determine if they are a viable contender, graciously decline and let the Account Executive know that you will contact him should a demonstration be needed.

## **Narrowing the field**

Once your LMS Product Screening Matrix is complete, review the results and remove unsuitable vendors from consideration now. The vendors that have the most criteria checked off are obviously those that you should bring in for demonstrations, but there are some exceptions to this rule. For example, there may be a product that is favored by your organization that you will want to investigate, at least for political reasons. Your ERP (Enterprise Resource Planning) vendor might fall into this category. Or you may have vendors that meet all of your most important criteria, but don't meet some less critical criteria--you may be able to get third-party vendors to solve those problems.

# 3.

## Step Three: Conducting LMS Vendor Demonstrations

Now that you have determined which Learning Management System (LMS) vendors to bring into your organization for product demonstrations, it's time to schedule them. Unfortunately, scheduling vendor demonstrations isn't as simple as whipping out your datebook and penciling them in. To get the information you need from vendor demonstrations, you'll need to do some planning. Here are some steps to follow:

### 1. Decide who will attend the product demonstrations.

Ideally, everyone who will be involved in the selection process should be involved. This will allow everyone on the selection team to have the same foundation of knowledge about the vendors. If you don't get everyone to come to the demonstrations, you may find yourself bringing in one or more vendors multiple times.

Be sure to have an IT partner present at all vendor product demonstrations. This may be a big commitment for one individual, so you may want to have two or more members of your IT Department share in the responsibility.

### 2. Set expectations with the selection team on the time commitment required for this step in the process.

You should plan for each demonstration to be approximately two hours. That includes 1 1/2 hours for the vendor demonstration and half an hour for the selection team to debrief.

Depending on your target selection date, you will need to decide how aggressive your product demonstration schedule needs to be. If you are considering 6 or more vendors, this step in the selection process can realistically take two months due to your selection team's other work commitments.

### 3. Schedule the product demonstrations.

Contact each of the vendors under consideration and schedule the demonstration. When scheduling gets difficult, you may want to consider telephone demonstrations.

### 4. Prepare for the product demonstrations.

Before the meeting, give the vendor your functional and non-functional requirements so they have a clear understanding of your needs. Also ask each vendor to give your selection team marketing materials well before the meeting, and ask the vendors to refrain from their standard dog and pony shows. You can read their marketing materials or visit their website on your own--a marketing presentation is not a good use of your team's time. Let the vendors know that you want the meeting to focus on the demonstration.

Also find out if there is an online demo site your selection team can visit before the demonstration. If your team can look at the marketing materials and the demonstration site before the vendor's presentation, they'll be prepared to ask the right questions and get the information they need.

## 5. Conduct the product demonstrations

Be sure that the vendor demonstrates the functionality of both the Learner and Administrator views of the system. To avoid a standard pitch that doesn't respond to your requirements, you should walk through the functional and non-functional requirements with the vendor. At the same time, have a member of your team documenting the out-of-the-box functionality of the vendor's product.

Some additional areas to explore with the vendor are:

- **Interoperability.** What is the product's current level of compliance with SCORM, IEEE, AICC and IMS standards?
- **Enterprise Resource Planning (ERP) integration experience.** Can the LMS import HR data from ERPs and other databases?
- **Vendor support with integration and customization.** What level of support does the vendor provide for integrating third-party courseware and customizing the application?
- **Implementation experience.** What is the number of full-scale implementations to date?
- **Strategic partnerships.** Who are the vendor's strategic partners? Can the vendor provide some specific examples of how these partners have provided value-added services for their customers?
- **Approximate investment.** What is the vendor's licensing and pricing model?

End the demonstration by setting the vendor's expectations. Tell the vendor how you will proceed and when you will contact them.

## 6. Conduct a debriefing after each demonstration.

Don't count on your team's memory to recall each product weeks or months after the demonstration. After the vendor leaves, take 15 - 30 minutes to discuss your observations. Review the functional and non-functional requirements and determine the overall strengths and weaknesses of the product. Document your observations. Also document any other questions or concerns you may have—you can get the vendor to answer them later.

# 4.

## Step Four: Narrowing Your List of Vendors

It is very common for organizations to start the LMS selection process by looking at a large number of vendors, but at some point, you must narrow the list. Chances are, after many LMS product demonstrations, there are a smaller number of vendors under true consideration. Before you send out and process RFPs, it makes sense to eliminate vendors who clearly don't fit your criteria.

After the product demonstrations, it's time to return to your functional and business requirements and narrow the vendor list.

### **Determine which vendors meet the majority of your functional and non-functional requirements.**

As a result of your vendor demonstrations and any follow-up phone calls to vendors, you should have a pretty good sense of how each vendor can or cannot meet your functional/non-functional requirements. Keep in mind that it is highly uncommon for any one vendor to meet all your needs out-of-the-box. Compromise and some level of customization are inevitable. Create a list of vendors that appear to have met most of your needs. (Add your ERP vendor to this list even if their product may be inadequate for your needs; see below.)

