BUYER’S GUIDE:
Learning Management System for Small and Mid-Size Organizations

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Small and mid-size companies have employee training needs that are every bit as complex and mission critical as large organizations. This makes the delivery of high quality, value-based and technology driven learning solutions to this market segment important to their success. The question these organizations should ask is how can they acquire a Fortune 500 employee training solution on a small company budget? Smaller organizations can acquire outstanding solutions with creativity, planning and a diligent search for the right partner. This buyer’s guide will offer a roadmap to make finding the right partner a little bit easier.

So, you need a Learning Management System. Or – you’d like to replace your current Learning Management System (LMS). How do you go about actually buying one?

The fact of the matter is that while learning technology is no longer “new”, there are still thousands of smaller organizations that for a variety of reasons do not currently use a learning management system. Additionally, there are many organizations that make the decision to buy only to become dissatisfied with the system they selected. The purpose of this guide is to help demystify the buying process, clarify some of the confusing terms and acronyms commonly used, and offer some common sense suggestions for making this important investment decision.

The most basic and fundamental question to ask yourself is: what is the business need we are trying to meet by acquiring an LMS? If you cannot answer this foundational question, you could end up going down the wrong path towards a solution that will never satisfy your organization. In fact, there is a lot of data derived from extensive market research over the last several years proving that most organizations are dissatisfied with their current LMS solution and/or vendor. Don’t let your organization become one of these statistics.

More than 80% of our new clients are new to online training when they implement our solutions, so we’ve learned quite a bit about what business needs led them to consider and then buy an online employee training program that includes an LMS. What follows are summaries of some of the most common business drivers that led to the decision to purchase an online training solution and learning management system.

ASTD published an annual State of the Industry report. This report contains some great information about employee training and development trends.

$1,182
The average direct expenditure per employee per year
This is a 4% drop from 2010 ($1,228)

employees averaged 30.5 hours/year
About 1 hour less than 2010
Employee training in many organizations is delivered through instructor or facilitator in a classroom setting. And this remains true no matter the size of the organization. According to the American Society of Training and Development’s (ASTD) annual State of the Industry Reports from both 2011 and 2012, instructor-led training (“ILT”) remains the backbone of most employee training programs. However, instructor-led training (“ILT”) only programs are more common in smaller organizations, and in today’s business environment, ILT-only programs create significant employee training challenges. An automated solution can address many of these common training challenges.

A small company with fewer than 500 employees has an average cost per learning hour used of $126, compared to $82 for a midsize organization, and $51 for a large organization with more than 10,000 employees.*

Having employees working in multiple locations was once an issue faced only by larger organizations, but that is not the case anymore. Technology advances in communications and online connectivity afford organizations of every size the opportunity to work with employees located in various places. There is less and less reliance upon everyone being located in the same physical space.

These same opportunities create challenges for employee training and development efforts. It’s difficult (maybe impossible) and sometimes very expensive for smaller organizations to get every employee in the same place at the same time for a traditional classroom training session.

Online training and training technology offer solutions for organizations with scattered workforces by allowing employees to access on-demand training content, as needed, at their convenience without the need for every employee to be in the same physical space for classroom training sessions.

As smaller organizations face more and more complex training challenges, training professionals need access to more reporting and tracking. One significant market challenge impacting the need for tracking and reporting is the changing regulatory compliance environment. Depending upon the industry, some organizations face training compliance requirements from a variety of local, state and federal agencies. On top of governmental compliance requirements, some employees may have professional licenses that require ongoing education and certification tracking, too. In order to prove compliance with these requirements, the ability to track and then report on training activities is critical. Learning management systems automate the tracking, record-keeping and even the delivery of content to support these important business needs.

Many smaller organizations have HR teams of limited size with competing demands and priorities, including payroll, employee relations, benefits administration, HR administration, and . . . Well – you name it! And then there comes employee training and development. When there are only a few, or sometimes even one, HR Professionals trying to deliver HR support to an organization, employee training is sometimes (usually) not a major priority or area of focus.

