How to ensure you get the best technology, at the best price, with the best performance and support
Contents

The Truth and Consequences of Picking an LMS Vendor: Who Has Your Best Interests at Heart? 05

The Search for the Intelligent, Integrated LMS 09

Options! Options! Options! Is Anything Included? 14

The Swiss Army Knife Syndrome: Is Your LMS at Risk in a Supersized HCM? 19

The Omnipresent LMS: Connecting Your LMS to the Enterprise Ecosystem with REST APIs 23
FACT: There are more than 550 companies claiming to provide learning management systems! Needless to say, you have a lot of options when it comes to buying your new LMS.

So where do you start? How do you ensure that you end up with...

> **The best technology** for your current and future learning needs

> **The best implementation, service and performance** to support it

> **The best price** and return on investment
Start Your Search Here

We’ve assembled your Ultimate LMS Selection Guide based on our:

1. Industry-leading 12+ years of LMS service
2. #1 ranked LMS technology – ExpertusONE™
3. Best-in-breed customer support teams and programs

From picking a vendor, to options and implementation… we compiled the most helpful tips – and gotchas – to assure you find the best LMS for your organization.

Your Ultimate LMS RFP Template

As you probably know, there are dozens of LMS RFP templates available online. What you may not know is that most of these are created by LMS vendors and designed to direct you to their LMS.

So how do you find a vendor-neutral LMS RFP template that leads you to the best next-gen technology for your company?

Check out Craig Weiss’ (author of the E-Learning 24/7 blog) newly released template. It will save you time and deliver top results...

LMS RFP Template

How to Use the Template

Benefits of Using this Template
The Truth and Consequences of Picking an LMS Vendor: Who Has Your Best Interests at Heart?

The LMS’ role in global corporations continues to expand and become a more critical part of achieving your learning organization’s primary goals: improving employee and customer/partner education, driving enterprise-wide efficiencies and growing sales.
Unfortunately, as more and more LMS vendors enter the playing field, and pressure escalates to reduce the price of learning systems, choosing the right provider – one that truly has your best interests at heart – has become a much more complicated and risky process.

Three key questions you must consider…

1. Can you really trust your provider to **seamlessly implement** their LMS solution?

2. Will they also assure that it **fully aligns** with your learning org’s business objectives, timeline and budget?

3. Can you rest easy knowing that they’ll continue to **reliably support and update** their solution with new and trending technology advancements?

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**The RFP Template Trap**

As you know, there are countless ready-made LMS RFP templates (or question lists) posted online by companies, analysts and vendors themselves. True, they’re a quick and easy starting point. However, using a standardized RFP template can actually steer your focus towards the wrong LMS criteria, and not the unique, core serviceability your organization really needs for near- and long-term success.

**Truth #1: More Features Is Not Better**

It’s wise to be wary of LMS RFP templates with 100s of feature/function rows. More is not better here – it’s actually a big time negative – and here’s why…

Ensuring a LMS’ features and functionality should be the easy part of your search. The industry is mature. And many of the players are experienced. So any major LMS platform should do the basics: online content management, classroom scheduling, robust search, certification administration, etc.

*The reality is that almost every vendor is going to say, “Yes” to every one of your requirements anyway!*
Scenario & Consequence #1:

- The vendor interprets your requirement in a way that their product could support the need.
- Their long and numerous requirement documents simply become “fill in the blank” exercises.
- Your evaluation group wastes countless days/weeks/months reviewing endless RFP responses with a less than helpful or telling result.

Scenario & Consequence #2:

- The vendor’s LMS was actually designed to say that it can do everything you want it to do.
- You end up with a bloated LMS that performs poorly, requires a ton of training and drives your learners crazy.

Feature Bloat vs. Focused Performance

Fact: The more features and module choices you have, the more time-consuming and complicated – aka “bloated” – your LMS and its implementation becomes. So it’s imperative that you select an LMS platform/provider that optimally meets your organization’s core needs. If learner adoption is your primary business-critical concern... then focus your search on a solution that's built on usability and intuitiveness – not an endless features list.