### **From that list, assess technical fit with your needs and technical environment.**

Don't be surprised if the vendor product that appears to meet the majority of your needs is not a suitable fit in your technical environment. You may also find that some vendors do not have the level of integration experience required for your project. It's difficult to get around "technical fit". Vendors can promise that they can do anything to make their LMS fit in your technical environment but remember; this may mean that your organization becomes their guinea pig. If it appears that none of the vendors are a technical fit, you may need to go back and look at the vendors you eliminated due to a lack in functionality.

### **Only eliminate vendors whose cost is completely "outside the ball park."**

It can be very tempting to shorten your list by eliminating the higher cost vendor(s). Unless the vendor is completely out of your target budget range, don't eliminate them yet. There is a lot to be said for negotiation and many vendors have pricing flexibility. If many of the vendors are far outside your range, it may be because you have truly underestimated the investment required for your project. You may need to obtain additional budget or cut back on your specifications.

### **Keep your ERP vendor under consideration.**

It is a professional courtesy to keep your ERP vendor (if you have one) under consideration throughout the entire selection process. It shows stakeholders in your organization that you have kept your mind open to the ERP vendor's solution and are performing your due diligence. If the ERP vendor cannot meet your needs they will either withdraw from the RFP process or it will be apparent in their RFP response.

### **Consider your team's "overall feelings" and "gut" reaction.**

Don't underestimate your selection team's instincts and reactions to particular vendors. Vendors are on their best behavior during the business development process—if they're not easy to work with during the demo, they certainly won't be easy to work with later. Don't expect behavior or attitudes to change once you sign a contract. If the vendor was unwilling or unable to answer questions or provide information to members of your team, that's a red flag. For an LMS implementation to be successful, the vendor's organization will need to work very closely with yours. If you believe that a partnership may not be positive, you need to factor that in now before you move to the RFP process.

Narrowing down your vendor list can provide your selection team with a sense of progress and accomplishment. It will also allow your team to become more focused for the remaining steps in the selection process.

# 5.

## **Step Five: Conducting an LMS Needs Assessment**

### **What is an LMS needs assessment?**

An LMS (Learning Management System) needs assessment is a data collection and analysis process that aims to surface the specific LMS requirements for a successful implementation in your organization. Determining your LMS business requirements sets the broad parameters for the LMS project, but the LMS needs assessment goes to a more detailed, practical level. The result is a document that outlines the functional and technical requirements for your LMS and the implementation barriers your organization could face.

In order to design an LMS solution that will meet business needs your assessment should include data collection in the following areas:

- Organizational Culture and Business Requirements
- Training and Learning Practices/Culture
- Business Rules and Processes
- System Integration
- Technical Requirements

No matter how the assessment is conducted, you also need to involve the right people from your company. Include:

- The project sponsor
- The project sponsor's manager
- The LMS selection team
- Selected members of the training/learning function (including administrators)
- Selected representative from all your business units
- IT resources

### **When should you conduct an LMS needs assessment?**

In my experience, the most successful LMS implementations are those that conducted their assessment before the RFP process. The data provided during this assessment helps to refine the identified business requirements and further ensures that the right LMS product is chosen. However, there are instances where it may be more appropriate to conduct the assessment after vendor selection as a method to further define the specifications of the project.

### **Who should help you conduct an LMS needs assessment?**

You can conduct the assessment yourself with input from vendors under consideration. (Have the vendors under consideration submit the questions they would ask if they were conducting the assessment). Your organization conducts the interviews and provides the

raw data to vendors during the RFP process. Be sure to tape record and transcribe the interviews for the best success with this option. However, if you don't have the time or resources to do this, consider getting some help. There are a number of options:

- Have one of the vendors under consideration conduct the assessment. Consider paying the vendor so you own the rights to the assessment and you can share the findings in your RFP.
- Have all the under consideration vendors conduct an assessment. (This is not recommended as it is repetitive and time consuming for your stakeholders.)
- Hire an independent consultant to conduct assessment (This approach provides a third-party, independent view.)

If you're considering hiring a vendor to help with the needs assessment, keep in mind that different vendors have different terminology and use different methodologies for conducting an assessment. Some vendors conduct a "service estimate" as part of the business development process to help assess the needs and cost of the LMS, while others conduct an assessment after they have been selected as the vendor to further define what is required.

One potential drawback to hiring a vendor to do the needs assessment is that many LMS vendors tend to focus their assessments only on technical specifications and issues. Because the success of an LMS implementation rests on many other influencing factors, technical data provides only a small snapshot of LMS needs and requirements. If this should occur with the consultant or vendor you select to conduct the assessment, you should consider this a red flag and an indication of how they will lead the LMS implementation.

### **What are the benefits of an LMS needs assessment?**

Even though your organization may have done some thorough analysis to define your business requirements, an assessment can benefit your LMS selection team in a number of ways.

- **Validating business requirements**

An assessment can serve as a validation of the work your LMS selection team has performed. By engaging an expert in the process, it can provide peace of mind in knowing that you have thoroughly examined the business requirements and have identified the type of application that will best support your vision. Vendors or consultants who specialize in these learning applications are experts in the technology and will make sure that all your technical and functional needs are clearly defined.