One of the major stumbling blocks to the delivery of employee training in traditional classroom settings is the time involved in developing and delivering the content. Online delivery changes the dynamic so there is far less time involved for the HR team, but far more training content and value delivered to employees.

For instance, the HR team may no longer have to carve out four to five hours developing course materials, and another two hours delivering a course on communications skills. Instead, one HR professional can assign a communications course (or courses) to employees who need the training, set up e-mail reminders to take the course, and then check in after 30 days to see who has completed the training. These tasks might take less than an hour. As for the employees – none of them had to leave productive work to come sit in a classroom, and you can ensure everyone took the training – even if they might be out of the office on the day your HR professional assigned the materials.

Automating the delivery of training content using an LMS represents a great solution allowing organizations to make greater use of scarce resources and deliver comprehensive employee development programs all at the same time.
Business Need

Cost and benefits

We frequently get caught up thinking about what things costs our organizations, and costs is a legitimate concern when it comes to investments. But when you are looking at investing in learning technology, we think you can make a much better business case for moving forward by focusing instead on the business benefits the proposed solution can deliver.

Senior leadership will want to know how the investment in an LMS will improve business results. You cannot explain improved business benefits if you are caught up in an ROI calculator trying to prove that you will save $75 for every hour of training your employees absorb online as opposed to what they take in the classroom. So, look to how it will benefit your organization, and focus on the gains you make from the investment. Here are few places you might look:

- **Productivity:** HR and training professionals will gain productivity through a reduction in time spent in classroom sessions. Or, alternatively, the classroom session offered can be more specifically targeted to meet clear needs and general training can be delivered online. Employees will be more productive by having less work interrupted by classroom training events.

- **Compliance:** compliance tracking and reporting will improve.

- **Certifications:** you can track the professional certification and continuing education requirements of employees who work in fields where CE is required, and you can deliver content onsite at lower cost and with less disruption.

There will be other benefits specific to your organization. Make sure to think more about benefits than costs. Your senior leaders will respond much more readily to an explanation of what your organization will gain as opposed to what a technology solution will likely cost.

Need for speed

Delivery of Training to Employees More Quickly. One thing we can predict with some degree of certainty is that the pace of change we are seeing in this market will not slow down. This reality forces us to confront the fact that we have to make our employee training and development efforts match this pace.

Our employees need faster access to new information, training and development. Traditional classroom instruction models will not meet that need. We must find ways to deliver real time information to employees when they need it and where they need it, so they can apply learning at the moment of need. Technology-based training solutions represent an important step towards solving this important business problem for organizations of all sizes.

“Only 30% of strategic initiatives are successfully executed.”

HBR IdeaCast: Executing With Strategic Speed
Do you need to buy an LMS, or are there alternatives?

We get this question from time-to-time from prospective clients – usually when they get their IT teams involved in the decision-making process. Sometimes, organizations think they can build an LMS on their own. Before you go down the path of trying to build instead of buy an LMS, it’s important to understand some basic information about what an LMS does and does not do. Once you have a firm grasp of the core features and functionality of an LMS, you can make a more informed choice. If your organization does not need the functionality of an LMS, and your IT team has the time, resources and expertise needed to first build and then maintain and service a content delivery system, then building an alternative might be a viable option for your organization. So let’s start with the basics – what does an LMS actually do?

Reduced to the most basic functions, there are three things every learning management system allows an organization to do:

- Administer training programs.
- Deliver training and education courses and programs to employees.
- Document, track and report on the training activities of employees.

These three core functions seem pretty straightforward on their surface, but that appearance is somewhat misleading. LMS vendors have built-in expertise in crafting solutions to deliver these core functions and your IT team likely does not. For example, training content must be developed and delivered in a specific type of file format so the employee’s training progress is tracked and recorded. Does your internal IT team have experience with these file types and these standards? In other words, a self-made system might seem attractive to start, but by utilizing the expertise of a vendor, you can keep your internal IT resources focused on what they already do best – servicing your clients and customers on your services and solutions.
Do you know how your critical stakeholders are? Sometimes, this question seems so obvious it gets overlooked. But don’t make that mistake with your decision-making process. As you are working your way through the business problems, make sure you develop a clear understanding of who is impacted by both the problem and the potential solution. For each problem and solution, there will be different groups of employees affected by the training initiatives you help implement. Who are they, and what will their concerns and objectives be as you move through the decision making process?