*Just because you have 100s of learning features, if your learners can’t find or understand how to use them, they are, in reality, worthless!*

Truth #2: Risks Should Be Acknowledged

Are the LMS vendors you’re considering realistic in the discussions leading up to your SOW? Managing issues and risks effectively is a tipping point for any large LMS implementation’s success. So make sure to scrutinize the processes (if any) they have in place – i.e. Do they have documented risk management policies? What about standardized timelines? Or do they simply state they’ll meet yours (a definite red flag)?
Picking Your LMS Provider: What Actually Matters

To help you determine what provider will best deliver on your core learning needs, reference the following LMS Vendor Selection Checklist:

> **Objectives-driven Demo** – What’s in their demo? Is it just a surface-level features presentation? Or can they actually demonstrate more meaningful LMS business processes and objectives?

> **Change Management Policies** – Let’s face it, your business is going to change. But does the vendor understand this, and will their LMS easily accommodate these changes?

> **Implementation Expertise** – The success of any LMS goes far beyond its design and technology. Now’s the time to review how they’ll handle your existing content and data migration. Experience matters!

> **Integration History** – Sure, they know how to integrate their own LMS. But are they skilled in integrating other platforms, including your current system? And do they have a healthy REST API library for seamless integrations?

> **Customer Referral Access** – Ask real customers how the vendor managed their project. How was change control handled (was it a foreseeable scope change; should it have been accounted for prior to the SOW)? Was there consistent account and project management?

> **Product Roadmap Input** – Find out if your company will have input on their LMS’ evolution. Can you influence new features? Or is the provider simply too big to accept customer influence?

**Truth #3: Success Can Be Measured**

The ultimate success of your LMS decision can be easily measured based on learner and admin adoption rates, compliance increases and manager accountability in career development. So make sure that your solution has a simple, intuitive process for tracking this all-important data.

You should also make sure that you invest the time to really get to know the LMS provider you’ll trust with your learning interests. If you dig a little deeper and demand a bit more... you’ll, no doubt, get the big payoff you’ve been hoping for!
The Search for the Intelligent, Integrated LMS

The pressure to implement an enterprise learning ecosystem that’s intuitive, yet engaging, prescriptive, yet user-driven, is on! Did you know...
More than 56% of organizations expect employees to connect with learning resources on a daily or weekly basis to effectively perform their jobs.
– 2012 Brandon Hall Study

So how do you better entice and engage your learners?

Begin your search for the ‘Intelligent LMS’ now. Below is a three-part LMS IQ Test that will help you find a gifted next-gen system that:

- Rapidly responds to the evolving expectations of learners and stakeholders alike.
- Has an integrated, stable framework that’s optimized for your current and future learning technology.

A ‘Suite’ Deal?

Instead of moving towards an intelligent, integrated LMS, many legacy learning system vendors have transitioned to a Talent or HCM Suite play sale – allowing (or requiring) buyers to select from multiple modules beyond traditional learning.

This, ultimately, moves buyers into the talent and HCM space (which certainly may boost learner engagement)... but this also creates new integration challenges for their LMS and the team that has to operate it.

Read on to learn more...
LMS IQ Test #1: Seek ‘The Total Package’

There’s a huge advantage to partnering with a vendor that offers a complete, fully integrated learning ecosystem – aka ‘The Total Package’. Learning modules, mobile and offline content apps, talent modules, social components, eCommerce and more are all seamlessly linked and accessed via your LMS. Pretty smart, right?

To ensure your LMS offers this higher level of built-in reach and functionality, ask these seven key questions during your vendor evaluations:

1. Do any modules overlap or conflict with your existing corporate system?  
   *If so, it may cause big time delays and cost overages.*

2. What efficiencies will you gain with an integrated learning system, both technical and operational (i.e. the human impact)?  
   *Make sure you can articulate this when delivering your business case.*

3. How many modules are required to meet your short-term (Phase 1) goals? And does your organization require at least half of them?  
   *If not, you may be ‘over buying’ and creating a complicated implementation with an operational nightmare.*

4. If your short-term goals don’t require all of the modules, do you have to pay for them now? Or can you add them later?  
   *Flexibility is key! If you can add and expand modules as your organization grows, you’ll have a more cost-effective solution now and a more successful long-term solution as learning needs mature.*