- **Estimating costs**

One of the greatest variables during the selection process is cost. An assessment can help to identify all the factors that will impact your LMS investment. This will help you determine if tradeoffs need to be made or if your estimated budget is realistic given your requirements.

- **Determining internal vs. external hosting**

The assessment can gather the appropriate information to determine the advantages and disadvantages of external vs. internal hosting arrangements.

- **Increasing stakeholder involvement and commitment**

The assessment provides stakeholders the opportunity to look into the future and provide their perspective and concerns about the project. The data gathered not only informs the selection process, but provides value during implementation. One of the

greatest benefits your organization can derive from an LMS Needs Assessment is ensuring that all stakeholder views and concerns are represented and addressed.

- **Evaluating vendor approach and deliverables**

There are a number of options for who conducts the needs assessment, which will be outlined later. Should you decide to conduct the assessment with one or more of the vendors under consideration, the LMS Needs Assessment can provide your selection team the opportunity to evaluate the quality of the vendor's deliverables. Better to learn the quality of their work now, than later on in the project.

### **Moving on to the RFP**

Once you have the results of the needs assessments, consider including them as part of the RFP. This will provide vendors with very rich data about your organization which will hopefully lead to more targeted responses.

The LMS assessment often is the turning point during the selection process. It provides motivation, obtains commitment, and validates the direction of the initiative.

# 6.

## **Step Six: Developing and Distributing the Request for Proposal (RFP)**

Putting together an RFP can be a daunting task. The RFP needs to be carefully developed to insure that you will receive all the information you need from prospective vendors. The key is to start developing the RFP early in the selection process and to make it a dynamic, living document that is refined as the selection process unfolds. You should start the RFP right after Step One: Determining your LMS Business Requirements

This section focuses on the content of the RFP. Even if your organization already has a formal RFP process, the information here will ensure that you get quality responses. If you don't have a formal process in place, remember that you need to be fair, impartial, and consistent.

So, what should be included in the RFP? Below is a sample Table of Contents for an LMS RFP, with a description of the RFP and some sample questions:

### **1. Introduction**

In this section, you provide the vendor with the background information required to help them understand the needs of the project, including:

- Company Background
- Purpose
- Implementation
- Background Information
- Assumptions
- Constraints and Relevant Facts

### **2. General Proposal Conditions**

This section outlines your proposal conditions and information on the selection process, including:

- Mandatory Qualifications
- Preparation Costs
- Timetable
- Confidentiality and Publicity
- Return Address
- Questions
- Selection Process
- Proposal Rating
- Reference Check

### 3. Proposal Response Format

Here you give the vendor directions on formatting of proposals.

### 4. Functional and Non-Functional Requirements

This section provides the vendor with a complete list of your prioritized functional and non-functional requirements.

### 5. Technology

This section asks the vendor to provide information in four main categories: Architecture and System Requirements, Interoperability, Systems Integration, and Security. Sample questions might include:

- **Architecture and System Requirements:** Describe your overall system architecture. Please include a visual that includes each component of your system. Describe all the networking, hardware, software, and operating systems your product supports. Be very specific and include version numbers.
- **Interoperability:** Describe the current level of compliancy for SCORM, IEEE, AICC and IMS standards. What outside organization, if any, has assessed this compliance?
- **Systems Integration:** Describe the APIs that exist in your product that facilitate integration with other systems such as HRIS, financials, e-mail, etc.
- **Security:** Describe how security is handled, both across the firewall and with users outside the firewall.

### 6. Implementation

This section asks the vendor to provide you with information in three main categories: Implementation Experience, Project Management, and Application Service Provider vs. Internal Hosting. Sample questions might include:

- **Implementation Experience:** What is the number of full-scale implementations of your product to date?
- **Project Management:** What project team resources are expected from our company?
- **Application Service Provider vs. Internal Hosting:** Based on your knowledge of our company and our needs, what are both the advantages and disadvantages of the ASP option?

### 7. Customization and Professional Services

This section asks the vendor to provide information in three main categories: Customization, Training, Ongoing Technical Support and Maintenance, and Professional Services and Strategic Alliances. Sample questions might include:

- **Customization:** Describe your philosophy around product customization.
- **Training, Ongoing Technical Support, and Maintenance:** What training does your company provide for the project team, administrative users of the system, other users of the system, and our Information Technology resources? Describe the types of

service level agreements that you have undertaken with other organizations for both the ASP and internal hosting models.

- **Professional Services and Strategic Alliances:** In addition to implementation support, what consulting services do you provide (without added cost to the project)? Provide a list of your company's strategic partners and specific examples of how these partners have provided value-added services to your customer projects.

## 8. Value Proposition

Here you ask the vendor to provide information including: Your Company, Competitive Analysis, and Value. Sample questions might include:

- **Your Company:** Is your firm publicly traded? (List date, symbol, and exchange). What is the percentage of stock owned by insiders? If private, describe your financial resources.
- **Competitive Analysis:** Who do you consider your top competitors? Provide a competitive analysis comparing both your product and services to your top competitors.
- **Value:** Why should we work with your company? What unique value will your company provide?