Human Resources (HR)
Your HR Department may own employee training in your organization. If so, how will they react to a technology-based solution? Your HR team will likely have a different set of concerns that relate to record-keeping, tracking, reporting and compliance. Make sure you are prepared to answer their questions and address those legitimate business concerns with any proposed solution.

Training and Development
Your employee training function may or may not be a separate group or department. In many smaller organizations, employee training falls under HR. In many organizations employee training falls into the various functional departments like Sales or Operations. Make sure you are adequately addressing every employee training need and business challenge no matter who is responsible for the over all business function. Remember, your sales team will likely have very different training and performance support needs than your HR team. If your chosen solution cannot meet both sets of stakeholder needs, you will set the stage for becoming one of those dissatisfied LMS customer statistics we mentioned earlier.

CEO – Senior Leadership
Ultimately, senior leadership has to be on board with any employee training and development program. You will build senior leadership support one way – by building an effective business case. You make a compelling business case NOT with a mathematical ROI calculator, but by meticulously identifying the actual business challenges you are addressing and linking each element of your proposed solution to pieces of the challenges.

Informational Technology (IT)
Like any major application purchase, your IT team will want to know what is expected of them. If you are looking at an SaaS or cloud-based solution, you will significantly reduce the burden on your internal IT team. However, your IT team will still need to understand the level of support they might have to provide your employees or the end users in terms of upgrades or systems.

Every organization has its own unique culture. Are there other stakeholders in your organization you need to involve or consider?

If you are uncertain, ask! Go to each department head and ask them if they see anyone else that needs to be involved or consulted about the buying decision.

The last thing you need is to get close to finalizing a deal only to learn you’ve forgotten to involve an important stakeholder.
Learning management systems have evolved over the last several years. Many systems have a large number of features and functions, in fact the sheer volume of options and choices can get confusing and overwhelming. That’s why it’s critical to make sure you clearly understand the business problem you are trying to solve.

Once you can articulate and explain the business challenges you are facing in your employee training and development efforts, you can begin to make informed choices about the core functionality you need from a learning management system. Within the three core functions of an LMS, here are a few features and additional functions you will find, as well as, a brief overview of what each function can help you do.

**Administrations**

**Organize Employees into learning groups.** Most systems allow you to organize employees into logical groups based upon business needs. For instance, your organization might need employees organized by location or function. Most systems are flexible enough to allow you to place employees into multiple groups if necessary.

**Assignment of learning resources** based upon employee need. Different employees usually need different training resources. Most systems will allow you to assign specific learning resources to either groups of employees, or individuals as you deem necessary or appropriate.

**Classroom training management** is also an important feature of most systems today. While the need for technology-based training solutions meets many business needs, most organizations still need to deliver some training content in classroom settings. An effective LMS will allow you to bring all of your training management into one comprehensive system.

**Integration with other systems** is now a common function and feature of most LMS. With HRIS and payroll systems being routinely used by organizations of all sizes, most LMS now integrate with other HR systems to facilitate a single sign-on for employees and administrators alike to reduce “password” burnout and ease the administrative burden of maintaining multiple systems.

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**Learning Management System (LMS)**
A software application for the administration, documentation, tracking, reporting and delivery of education courses or training programs.

**Learning Content Management Systems (LCMS)**
A software application that includes the capability to develop content within the structure of the application.

The distinctions between LMS and LCMS was more relevant when the content development tools were the sole domain of web developers. With the emergence of so many high quality authoring tools that do not require any programming or code knowledge, the distinctions between and LMS and LCMS are not as important as they used to be.

**Authoring Tool**
An application or program that allows the user to generate e-learning content. Examples include Lectora, Captivate and Articulate.