5. What’s the maintenance and IT impact (if any) of using more modules beyond learning?  
   *You must know how tightly coupled the modules are to really understand the actual scope of your integration maintenance and future testing cycles.*

6. Are all of the modules updated and released on the same upgrade schedule?  
   *If not, you may be looking at multiple downtimes each year... or downtimes caused by modules your company’s not even using!*

7. What’s the operational support model for the entire learning ecosystem?  
   *Is one support alias/number provided? Or are multiple contacts given for different modules? Ensure your learning system’s ongoing success by avoiding LMS vendors with multiple points of contacts for product module escalation. No doubt delays will occur, and your learning community’s progress will be affected!*
LMS IQ Test #2: Find an Agile Approach

When considering your LMS selection, it’s critical to understand each vendor’s development approach:

• What do they spend on R&D?
• Do they own all components of the development process?
• Are any application modules purchased or developed by other vendors?

The answers to these questions are important for several reasons, including: the quality of the overall LMS, the consistency in user experience and the ability to report and receive fixes when issues are identified.

*Development modules continue to evolve. So validate if the vendor has already moved to a development process like Agile. Why? Because this will ensure a faster response and turnaround time to any issues – as well as newly released features.*

Note: If they’re not using models like Agile, that’s still okay… as long as the vendor can demonstrate how quickly they respond to customer requests and efficiently resolve issues.

Why Intelligence Matters: An LMS Integration Case Summary

Recently, a global manufacturing company ran into a major problem...

After implementing a new LMS, their team reported strikingly different results when searching for the same content as a learner and admin – which rendered both their search and registration tools unreliable.

After weeks of tedious investigation, they discovered that their LMS’ search modules were actually coded by different development teams, in remote locations, and then tested by separate testing units!

The lesson?

Had they gone with a fully integrated LMS and service provider, they could have significantly shortened their implementation cycle, eliminated add-on costs and avoided unnecessary headaches.
LMS IQ Test #3: Get the Inside Scoop

After identifying a vendor’s development approach, why not get the inside scoop on its actual effectiveness? This is a great area to discuss with current customers during reference calls.

*Make sure to ask questions about the responsiveness and release cycle communication for each vendor you’re considering. Vendors who are consistent with release timing and avoid frequent ‘hot fixes or patches’ will serve you better in the end – because it will be less distributive and more stable when they do a release, then if they continually do emergency fixes to your production environment.*

Another telling question to ask a potential vendor’s customers is…

> How responsive are they to feature and bug requests?

You want to partner with someone who’s built an LMS for the long haul; one that can easily adapt your future learning needs, while maintain a system that’s up, running and reliable.

A Final Word to the Wise

The LMS landscape is littered with vendors today. That’s why you should seriously consider the evolution of the partner you’re selecting. Choosing a vendor who’s new to the market may, in fact, provide a more stable, holistic learning platform for your company.

Or, if you’re looking for numerous modules (including talent), then it may be advantageous to select a vendor who’s merged or acquired best-of-breed products and created a single offering. After all, isn’t the goal of the LMS to serve up a seamless, intuitive and intelligent platform to all end users – whether internal, customers or partners?

To create this all-inclusive, engaging experience, the learning platform’s underlying architecture and framework must be ingeniously designed and carefully managed from a development standpoint.

*Welcome to The Intelligent, Integrated LMS!*
Options! Options! Options! Is Anything Included?

Consolidation and acquisitions have positioned many former LMS providers with all kinds of options and add-ons for their systems. Now’s the time to read the fine print...
Each year during the Holiday season, we see countless advertisements for luxury cars. Happy families navigate snowstorms as each child watches their own movie, parents make dinner reservations using the car’s built in navigation systems and sit comfortable on heated leather seats.

All of these features come at such an affordable monthly payment – or do they? At the end of the commercial, in very fine print, we learn that the advertised price reflects the MSRP on the car before the winter driving package, sport package, entertainment package and upgraded leather seats.

The LMS market has gone down a similar path in recent years. Consolidation and acquisitions have positioned many former LMS providers with all kinds of options. What used to be standard features are now a multitude of options for content hosting, video streaming, talent modules, authoring, mobile and social collaboration.