## 9. Investment

This section includes one main category: **Pricing**. A sample question might be: What is your company's licensing and pricing model? Please be specific.

You may also want to use the assessment results from the LMS Needs Assessment you conducted in Step 5 to provide vendors with additional information that will impact their response.

Once the RFP is complete, be sure to have it reviewed internally (by the project sponsor or key stakeholders) to insure that it accurately reflects the needs of the project. This is also a good time to inform vendors when the RFP will be distributed and when their proposals are expected (a two-three week timeframe is usually fair).

Once the RFP is approved, distribute the RFP to the narrowed down list of potential vendors you determined in Step 4. Again, be sure to manage the RFP process in a way that is fair and consistent for all vendors.

# 7.

## Step Seven: Preparing Your Company for Change

You may be asking yourself, "why is 'preparing your company for change' an action step in selecting a Learning Management System?" The answer is simple: if you don't start now, all your selection efforts could go to waste.

Implementing an LMS is unlike implementing other types of company system applications. The LMS's added functionality and innovation provide you and your organization with the unique opportunity to look toward the future and embrace new learning strategies. Since an opportunity like this doesn't come along too often, it's one you want to capitalize on.

Let's start by taking a look at learning past and future. LMS technology can help facilitate these cultural changes as long as your business environment supports the transition.

Learning Past	Learning Future
Company- or manager-directed	Self-service with accountability
One size fits all	One size fits one based on competencies
Waiting for scheduled training events	On-demand learning; Just when I need it
Access by some	Access by all
Slow response to market/business changes	Proactive and rapid response to business environment
Learning is an HR tool	Learning as a competitive weapon
Learning content is static	Learning content is changing as quickly as products and services
Little accountability for training investment	Demand for greater ROI
Little training variety	Diverse learning resources

So, why change management? An LMS puts the power of learning at the learner's fingertips, but it doesn't ensure that learners will use the LMS. You have to do that.

### Factors to Consider

If your LMS project is to be successful, the project scope must include change management. When embedding an LMS into your business, you must consider:

#### The Learning Culture

Assess your learning culture to determine appropriate strategies to get from the current to the future state of learning. Consider whether your employees have the appropriate learning environment, the policies needed to support continuous learning, and the incentives to learn online.

## **Business Processes**

Your organization's business practices must be aligned, created, or revised to support the LMS. The LMS implementation impacts the roles of the learner, manager, and all learning professionals in your organization.

## **Learning Content**

Your learning offerings must be migrated, converted, or created and mapped to organizational and/or job competencies. For managers, employees, and the organization to consider the LMS a valuable learning resource, it must have a full variety of quality learning content relevant to all roles in the organization.

## **Starting the Change Process**

Here are some ways to start the change process:

### **Adapt a clear, purposeful vision for your learning culture.**

Determine how the LMS can activate this vision. Ensure that the vision is compelling enough to increase stakeholder openness to change. Consider:

- What type of learning culture do you want to create in your business?
- What aspects of your current learning culture do you want to keep?
- What aspects of your current learning culture do you want to change?

### **Assess the gap between your current learning state and your business's desired learning state.**

Create a "Learning Past/Learning Future" table for your business. Consider conducting a learning assessment through focus groups and other data collection methods to clearly understand your current learning culture.

### **Discover what will stand in the way of creating the desired learning culture.**

Create a force-field analysis diagram, which identifies the restraining forces or barriers and the driving forces for change.

### **Determine what will drive change in your business.**

Given the restraining forces identified, what will you need to do to drive change in your business? Consider the changes that will be required in processes, procedures, roles and the environment to drive LMS/E-learning success.

### **Keep senior management on board.**

The support of senior managers is essential for change in your organization's learning culture. Senior executives must see that e-learning is a way to meet corporate objectives and close business critical skill gaps.

# 8.

## Step Eight: Evaluating Proposals and Short-Listing Vendors

You've sent the Learning Management System (LMS) RFP to vendors, and you're waiting for them to respond. How can you use this time to gear up for evaluating the proposals?

Here are the next steps to consider:

### **Establish an evaluation team and process.**

If you already have an LMS selection team in place, then you are well on your way to having an evaluation team. But consider whether your selection team has the authority to make the final LMS decision in your organization. If your organization is like most, you will need a higher-level approval. It is usually the project sponsor and other executive stakeholders that will ultimately approve or veto the evaluation team's short-list selection. Make sure you're clear on the decision process, and set up the lines of communication now.

### **Schedule an evaluation team meeting to discuss your evaluation process and schedule.**

The evaluation team needs to establish a clear process and schedule for proposal evaluation. During this time, you should set expectations about the appropriate amount of time to expect and budget for the proposal review and scoring process. The average proposal is at least 50 pages and could be as long as 200. Plan for each proposal to take approximately 2 hours for review.