**Mobile Learning**
Mobile Learning, sometimes referred to as mLearning, is a form of online training or performance support delivered to smart phones or tablet computers.

**Single Sign-On (SSO)**
A type of access control of multiple related, but independent software systems. With this type of access a user logs in once and gains access to all systems without being prompted to log in again at each of them.

**Classroom Management**
This allows you, your employees and instructors to register, track and manage training events.
SSL (Secure Sockets Layer)
The standard security technology for establishing an encrypted link between a web server and a browser. This link ensures that all data passed between the web server and browsers remain private and integral.

SCORM
SCORM is an acronym that stands for “Shareable Content Object Reference Model.” SCORM is a set of technical standards for e-learning software products and serves to make content work in multiple platforms.

AICC
AICC is an acronym that stands for “Aviation Industry Computer-Based Training Committee.” AICC specifications no longer apply exclusively to aviation specific content. The standards are now widely accepted and permit learning technology vendors to host and deliver a wide variety of content without regard to who developed the learning materials.

Tin Can
Tin Can is an API that is not dependent upon a constant web connection, but still allows for the complete tracking and reporting of learning on a wide range of devices including mobile platforms. This is the newest type of LMS standard on the market. It may gain wide acceptance due to the difference between it and SCORM and AICC, both of which require continuous web connections to function correctly, and neither of which were developed with mobile technology in mind.

HTML5
HTML5 is a type of code for delivery on the Internet. The “5” refers to the fifth generation of HTML, but what is most important in this generation is that video in the HTML5 format will play on virtually any device or browser, so you can publish video to both Windows and Mac users such as iPads and iPhones.

**Key Terms and Definitions**

**System Functionality**

Deliver training and education courses and programs to employees

An LMS is a specific type of application designed expressly to deliver training content to a designated audience, and every system on the market accomplishes this purpose.

AICC or SCORM are acronyms you will see, and these are terms that describe standards for how content will communicate information to your LMS. They allow the LMS to record, track and report your employees’ progress through the training. It is the LMS’ ability to host, deliver and then track this training data that truly sets it apart from other basic content servers or host environments.

Documenting, tracking and reporting

Every LMS on the market will generate some type of documentation and reporting about the learning activities of your employees. The real question isn’t whether the LMS you are considering will do that, but whether it will deliver the reports and documentation your organization needs.

Certification and continuing education tracking is an important feature many organizations need, particularly organizations in heavily regulated industries. Many LMS on the market offer very good tracking and reporting of your employees’ continuing education and certifications.

Self-service reporting is a feature available in most systems today. Your employees should be able to log in and look at reports about their own progress and – as appropriate – certification or continuing education credits.
ISO 27000
An Information Security Management Systems (ISMS) standard that provides best practice recommendations on information security management, risks and controls.

BizLibrary technology utilizes numerous methods to ensure the highest level of confidentiality, integrity and availability for our clients’ data; physical infrastructure designed to keep hackers out, application design using accepted best coding practices, high level monitoring, redundancy at all points, and ISO 27000 series based policies, standards and procedures.

As a system administrator you are able to easily allow and restrict user and course data by setting system privileges.

- Each user has a unique username and encrypted password.
- Assign reports and user groups controls to specific managers or supervisors.
- Allow course assignment privileges to specific users.

LMS Only or Fully Integrated Solution

One of the developments in the market is the availability of solutions that include a learning management system, a performance management system, an applicant tracking system, or other HR-oriented application of some type all in one big package. There is some appeal to these solutions, and these vendors certainly tout them as “easy” and a “one-stop” place for all of the HR technology needs. If only the reality were so simple.

Most vendors in this space started out offering one solution and added other solutions to their core offering. While this isn’t always the case, most of these vendors maintain their primary expertise in their first area, and they may or may not maintain the same commitment to their learning technology. It’s like going to a generalist instead of seeking out a specialist. Isn’t it logical that the specialist will have a deeper level of expertise in his or her area of focus?

