Seven Common Mistakes When Choosing and LMS

Learning Management Selection

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Lack of Assessment

Choosing a Learning Management System is a difficult and time-consuming process. In addition, your LMS is so far-reaching that a change once you've adopted the system is virtually out of the question, for reasons of both time and money. So the best approach to the choice of LMS is to avoid mistakes on the front end and when you are just learning to use the system. As with any learning and development project, assessment at the outset will save time and stress going forward. Let's examine the LMS mistake that we will call lack of assessment.

Before choosing an LMS, consider this question: would you launch a curriculum or series of courses without analyzing your audience, even if it's just a brief survey? Probably not, so why launch an LMS without examining your organization's needs? If you do choose a system and put it in place without this assessment, you'll end up with a system that "misfires" and does not meet the needs of either your learning and development group or the entire organization.

To start with, look at your organization as a whole. How big is it? How many users can you expect to have? Does your user group only include employees, or are you going to extend learning to clients, suppliers, or vendors? There are LMS systems that cater to smaller populations as well as those that are built to service large groups in multiple locations. Do your research both on your organization and the LMS vendors that may be able to serve it effectively.

Next, examine the training needs of the organization. Do you see a need for a great deal of just-in-time e-learning or a comprehensive e-learning platform? Do you think that your Subject Matter Experts (SMEs) are going to be developing training and using your department to "QA" and launch the pieces? If so, you may need to consider an LCMS, or Learning Content Management System, that offers a design and packaging module for online content. Or is your organization going to rely more heavily on classroom training and use the LMS for scheduling, tracking, and curriculum management? Alternatively, you may be planning a hybrid training plan, where classroom participants may need to log in to the LMS to access testing, quick reference guides, or tutorials. All of these items need to be considered before you make your choice, and should guide your research process.

Let's look back at an important assessment item: tracking and management. Some organizations are required by law to track certain types of training, such as regulatory or safety training. Is your group one of these organizations? Are you going to have to produce completion reports quickly and efficiently? Will it be necessary to know who hasn't completed required training and to send those groups reminders about the deadlines? This is a very important feature in LMS choice and should also be an overarching theme in your selection process if your organization fits this description. You wouldn't want to end up with a system that is difficult to mine for information if you have to produce reports for regulatory purposes.

Finally, can your organization provide "off the shelf" training from a provider library to cover many of its needs? For example, sales, customer service, management, leadership, and even HR training can be part of the LMS vendor's library - and part of your contract for service. When you are able to choose an LMS with this type of service, you can leave the updates, distribution, and tracking of generic training to the system and concentrate your L&D group on other tasks. But this type of setup will only work if off the shelf courses will fit your organization and its populations.

Assessment of your organization can be a larger-than-life process, so we are going to move on to another type of assessment in our next article, which is the assessment of the organizational structure and readiness for LMS interactions.

Lack of Assessment Part 2 / Organizational Structure and Readiness

We've discussed assessing the organization's needs as a whole before choosing an LMS. But the second part of assessment involves taking a realistic look at your organization's technology and readiness before making your final decision. This type of analysis and assessment may turn up things that you might not want to hear, but you'll be more prepared to roll your system when you know that it's right for the organization. In other words, you may be looking for the "bells and whistles" but the organization may not quite be ready for that.

The first step in this level of assessment is to examine the technology that exists within the organization right now. If you're planning on using the LMS heavily for online training, especially training with videos and graphics, you'll need plenty of bandwidth for the LMS and its learners. Plus, keep in mind that you may roll out quite a bit of training to begin with and these courses may hit a large population, who, in turn, will make a big hit on the organization's technology infrastructure. Another aspect of this technical assessment is the users themselves: is there a large number of remote learners who will log in using a remote portal? Or are all of the learners in locations that are serviced by a large server? These items could have an impact on which LMS you choose. One of the best ways to accurately access the organization's technical readiness is to involve the IT department from the very beginning. This way, you can plan your LMS choice and rollout together - and avoid any surprises.

Next, you must take a look at what we will call the organization's "self awareness" structure. For example, can managers be given the responsibility of helping people log in to the LMS and make choices about their training? Or, are will it be necessary for your department to create specific curriculum paths that are very well self-directed? Going further than this, will managers resent this responsibility?

But what about the readiness of the learners themselves? Are they technically proficient? Even in our technological age, there are still organizations with populations that are not ready to trust their training plans to the computer, or even take classes online. On the other hand, you may have a population that is into every technological advance and enjoys a new technical challenge. These learners may even have gone to college online and may spend time every day in social networks, software applications, and Internet exploration. Most likely, your organization has a hybrid group that encompasses many different types of learners. The reason for this discussion is that your LMS choice is directly related to this organizational "self awareness". Depending on your findings, you may need to choose an LMS that is simple and intuitive or one that has more complex features. In other words, don't alienate your audience by your choice - have them in mind when you begin viewing demos and sales presentations.

Finally, you'll need to examine the organization's operations structure. Does everyone in the organization have a computer or laptop? Or are there a large number of customer-facing associates who may have a computer but not much time to log in and search for courses. On the other hand, you could have an industrial organization where many people have access to a few computers. If this is the case, your LMS needs to be highly useful, fast, and intuitive. In relation to your operations structure, will you find it necessary to go on the road to explain your LMS, or can it be done via online tutorials and quick reference guides? Again, these organizational aspects should influence your choice of Learning Management Systems.

Now that you have assessed from both a human and technological standpoint, you're ready to start thinking about the future of learning and development at your organization.