During this meeting, the evaluation team should also create evaluation criteria and weighting for each criterion. Because evaluation criteria will not be considered equal in the evaluation process, you need to figure out how to weight criteria to reflect your priorities. For example, if the ability for the vendor to meet your functional/non-functional requirements is most critical, you may want to apply a higher weighting to this criterion.

Here is a list of some typical criteria:

- Functional/non-functional requirements
- Implementation experience
- Pricing
- Vendor value proposition (e.g., company stability)
- Customization and professional services
- Technical fit

Once the categories and weighting are determined, a member of the team should create a spreadsheet with criteria, ratings, and weightings. Evaluators can use the spreadsheet as they review each proposal. The spreadsheet will also help you translate your qualitative review into a quantitative vendor score that can be compared with others.

### **Provide the executive evaluators with your schedule and an overview of the short-listing process.**

Once the evaluation team determines its process and schedule, executive evaluators need to be informed. This is also an opportunity for the executive evaluators to review and revise the weightings given to the evaluation criteria identified. Executive evaluators will also need to know how much time they will need to devote to the evaluation process.

### **Distribute the proposals and the scoring spreadsheet to the evaluation team.**

By the time you've set up the evaluation criteria and schedule, the proposals should be back from the vendors. Distribute the vendor proposals and score sheets to the selection team. Provide an online copy of the score sheet for automatic scoring. Also, if pricing is not one of the three highest weighted criteria, consider removing the pricing information from the proposals before you distribute them. This will ensure that the vendor is truly evaluated on their solution and not the cost of the solution. Remember, price can always be negotiated.

### **The evaluation team reviews the proposals.**

The evaluation team now reviews the proposals based on the agreed-upon schedule.

### **The evaluation team meets to share their evaluations and create a short list.**

Probably the most efficient method of sharing evaluations and creating a short list is to have team members submit their score sheets prior to a team meeting. The project leader should compile the scores to determine a ranking of vendors, noting any major areas of disagreement between evaluators. The meeting time can then be used to further discuss proposals, iron out contradictions, and confirm the short list.

### **Pass the recommendations on to executive evaluators for approval or veto.**

Now that the evaluation team has determined the short list, the Project Leader should bring the team's recommendations to executive evaluators for approval. Be prepared to share detailed vendor scores with executive evaluators. Having a visual presentation summarizing the scoring data would also be helpful.

### **Notify short-listed vendors of next steps.**

Once the short list has been approved or revised, vendors should be notified to either inform them that they did not make it to the next step in the process or if they did, to inform them of the next steps. (My recommendation: a final vendor presentation.)

## **The Next Step: Final Vendor Presentations**

Finally, you may be asking "do we need to short-list or can we just make a selection now?" If only one vendor appears to meet your needs, then there may not be a need to move forward with this step. But chances are you have more than one vendor still under consideration. Having a final vendor presentation provides you with the opportunity to:

- Ask the vendor the questions they did not respond to in their proposal (and this will happen!)
- Provide the vendor with a case study (representing a real LMS issue your team is grappling with) to respond to in the presentation.
- Further test your chemistry with the vendor.
- Perform a final comparison of vendors.

# 9.

## **Step Nine: Conducting Final Demonstrations, Checking References, and Selecting a Learning Management System (LMS) Vendor**

You have now short-listed your vendor candidates and you are ready to move forward in selecting your LMS partner. Vendor presentations at this step in the selection process allow you to learn more about the vendors under consideration and be sure that you learn everything you need to know in order to make an educated decision. It is critical that the entire LMS selection team is present for these presentations.

### **Conducting Vendor Presentations**

Because you are going to have different issues questions and concerns for each vendor, the format of each vendor presentation should be customized to ensure that your issues are appropriately addressed. Many organizations conduct these presentations at the vendor's site instead of their own. Although you may not be able to bring your entire selection team to an off-site presentation, presentation at the vendor's site allows you to:

- Get a better feel for the vendor's organizational culture.
- Meet additional vendor resources that you could potentially work with.
- Tour the vendor facility to view key functions that you would interact with during implementation.

Be sure to evaluate or debrief each vendor presentation as quickly as possible after the vendor presentation, while thoughts are fresh in the minds of selection team members. You may want to use an evaluation form to help you gather consistent feedback.

### **Checking Vendor References**

After the vendor presentations, but before meeting with the selection team to select your LMS partner, you should conduct vendor reference checks. It is advantageous to check these references prior to making your selection, but you may meet with some resistance. Many LMS vendors are reluctant to provide client references before they have secured your business. It is important that you hold your ground here and let the vendor know that you cannot make a selection without checking references. The reference-checking process also is a great opportunity for you to collect some implementation best practices that will help you down the road.

You should check at least two client references for each of the short-listed vendors. Here are some questions to consider asking:

- Which LMS vendors made it to your short-list during your LMS selection process? Why?
- Why did you ultimately select this vendor?
- Please describe your implementation. Was it local, regional, global? How many users were there?