Another important factor is the advances in the technology itself. For the most part, reputable vendors can integrate their solution with your current systems – either HRIS, performance or talent management, payroll, etc. Integration with your current system or systems can facilitate a single sign-on so you and your employees can log-in one time and access learning resources and other HR oriented information, resources or data.

In any event, with current technology advances, you no longer have to buy all of your HR technology solutions from one vendor. You can select the best solutions for your needs, and bring them together on your terms.

Exceptions will usually result with incompatible basic operating environments, but this evaluation ought to be a part of your due diligence and testing before purchase. Make sure your internal technical resources are available to ask and answer questions to ensure you can integrate with your chosen vendor, and if not, to help you explore acceptable work around solutions.
To the cloud?

Cloud-based solutions are certainly growing in popularity, and there are many very good reasons for it. When you hear a vendor tell you they offer a “cloud-based” solution, what they mean is a solution offered on-demand over the Internet using servers provided by the vendor. In other words, you, as the customer, don’t have to have any new hardware or software on your internal systems to take advantage of the services you are buying. SaaS, or “software as a solution” is another way of saying exactly the same thing.

The advantages of a cloud-based learning management system are pretty significant, especially for smaller organizations.

- Accessible over the Internet for anytime, anywhere use
- Lower costs with no upfront investment in hardware or software infrastructure
- Upgrades are part of the service and are seamless
- Saves your internal IT resources for work on your own business

If you choose to bring an LMS onto your own premises, be aware of the following potential risks:

- Maintenance costs of a new system
- Learning curve for your IT staff to service and support a new infrastructure
- Expensive upgrades and potential for becoming obsolete with rapid changes in technology
- Risk of lost time of your IT resources on your core business

One of the most often cited reasons for keeping an LMS on an organization’s own servers is security. With the advances in cyber security, cloud-based systems are as secure as any other web-connected systems. Further, the type of information contained in your LMS is not confidential nor can it be used for identity theft. An employee’s learning history will not (or should not) contain any personal identification information like a social security number. Usually clients use a work e-mail address, and most systems allow employees to set their own passwords. While we certainly recognize the importance of security and confidentiality, a learning management system is not usually a point of entry of someone with malicious intent. If security is a concern, make sure to cover this point during your due diligence process.

SCALABILITY

Deliver all of your learning resources from one central location, whether it’s an employee handbook, a custom created e-learning course or off-the-shelf courses and video programs.

Get the benefits of live, instructor-led sessions without the travel and business disruptions sometimes associated with instructor-led training. You can host, track, manage and report on virtual instructor-led training events directly from the LMS.

The virtual classroom also allows for sessions to be recorded for later playback. Make sure everyone gets the same content in real-time – regardless of their location.

Employees and supervisors can easily monitor the training activity associated with regulatory compliance, CEU’s or internal learning plans.

Each employee has a unique username and encrypted password.

Assign reports and user group controls to specific managers or supervisors.
The biggest issues with video production are instructional design and the technical expertise to shoot and edit the video files. We have several clients who are making great use of their own video content to supplement their off-the-shelf content or to provide quick release content through our LMS.

You may also have existing classroom content that can be converted to online training. Many of our clients use their existing content as a starting point, but it is important to objectively evaluate your current content to ensure that it will translate into an effective online learning experience for your employees.

So for many prospective LMS buyers it’s less of an either/or choice, and more of a can I do both – buy content AND use our own?

Today’s off-the-shelf content is a lot different than the content you might have seen 10, or even five, years ago.

First, streaming video is moving to the forefront of online training. Organizations are demanding training content that looks and feels more like the content their employees absorb away from work when they look up information on the Internet. They are not watching three hour slide shows with interactive buttons. They largely watch videos, and they usually watch fairly short videos. In fact, everything we do seems to be coming in shorter and faster bursts of highly concentrated information and data. Our employee training needs to keep pace to remain relevant. Many online training vendors are catching on, so there is a rapidly emerging market for high quality (HD) employee training video that is engaging and effective. It’s hard to reproduce the production values and quality you can find in some of this online content on your own.