Time to read the fine print…

1. Does the price include the core learning features you require?
2. What modules are actually included in the initial pricing?
3. Does the price reflect all features that the vendor said they had in the requirements tracker?
4. How many options or add-on elements are referenced at the end of the response?
The maturity of the LMS market should be forcing vendors to ensure that the basic (advertised) product includes the foundational elements your company will need for success. But times have changed. With so many LMSs out there, downward pressure on price is making things more complicated.

Myth #1: Advanced Reporting Is Optional

Imagine with me that you already got your LMS up and running, and learners and managers are using it to consume and complete content.

At this point, it is critical for you to have the ability to access information both inside your LMS and to extract data outside of the system and into other HR systems.

So, when you’re in an LMS demo and looking at their reporting and analytics tools, ask if they are all included in the standard pricing.

Paying to access advanced modules or the ‘analytical’ view is simply not acceptable. To be effective and measure success within your organization, reporting should be as flexible and accessible as possible – to as many users as you deem necessary.

Also, ensure that the ability to extract data real-time (via APIs or web-services) is included. This will enable your IT team to have control over pulling data out of the LMS and into other key HR systems where more informed analysis will be conducted.

Ask clear and direct questions about how the vendor updates their APIs, controls access and provides methods for your team to use them directly.

> If the vendor includes hourly pricing for their professional services team to enable APIs or web-services, think twice. This is a red flag!

Yes, you might choose to use the vendor, but ensure that they are not the only LMS you’re looking at.

Does the LMS architecture support the open exchange of information both into the LMS and extracts from the LMS via REST APIs?
Data, Data and Lots More Data

Look carefully at how the vendor structures pricing around content hosting. This should include online content, videos and even mobile downloads.

Many LMS vendors include storage up to a certain size. This makes sense because the vendor has to do this for planning and storage forecasting. Just make sure that the price makes sense for your organizational size and delivery preference. If you are a heavy user of video or online content, the ‘standard’ content hosting that is included should reflect the same enterprise pricing discounts that they offer per user.

How do they manage access to not only content, but for any mobile applications? Will you incur additional charges for offline or mobile consumption?

Look carefully at OJT modules or user-generated content. How is it stored and what impact (or control) will you have on the annual spend for the storage of this material? One of your main goals is to drive up usage and consumption of content. As organizations move to informal content and alternative delivery methods, LMS vendors should have pricing and storage that encourages these goals. As an informed buyer, you need to make sure that you understand all of this before an agreement is reached.

Myth #2: Unpredictable Content Storage Costs Are the ‘Norm’

A solid RFP selection process will help to prevent those horror stories of international roaming charges and data usage that used to be all too common with wireless carriers.

Ensure that the LMS vendor you are working with provides truly ‘unlimited data access’ or at least predictable spend that is proportional to your organizational size and content breakdown.
The All-inclusive Option

Let's talk about additional models like performance, talent and even mobile...

Lots of good LMS providers offer these optional modules as part of the LMS, and sometimes even demo them as included components. In reality, these add-ons are often extra. Extra, non-core elements of the LMS that require a company to implement (read additional $$) and licenses (read increased annual fees) separately.

Another scenario is that the modules may be required for purchase. For example, you have to buy an optional assessment module even if your company has no intention of using it.

Myth #3: Adding Modules Will Result in Higher Implementation Costs

Make sure you are working with a vendor who provides a comprehensive solution where the modules that you require are included in the known, or at least a predictable, cost module. Vendors should be enabling your company’s success with the LMS by positioning you to expand usage and drive up consumption of training.

Ensure success by understanding the upfront fees for all components of the LMS; even ones your company isn’t planning to use on day one.

These are not the only myths that you need to watch out for, but the most important thing you can do is be diligent about questioning what’s included in the standard price. Don’t feel bad about sounding like a broken record, asking them over and over whether it’s included.

If you’re at all unsure, then ask! This will probably save you and the LMS vendor a lot of pain and strain down the road and help make your new LMS a success.
The Swiss Army Knife Syndrome: Is Your LMS at Risk in a Supersized HCM?