- In your initial project plan, how much time did you allow for your full implementation? How much time did the implementation actually take?
- Did implementing the LMS cause you to change how you conduct your business? How flexible were the LMS's business rules?
- How did you roll out your LMS? Full implementation of all functionality? Phased implementation of functionality? Full implementation to all users? Phased implementation to some users?
- Did you use the vendor's professional services or any other consultants in your implementation process?
- What was the biggest surprise you encountered during the implementation?
- Which implementation task did you underestimate in terms of time and resources?
- If you were to do this all over again, would you select a different vendor? Why?
- If you were to provide one piece of advice in working with this vendor, what would it be?

### **Making your Final Selection**

At this point you should feel that you have thoroughly investigated all of your short-listed vendors and are prepared to make your selection. You should remind your selection team and other company decision-makers to take the following criteria into account:

- The overall match between the vendor products and your business requirements
- The technical fit of each LMS product
- The quality of the vendor proposals
- The investment required
- The ability of vendors to meet your implementation schedule
- The quality of the vendor resources and strategic alliances
- The chemistry between your organization and the vendors' organization

Many organizations select two vendors, a first choice and runner-up, just in case you and the preferred vendor cannot reach an agreement during contract negotiation.

## Negotiating the Learning Management System Contract

With all the effort and due diligence you and the selection team put into making a selection, you would think that the contract negotiation and signing process would be relatively straightforward and painless. Guess again! This is where the fun truly begins.

In my experience, it takes anywhere from three weeks to two months to effectively negotiate an LMS contract. Why so long? An LMS is a significant software investment that almost always requires some level of customization, and like any big project, there will be intricacies that need to be ironed out in the contract.

### What the Contract Typically Contains

You can expect the LMS contract to be between 25 and 35 pages. Below is an example of the terms you should expect to see outlined in the contract:

- **Delivery and License** (delivery, data conversion, grant of license, limitations of license, source code escrow)
- **Disaster Recovery** (alternative sites, disaster recovery sites and procedures)
- **Documentation**
- **Training** (product training, supplemental training)
- **Term and Limited Warranties** (warranty of title, warranty against infringement or encumbrances, current version, conformance to documentation, warranty against disablement, exclusions)
- **Software Maintenance** (term, renewal, services to be provided, response priorities)
- **Indemnification** (intellectual property indemnification, indemnification against personal injury and property damage)
- **Limitation of Liability** (limitation of liability, exceptions from liability)
- **Payment** (payment, taxes, continued performance, audits, out of pocket expenses)
- **Confidential Information** (treatment of confidential information, exclusions)
- **Proprietary Rights** (ownership of products, copyright notices)
- **Modifications to Product made by Client Organization** (right to modify source code, assignment of rights)
- **Termination** (default, election of remedies, survival of provisions, vendor default)
- **Insurance**
- **Miscellaneous Provisions** (notices, bankruptcy rights, relationship of the parties, non-exclusivity, successors and assigns, severability, publicity, compliance with government regulations)
- **Statement of Work** (description of planned implementation, systems integration, pilot strategies, consulting services)

## Contracting Best Practices

Now a few words of wisdom. In my experience, most standard LMS contracts are not specific enough to ensure that you will get the product and service you need. When negotiating your contract, be sure it includes specifics in the following areas:

- **Functionality requiring customization with and without cost**

Be sure that the contract specifies which functionalities will be customized without cost to your organization. If some of the customization will carry an additional cost, the contract should include an estimated cost range.

- **Hosting Arrangements**

If your organization has selected the ASP option, be sure that the contract clearly specifies who is ultimately responsible, because many LMS vendors use third-party hosting services. You should determine if it is necessary to enter into a separate contract with the hosting service.

- **Additional Professional Services**

If the LMS vendor has agreed to provide you with consulting services, (for example, business analysis, marketing, or change management), be sure that the scope of the work, the vendor resources provided, and the associated costs are clearly outlined in the contract.

- **Handling of press releases and industry announcements**

This can be a sticky situation. Vendors typically want to announce their new relationship with your organization and use your company name on their client list. If your organization has policies around this sort of promotion, be sure that they are clearly expressed in the contract.

Contract negotiation can be a trying period given the need to move forward with implementation. If you set expectations and plan accordingly, you won't be disappointed.

# 10.

## Step Ten: Getting Ready for Learning Management System Implementation

While your LMS contract is in negotiation, start getting your organization ready for implementation. That way you can hit the ground running when the contract is signed.

### Establish an LMS Project Team

Many organizations underestimate the resources required to successfully pull off the implementation plan they have developed. They also tend to underestimate the type of resources required, focusing primarily on the required technical resources.

Each implementation is different and there is not one standard project team configuration that is appropriate for every organization. Keeping that in mind, here are some general recommendations for who should be on the project team.

- **Project Manager**

Accountable for leading the daily activities of the LMS project, working in collaboration with the vendor's project manager, and overseeing the work of all project team members. Overall accountability for managing LMS vendor.

- **LMS Business Process Specialist**

Provides direction to the LMS initiative related to linking formal/informal training and other business processes to LMS functionality. Facilitates decision-making across the organization to determine consistent philosophy and approach. Re-engineers processes where needed and translates "paper-based" processes into LMS functionality.