Online training content might be easy to “construct,” but it’s a real challenge to build an effective online learning experience. What the marketing materials completely fail to explain when they tout the ease of use of their respective tools, is that none of the tools come equipped with instructional design expertise, graphics design expertise, user interface expertise or development expertise. Admittedly, the tools (nearly all of them, anyway) do a decent job of diminishing the need for a developer. But, you still need to develop content using and applying sound instructional design principles, quality graphic design concepts and best practices in user interface design. There are not many HR teams with the resident expertise in all of these areas. If your organization is lucky enough to be one of them, and they do exist, the next issue is usually time. Does your team have the time needed to design, build and then maintain your own content?

With the rapid advances in video technology, many organizations can quickly shoot, edit and publish their own short video courses. This is the most likely way organizations will be developing their own custom content in the future.

Content Matters

While this is a guide about selecting a technology platform, don’t lose sight of the fact that the platform is exactly that – a platform that you will use to deliver training content to your employees. Make sure you consider carefully how you will provide the content you are going to deliver.

You might be surprised to find out how many organizations go into this process without understanding that the LMS is only one part of the online employee training system. You still need to have training resources to deliver. So – what are you planning to do about content? You have two choices – buy it or build it.

Build it

Buy it
E-Learning is a common term associated with online training content. This refers to a type of content that resembles slide shows that include some sort of interactivity built into the content. Many of the newer courses now include video elements, too. There are also simulations that are very good learning experiences for your employees. As a general rule, while e-Learning courses have traditionally been longer, current best practices in design are making these courses shorter, more direct and adding a variety of more engaging elements.

As you explore potential LMS partners, therefore, it’s going to be crucial to keep in mind how you will access or add content to the LMS you are looking to buy.

Additionally, the off-the-shelf content is usually produced by true subject matter experts. So rather than building your own sales training, you can get online sales training from the world’s leading sales trainers delivered right to your employees. And this is true for virtually any subject or topic you need for your employee training program.

Some of the most successful employee training programs our clients implement use a bit of both – custom built content and off-the-shelf content. The usual determining factor is the accessibility of subject matter expertise and the need for immediate distribution. For instance, if you have some time, you may be able to search through a catalog of courses and build an effective blended curriculum of leadership development courses from leading experts and your own classroom materials to emphasize the unique values and cultural anchors your employees can best learn from each other or in a classroom setting. On the other hand, you may need to get a new product to market rapidly, and the only way to get training to your field sales team is to make a series of short videos explaining the new product, its features and how to sell it. Then provide classroom or a virtual classroom session to reinforce the lessons offered in the rapidly developed video sessions you prepared.
Vendor Selection

Strategy & Implementation

What’s Next?

So – we’ve established our business need. We understand the issues we face, and we know why we need an automated learning solution for our employee training program. It’s really important here to bear in mind that you do NOT have to have every single question answered about what you want or need a system to do before you move forward. You don’t even have to know for sure whether you need a cloud-based solution or not. If you can tell someone the basic business challenges you are facing, and why you are interested in learning more about a technology solution, you are ready to start looking at potential vendors. But this is where things can get a bit slippery, and this is where you can get all sorts of “unusual” or even just flat out bad advice.

In the interest of full and complete disclosure, remember that we here at BizLibrary ARE an LMS vendor. However, we hope you find this next section to be reasonably neutral in tone and helpful in terms of advice and content. We would be very happy to be included in your selection process, but it’s more important to us that you more forward with some sound advice and solid information in your hands as you make this very important decision for your company.

There are hundreds of LMS vendors on the market today, so you will have plenty of choices and options. That’s not really the problem. The problem is narrowing down this vast and sometimes confusing market to a manageable number of vendors – a short list – from which you can make a final decision. We believe there are five key factors you should use to narrow down your list of potential vendors. Here they are:

• Free trial and system demo

• Familiarity with your market by
  • Company size
  • Level of experience with e-learning/online training
  • Familiar with your business challenges
  • Industry experience

• Industry recognition

• Client testimonials/recommendations

• Case studies/use cases

Questions You Should Ask

Are you rolling out e-learning to your entire organization?
If so, you have a wide audience base with a variety of needs.