Have you ever heard the expression, “Jack of all trades, master of none”? It’s what I like to call ‘The Swiss Army Knife Syndrome’ – and it can put your LMS, and your entire learning organization, in serious jeopardy!
The Swiss Army Knife Syndrome is when a myriad of tools are bundled as one... most of which you’ll never use because the original standalone device simply does a better job:

- If something needs to be fastened, you use an electric screwdriver – much faster!
- If something needs to be cut, you use a sharp, full-size pair of scissors – much easier!
- If something needs to be sawed... well, you get the picture.

So how does this apply to learning?

Unfortunately, The Swiss Army Knife Syndrome has spread to the talent management and learning technology space with the arrival of the supersized Human Capital Management (HCM) platform.

True...

The allure of switching from a dedicated LMS platform to an all-in-one HCM ‘solution’ is quite tempting at first glance because you broaden your functionality spectrum.

But...

The HCM doesn’t perform exceptionally well in any capacity. So it’s really not as handy as you’d think, and can actually put your LMS – and your entire learning organization – in serious jeopardy.

What you need to do is closely examine your learning requirements. Then consider the value that a highly adaptive, dynamic LMS can add to your HCM infrastructure. Will a kitchen-sink HCM system demand too much compromise? Here are three key syndrome symptoms to deliberate.

expertus.
Symptom #2: Learning Shouldn’t Be Standardized

While learning and development does align well with career progression and talent management, standardizing these components into one HCM suite is not a good idea. Here’s why...

It’s naive, at best, to assume that your exact learning needs can be fully addressed by basic LMS technology added to a HCM ‘mother’ suite. When it comes to learning, one size does not fit all! Would a surgeon select a Swiss Army blade over a scalpel?

Your learning organization’s success depends on matching the proper, fully functional, optimized tool (a standalone next-gen LMS) to the context at hand.

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Symptom #1: Learning’s Not Easy

On the surface, organizational learning may seem like a relatively simple and intuitive process, particularly in a networked environment. However, supporting enterprise learning and performance is complex and often brings unexpected challenges from other operational areas, such as HR or IT...

1. It’s these areas that like to buy integrated suites.
2. But since they’re not deeply familiar with your learning needs, they’re likely to overlook critical criteria.
3. Which typically results in a costly mistake – reworking or replacing the entire system!
Symptom #3: Learning Can’t Be Contained

Many enterprise organizations are grappling with how to uniquely and effectively serve external learning communities – customers, channel partners, etc. In particular... how to seamlessly integrate their learning experiences with the company’s internal information systems and business processes.

You should know that:

• This poses a huge challenge for supersized HCM systems because they’re built to focus on and operate from internal resources only.

• So, extended enterprise learning can’t be properly served by an HCM suite.

Your Two-step Diagnosis

I’ve only covered a few of the many reasons why you should proceed with caution when considering an integrated HCM. But the three symptoms presented here are the most dire and will, hopefully, direct you to:

1. Discuss and identify your full learning requirements.

2. Examine the level of service they’ll receive (if any) from a Swiss Army suite.

If you find your LMS to be indispensable, then you should stick with a platform that’s perfectly optimized for your organization’s unique learning needs – versus settling for a generic tool in a catchall suite that won’t quite fit the bill.
The Omnipresent LMS: Connecting Your LMS to the Enterprise Ecosystem with REST APIs

Playing within the newly opened landscape of enterprise applications is no longer a nice add-on feature, but a real must have for your LMS product...
Programmable Web recently announced that their published directory of Application Program Interfaces (APIs) surpassed 8,000. Just as impressive is that...

- In 2012 alone, they added the same number of APIs as the past six years combined!
- They increased their API directory from 7,000 to 8,000 in just three short months.

So why does this matter to you as an enterprise LMS buyer? Because the “Enterprise Category” has, by far, the most available number of APIs, which you can now leverage with ease.

Basically, the time to take your LMS and its data to the cloud has arrived. And playing within this newly opened landscape of enterprise applications is no longer a nice add-on feature… but a real must have for your LMS product.

The API Defined

Application Programming Interface – aka “API” – refers to the method in which enterprise software or systems communicate with one another to exchange information via the cloud.