- **Change Management Specialist**

Assesses and identifies cultural implications of LMS initiative. Recommends and develops interventions to ensure successful implementation with all levels of employees and stakeholders. Works with businesses to develop policies and processes that support the new learning process and address cultural barriers.

- **Communications and Marketing Specialist**

Provides targeted marketing and communications strategies to support the promotion of the LMS to employees and stakeholders. Develops communication strategies to keep stakeholders and the organization up to date on the status of the LMS initiative.

- **Technical Specialist**

Responsible for managing the technical aspects of the project as well as the determination of business requirements. Serves as the liaison between the Information Technology Department and LMS vendor for all technical aspects of design, development and implementation of the Learning Management System.

## **Begin to Map out Business Processes**

This is a good time to start your organization thinking about how they currently conduct their learning activities. It's also a good time to start mapping the process that learning activities typically follow in each business. Once the mapping is done, you can compare learning activities across businesses to uncover similarities and differences and find common ground to create a consistent learning approach across your organization.

## **Begin Change Management Activities with Pilot Groups**

Provided that your pilot group(s) have been identified, this is a good time to begin preparing those parts of your organization for change. Consider working with those business units or departments to:

- Assess the current learning culture.
- Determine the gap between the current culture and the culture you want to create, using the LMS as a tool to get you there.
- Develop the environment, processes, and policies needed to support the new learning culture.

## **Start to Develop the Marketing Strategy**

Now that you have selected an LMS, you need to educate your organization on what is to come and how it will affect and benefit them. Marketing and Communication goals should include:

- Setting and managing expectations for managers and employees regarding capabilities of the LMS.
- Preparing employees for the changes that are occurring in the culture.

You should define your audiences (senior management, middle management, employees), tailor messages, and determine preferred communication vehicles. If everyone affected by the LMS implementation is not on board, your returns will not reach your expectations, even if you have followed faithfully the ten steps to successfully selecting a Learning Management System.

# LGUIDE

The E-Learning Experts™

## Lguide Consulting

### E-Learning Strategy Development and Vendor Assessment and Selection

Lguide Consulting provides:

- Detailed needs analyses that help clients determine their strategic training needs, and identify complementary e-learning products, content and technologies of appropriate scope, platform, medium and cost.
- E-learning strategy development that helps organizations plan and develop initiatives that maximize ROI.
- Customized vendor evaluations that save clients time and money by narrowing the universe of potential e-learning options to those most appropriate for the organization's specific needs.
- Development and administration of Request for Information and Request for Proposal processes, evaluation of vendor responses and vendor-independent consultation to help clients choose the most appropriate solutions.

**The Lguide Advantage:** The strategy development and vendor selection services of Lguide are grounded in independence and neutrality. In contrast to many other consultancies, Lguide does not accept referral fees for product recommendations. Lguide's analysis is both authoritative and unbiased—our only goal is to help clients get the right solutions at the lowest cost and with the greatest potential return on investment.

On the following pages you will find profiles of three recent Lguide consulting engagements.

- State of Washington
- Quorum Health Resources
- City of Seattle

## State of Washington



Washington State has become one of the nation's leading technology centers, home to the world-class computer science department at the University of Washington and corporate innovators such as Boeing, Microsoft, RealNetworks and Amazon.com. Washington State government has also been recognized as a leader in using information technology and the Internet to improve services to businesses and citizens. For three consecutive years, Washington State has been named the nation's Digital State in a competition sponsored by the Progress and Freedom Foundation, the Center for Digital Government and Government Technology Magazine, marking its unsurpassed use of technology in government and education. State training leaders decided to build on the foundation of Internet-centered services for the public by providing State employees Web-based learning opportunities, bringing efficiencies to training for personnel.

**"Quality has been defined as 'going above and beyond expectations'. That is exactly what Lguide did. The State of Washington was at a crossroads when Lguide came into the picture. They helped re-focus the project and move it forward. They provided a very timely and much needed objective service—one that led to the best choice for an e-learning partner for all state employees. A company would be foolish to try and tackle an e-learning initiative without enlisting the services of Lguide. Lguide brings objectivity that is too valuable to try to make major e-learning decisions without."**

**—David Dobson, eLearning Program Manager  
Washington State Department of Personnel**

### The Challenge

The Washington State Department of Personnel was tasked with building an e-learning strategy, efficiently choosing the most appropriate vendor partners and successfully managing the integration and introduction of this new service for State employees. The Department was operating on a tight budget, had strict technical interoperability requirements, and was moving on from an unsatisfactory experience in its first effort to identify the right platform for delivering and managing e-learning courses. In this context, Washington State turned to Lguide for its independent counsel in selecting the right set of products and vendors to best meet the State's needs.

### The Solution

Lguide first worked with the State's Department of Personnel to analyze previous efforts to select an e-Learning platform and draw conclusions from those experiences. Lguide consultants helped the State refine its functional, technical and business requirements, and translate those requirements into a thorough, detailed Request for Proposal (RFP) document. Lguide consultants then reviewed the proposals with State training leaders and participated in finalist interviews, providing an informed, independent point of view throughout the vendor selection process.