Do you have a key training initiative that targets a select group within your employee population?
The needs of this group would be more focused. For example, engineers might need project management training to meet ongoing certification requirements.

Is my e-learning program tied into this audience’s strategic initiatives?
If not, you may have difficulty getting the level of participation you need.

Is the e-learning offered to each group linked clearly to their day-to-day performance and job role?
Adults learn best when they see a clear and direct link between training and job performance.

Are there varying degrees of comfort with technology among groups of employees or departments?
E-learning and online training represents a significant change in the way they are used to learning. Make sure that you are clearly and consistently communicating the benefits of this change and share success stories as employees make progress.

Have we communicated the benefits of our e-learning program to various groups of employees or departments?
People really need to know the benefits to embrace any kind of change.

Are there any specific areas of resistance to e-learning among groups of employees or departments we need to address?
This is 100% normal. Just prepare for it and plan to engage the key stakeholders with clear and repeated value statements about how the training will benefit them.
Always get a one-on-one system demo and free 30-day trial of the LMS before you buy it. A free trial should be easy to arrange, simple to set up and quick to get started. The free trial will be a great test for you to learn – first hand – how the vendor will behave in the event you choose to buy their solution. Also – make sure the trial you get is of the ACTUAL solution, not some watered down version or demo version. See the actual product you are going to buy. Here are things you want to look for during your trial:

**Ease of use for your employees:**
- How easy is the system to start (log in)?
- Is the interface intuitive?
- Can employees quickly see the courses they need to take?

**Technical support:**
- If an employee needs help, can they get it quickly?
- Is the technical advice/solution easy to follow and implement?
- Are there going to be technical support fees?

**Technical requirements:**
- Do the computers at workstations need anything special?
- Will the content work well on multiple devices?

**Ease of use for administrators (you):**
- How easy are reports to access?
- Is the administrative interface easy to use?

**How easy was the trial to implement?**
- If the trial is hard to implement, what do think that tells you about the ease of implementing the solution itself?
- What implementation support will you get?
- Are there separate implementation fees?

**Can the system be used without a lot of training?**
- If not, can you access the training?
- Is there a fee for the training?

**What service and support does the vendor provide?**
- Will we have an account representative to call?
- Are they easy to reach?
- Will there be help getting the program started?
- Do we have regular program reviews?

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**Should I Hire a Consultant?**

Essentially, you have two choices as you navigate the buying process: go through the process on your own, or hire a consultant to help you.

**Using a Consultant – From a Consultant**

There are two major advantages of using an outside consultant: experience and knowledge. Here is a very good summary of the benefits of using a consultant from the blog – *Elearning 24/7*

- **Knowledge and expertise already exists.** Many consultants, know the market and thus are able to jump right in and move at a quicker pace than say someone who is new or in the process of looking around.
- **Looking for a system or authoring tool can be overwhelming.** With over 550 LMSs on the market and more than 156 authoring tools finding the right one can be an exercise in pain and confusion. A consultant will handle it for you and thus enable you to do other things.
- **Eliminates creating RFPs, shooting them out everywhere and waiting for a response.** Plus it eliminates the sales people following up with you and for many people they do not want to deal with that.
- **Time equals money** and if you can lower the time spent, the cost for hiring some consultants will be well spent.

Craig Weiss is the author of E-Learning 24/7 Blog and is a leading consultant in the field.

**On Your Own – It Can be Done!**

You don’t have to hire a consultant. While this process can be intimidating, there are vendors in the market who are helpful and will work with in a consultative capacity as you make your selection. The key to making a successful choice – even if you work with a consultant, is to have a plan, understand your business challenges and be willing to ask questions. These three key tips will help you maintain a focus on your organization’s needs and goals, and will serve as excellent guidelines for your decision-making process.
There are several different ways to think about your market, and each carries a different set of challenges. When choosing an LMS vendor and online training partner it's important that in addition to having a good understanding of your business needs, they also are familiar with your organization's market. Some market considerations are:

**Company size**

Small and mid-size companies are different than large, enterprise organizations and are in many cases an underserved market. Many vendors choose to focus on new customers in the large company market space. Contracts with really large companies with tens of thousands of employees are simply worth more than contracts with smaller organizations.