Gartner predicts that by 2014, 75% of Fortune 500 enterprises will use APIs.
Know Your Enterprise Information Protocols

When considering moving to your LMS to the cloud and integrating with other enterprise applications and/or systems via APIs, there are several key questions you should ask about your current or future learning management system for optimal ease and success.

Key Question #1: Does your LMS support the same protocols and movement towards an open, cloud-based architecture as the rest of today’s enterprise?

1. Better protocols and smarter applications have resulted in a tremendous flow of information both into and out of corporate systems.

2. CRM, finance, marketing and sales applications already have proven, available API schemas.

3. IT departments are now savvy API consumers, and increasingly demand that all corporate systems communicate and exchange information in an open, flexible and secure manner.

Secure an Open Information Exchange

The role of the LMS has recently evolved from a repository for storing and tracking compliance training to an intelligent, “go to” site for employees, customers and partners alike.

Key Question #2: Does your LMS support an open, two-way information exchange – i.e. data in and out of your system?

Data In...

- Social learning modules and a more tailored learning experience demands tighter integration with other HR modules.
- Managing talent and internal resource pools is much more effective by sending information into the LMS about new job roles or skills required for your learners.
- Driving training revenue is better facilitated when you can link consumer profiles from CRM and ERP systems to your training catalog.
Data Out...

- Delivering a truly personalized learning experience can only happen when your LMS facilitates real-time (or at least near-time) communication to external systems and data hosted inside other enterprise applications.

- Driving users to your site is simpler when you can pull data from your LMS (like “Newly Released” or “Most Popular Connect”) and embed it into HR landing pages or customer portals.

The symbiotic, push/pull information exchange needed to support these scenarios is only achieved in an LMS that’s architected to be open and flexible, yet still highly secure. And you’re only guaranteed this design by choosing an LMS that works with REST (Representational State Transfer) APIs.

Require REST API & Implementation Support

Key Question #3: Does your LMS vendor work with REST APIs, and will they support your entire implementation and operational project?

REST APIs

During your evaluation process, it’s critical to understand your vendor’s technical approach to information exchange.

Engage your IT team in conversations with the vendor's technical consultants to determine how you can best partner in moving data into and out of your LMS. And by all means, make sure to find out if your vendor uses traditional web services or REST API-enabled protocols. Here’s why...

REST APIs vs. Web Services

In a nutshell, REST APIs are very flexible in nature – returning output in either a JSON or XML format. Conversely, traditional web service calls are very rigid – limiting all output to just an XML format.

What this means to you is that the REST approach ensures faster, easier implementation with your other enterprise systems. It also provides enhanced flexibility in the types of data elements and formats your LMS can use, receive and send.
REST API Library Management

You should also evaluate vendors not only on their current library of REST APIs, but on how they actually manage it.

Reviewing how often their library’s updated and when the last set of APIs was released will tell you a lot about their platform’s underlying architecture.

> A truly open platform will have continued expansion of available APIs.

You should also be able to access some type of development area where a vendor’s REST APIs can be viewed, tested and changed to meet your project’s specific data schema exchanges.

> Demand more than just a pdf for your IT team to review!

Overall Integration Approach

Finally, when evaluating a cloud LMS…

> Take care to document the other critical systems you’ll need to communicate with from a data sourcing standpoint.

Discuss the approach with your IT team and vendor to determine what your integration will look like and how easy or complicated it will be.

The Bottom Line

Chances are, your legacy LMS is not built like other leading enterprise technologies… yet the demand for it to communicate with them via the cloud is a real, growing need. So to integrate effectively, your system must:

1. Change quickly,
2. Provide easy-to-use integration methods, and
3. Utilize leading security and communication protocols.

Now’s the time to empower your learning community with a REST API-enabled ecosystem that delivers accurate, dynamic data from other applications within your corporate infrastructure.

The result? More targeted learning experiences, more predicative reporting metrics and more impact on your company’s bottom line.
If you'd like a free, personalized consultation on optimizing your LMS selection process, please contact Kathleen directly at kathleenw@expertus.com.

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Well versed in LMS and eLearning technology, Kathleen solves key learning challenges for Expertus’ numerous global Fortune 100 companies by overseeing client relationships, technology implementation and business analysis.