### The Results

Washington State is now putting its solution into action—leading the way in e-learning for state employees as it has in providing e-government services for its citizens. As the manager who Lguide worked side-by-side with during this process commented, Lguide provided "a very timely and much needed objective service—one that led to the best choice for an e-learning partner for all state employees."

**Quorum Health Resources, LLC**



Quorum Health Resources, LLC, is the nation's largest provider of contract management services to not-for-profit, acute care hospitals in the United States. Quorum provides management advisory services, implementation support, education and training programs to more than 200 independent hospitals and health systems in over 43 states.

The Learning Institute at Quorum designs and delivers customer driven education courses and products that strengthen their clients' capabilities to lead and manage in an increasingly competitive marketplace. Guided by a faculty comprised of Quorum healthcare consultants and operations experts, The Learning Institute's educational programs are all grounded in sound learning methodologies and aimed at practical outcomes for their audiences. The Learning Institute's programs are offered nationally, regionally, on-site at hospitals, and most recently as instructor led, web based seminars.

Building upon this base of first-rate in-person training for its clients, Quorum executives saw the value and efficiency of expanding their offerings to include e-learning—both to provide training for Quorum's own employees and to create rich learning opportunities for the wide network of hospitals they serve.

**"Lguide was everything a consulting company should be. They were efficient, fast, courteous, good humored, informative and affordable. Lguide consultants listened as much as they talked. They learned about my business. They enhanced my decision-making and confidence. Buying an LMS is a major commitment. The fraction of the purchase price I invested for Lguide's advice will pay off handsomely, I'm sure. I was completely satisfied."**

**Tom Noser, Director of Distance Education  
The Learning Institute at Quorum**

**The Challenge**

Quorum sought a learning solution that would meet the needs both of its client hospitals and their personnel, but also the needs of its own employees. They wanted a learning platform that would be scalable and hosted, with strong reporting, administrative, and authoring features. The solution needed to have both effective internal classroom management features and be web optimized to serve Quorum's dispersed network of hospitals. Quorum's time was limited before it wanted to roll out a solution, but it absolutely needed to make the right choice. Quorum turned to Lguide.

**The Solution**

Quorum had already conducted an internal needs analysis by the time it engaged Lguide. Lguide's consultants helped hone this analysis by evaluating it, refining the approach, and suggesting the inclusion of additional data to ensure its comprehensiveness. Quorum managers initially were unsure whether there would be time to conduct a thorough Request for Proposal process before its internal deadlines would pass, but Lguide consultants quickly helped them convert the needs analysis into an effective RFP.

Based on Quorum's needs, Lguide researched the Learning Management System marketplace and delivered a short list of the most appropriate systems to be included in the RFP process.

**The Results**

What often takes several weeks or months—honing a Learning Management System needs analysis and preparing a thorough, targeted RFP—Lguide consultants helped Quorum accomplish in a matter of days. As a result, Quorum will be able to begin meeting the e-learning needs of its clients on time and with an affordable, effective solution.

**City of Seattle**



The City of Seattle is Washington state's largest municipality, with nearly 600,000 residents and over 10,000 city government employees. Seattle City government is committed to providing first-rate services to its citizens while maintaining an affordable tax burden. The City has been recognized as being in the forefront nationally in using the Internet to improve services to local businesses and citizens. City leaders decided that investing in their staff's skills through Internet-based learning would be a natural and efficient extension of that effort. E-learning could provide employees with greater access to training and skill development opportunities without costing the taxpayers more.

**"Lguide went above and beyond my expectations for this project. Everything was done on time, on budget and in the City's best interest. We were able to keep this process moving and get to a decision point because of your expertise and assistance. Thank you."**

**-Owen Scott  
Citywide IT Training Manager  
City of Seattle**

**The Challenge**

The City of Seattle wanted to make the best possible decision in selecting an e-learning platform and content partners. They sought an independent advisor that could provide unbiased and authoritative counsel in shaping the selection process and helping to choose the best alternative. Seattle turned to Lguide.

**The Solution**

Lguide first worked with the City's group of training professionals to hone its needs analysis and business case for implementing e-learning. Then, Lguide consultants helped Seattle develop the criteria for evaluating vendors that were responding to the City's Invitation to Bid. Lguide evaluated the proposals, interviewed the respondents along side City staff, and recommended the finalists. Using its expertise in e-learning analysis and evaluation, Lguide facilitated the entire evaluation process and final selection.

**The Results**

Today, the City of Seattle is implementing its e-learning solution—one selected with the assistance of Lguide consultants. Lguide's services—delivered on time and within budget—helped the City better understand its needs and e-learning business case and then select the right system to meet those needs. Employees will now receive expanded access to high quality learning experiences and the City's businesses and citizens can expect a better-trained government workforce to serve them. Lguide's independent advice helped Seattle keep the project on track.

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