Many vendors with a large company - enterprise focus have a “light” or “SMB” version of their solution for smaller organizations - fewer features and functions. This type of offering reflects a fundamental misunderstanding of the employee training challenges faced by small and growing companies. It’s not that the employee development challenges are less complicated. In fact, smaller organizations frequently face employee training and development challenges more complex and challenging than their FORTUNE 1000 peers. It’s important to find a vendor that can help craft a technology solution built upon the experience of working in the fluid and innovative cultures that exist more frequently in smaller organizations.

**Industry experience**

There are specific challenges in different industries. Regulatory challenges loom large in banking, finance and healthcare. Retail organizations are usually widely scattered and experience high rates of turnover. If your chosen vendor is not accustomed to helping organizations with the types of routine business challenges faced by organizations in your industry, do you want to be the organization educating them?

**Familiar with your business challenges**

There are a myriad of business challenges that an automated, web-based training solution can address. The variety of systems and system designs also means that not every system treats every business problems the same way. For instance, some systems do a great job of helping organizations manage things like classroom and virtual classroom training sessions, or employee certifications. Other systems may not have been designed with those specific functions as a central part of the offering. So make sure your selected vendor has previous experience helping organizations solve the business problems you are trying to solve. Look for case studies and ask for client referrals!

**Experience with e-learning and online training**

Organizations usually fall into three very broad categories in terms of their experience level with online training: experienced and looking for a change, experienced and are now very resistant to trying it again, or have never tried it before. When you are introducing an online training solution to employees who have never used it before, there will be challenges that are unique and different than those faced by organizations simply making a change or those organizations that have had bad past experiences.

When online training is new, you need to work through a series of communications, change management and marketing challenges that are unique to your situation. Make sure your chosen vendor has experience with these implementation and program launch challenges. Likewise, if you’ve had bad past experiences, make sure you work closely with a vendor who can provide a clear marketing message to your skeptical employees about the quality and value of the solution you’ve chosen.
RFP or the dreaded “request for proposal” is a common element of software and systems purchases for enterprise-sized organizations. But is an RFP appropriate or helpful for smaller organizations? Quite a few small and mid-size companies use the RFP process, and they are usually modeled on one or two templates found online. The problem with these templates is that they are built by vendors primarily serving the enterprise market, and these templates can serve to add needless layers of complexity to the process.

The RFP process can be helpful when an organization needs to consider a wide variety of features and functions or to serve the needs of multiple stakeholders within an organization such as multiple departments, divisions, locations, or even multiple training teams or groups. The vast majority of smaller organizations can state their business problems more clearly and have far fewer stakeholders involved in the decision-making process. Furthermore, the RFP templates are exactly that – a template. These are really nothing more than checklists of features that may have nothing to do with the actual business challenges facing your organization. Therefore, the RFP only adds confusion to the process where clarity is of primary importance.

The other big drawback to using an RFP for smaller organizations is that many high quality vendors will simply not participate in the RFP process. The vendors that are set up to respond to RFPs tend to be larger vendors, and that’s probably why they built the templates that are so easy to find. Vendors that focus on smaller organizations are likely not interested in responding to complex RFP’s because they can spend their time actually talking to prospects and clients rather than working through a complicated series of checklist items that probably don’t reflect the actual business needs or requirements of the company submitting the RPF in the first place.

This checklist approach to a feature set reflected in the vast majority of RFP’s also completely misses the chance for meaningful conversations with engaged vendors or consultants who might be able to uncover additional business issues or help you develop a different take on your solution. By limiting your vendor choices to vendors who reply to a list of available features, you lose the chance to talk to people who might have a superior solution because you have not thought of your problems in the same ways in which the vendor has developed their solutions.
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