Don't Forget to Chart the Future

Your LMS assessment has turned up a great deal of information about your organization as well as its learners, managers, operations, and infrastructure. As we've discussed, leaving out this assessment can be a costly mistake. But moving forward, you'll want to examine the potential future paths for learning at the organization, both as a whole and within your Learning and Development group. If you forget to chart the future, even hypothetically, you can make mistakes in the choice of your LMS that will show up later, when it's too late to make a big change. Let's find out how you can avoid this mistake.

In your assessment phase, you began working with your IT department. Remember to keep them on board as a partner indefinitely, and one of the ways you can do this is to discuss their future plans. Will there be an opportunity to add bandwidth at some point? If so, can L&D "piggyback" on that in order to enhance the learner experience through the LMS? If so, you may be able to customize online training and make it highly interactive. Plus, as we will discuss in a moment, you may be able to add further "bells and whistles" like synchronous training and social media. The point here is to discuss the plans that IT has for the future and how the LMS and Learning and Development can fit into those plans.

Next, look at the growth path for Learning and Development. Right now, you may have a lean staff and need to rely on off-the-shelf training provided by a vendor. But your future plan may be to move development and delivery in house, where a team of designers will create engaging learning that is built specifically for your learners. If this is the case, you may want to select an LMS that offers a Content Management module that can be added in the future. Plus, you may be planning to add synchronous classroom training, web conferencing, or even social media such as blogs, chat, and discussion threads. If so, you'll want to look at LMS vendors that are aware that the future may be in Social Learning Management as well as traditional. In the traditional, classroom arena you may not have a great deal of scheduling or many facilities, either, but that could change, as well. All of your plans will impact your LMS choice, so you should be prepared to ask your vendors if they can accommodate you in the future as well as right now.

In terms of the organization, involve your executive sponsor in a discussion about future reporting needs. For example, if the organization invests in an LMS, will the executive team want to see concrete reports on course attendance, learner progress, and even ROI? What about regulatory training? Is your industry one that is faced with changing regulations that will require more detailed reporting on course completions and regulatory offerings? If your organization is moving in these directions, you'll need to demo LMSs that offer a great deal of reporting features and that can also partner with vendors or your in house developers to provide a higher number of courses in the future. And keep in mind that reporting features are only going to be as good as your LMS administration, so be sure to choose a reporting module that is easily administered and can be accessed by various members of the L&D department if necessary.

Finally, take a serious look at the possibility of adding users in the future. This means users within the organization as well as the potential for adding vendors, suppliers, or even clients. An addition in users typically signifies that the L&D group will be in for more courses, scheduling, facilities, and user setups, so be sure to look at systems that easily allow changes in these areas.

The discussion about the organization's future is very important, mainly because you'll need to "grill" your LMS vendors on their ability to grow with you in the future. Keep in mind that most vendors will tell you that they can grow with you, but use a critical eye on the features and infrastructure that you may not need to use right away but will need to use in the future.

Next, we'll move into the demo and "test drives" phase, which is a point where you and your team will need to be highly aware and highly critical of systems and their sales forces.

Test Drives and Demos

You've taken the time to assess the current state of the organization, as well as its future plans. In addition, you've examined the future of Learning and Development in relation to your choice of a Learning Management System. Now your vendors of choice will begin soliciting your group to view demos and sales presentations, which in themselves are necessary in your decision making process. But there are some pitfalls in the test drive and demo phase, so let's take a look at these problems and how you can avoid making them.

Have you ever heard of the "horns and halos" concept? Typically it's a hiring phenomenon, but it can also apply to your LMS selection process. For example, if you've heard a couple of "negatives" about one of your vendors, avoid putting horns on them and making a snap judgment. Give them a chance in spite of what you've seen, heard, or read. On the other side of this, don't place a halo on a vendor just because someone tells you they are the best or you read enough research telling you they are the best. Remember that what works for one organization may not work for another. To avoid the "horns and halos" effect, listen to what your potential vendors have to say and make your evaluation based on that.

Another mistake that can be made during the demo phase is going by "feel". Some people, especially HR and T&D people, tend to be "feelers" versus "thinkers". This is not a generalization, nor is it a bad thing. As T&D people, we are naturally aware of others and can go by feel, especially when we are standing in front of a classroom or designing training. But the LMS decision should not be one that is made based on feel. To avoid this issue, create a review panel that consists of LMS users, key IT people, managers, your own department members, HR staff, and an executive sponsor. This way, your review of vendors will keep the facts in focus and help make a decision based on those facts - and how the vendor's system will impact your organization.

When you're ready for a demo, don't settle for a generic one. Give your vendor an overall view of your organization as it exists now, as well as how it may grow in the future. Provide a list of your groups' wants and needs, along with its special problems and issues, such as non-technical audiences or lower "self awareness" in regard to learning. Then ask the vendor to show your review group how its system can impact these issues. If you start out this way, you'll show the vendor that you want to know specifically how their system works for your organization.

In addition to the list of items you'll provide your vendor beforehand, create a "real life" list of scenarios to present during the demo. It's a nice way to put potential vendors "on the spot" and have them in the mindset of helping you overcome your problems from day one. By seeing a vendor respond in a demo, you'll get an idea of how they might respond in real life. If you skip these steps, you may end up with a generic demo that "sells" you on features that you might not be able to use.

Finally, when you've seen enough demos, create a short list of finalists. Make sure that your review group or panel knows all of the pros and cons for each system before the next round of meetings. This way, each group member can formulate further questions and situations for the vendor. Plus, you'll want to ask potential vendors to provide specific proposals that include contract details, specifications, customizations, and even costs at this point. And don't forget to have your review panel read each proposal to avoid small print and any surprises.

By taking the time to step through your demo process in an orderly and factual manner, you'll be able to make a decision that is beneficial for both your organization and the vendor. Now we'll move on to the beginning of your relationship with your selected LMS vendor.

Money Matters

Now that you've narrowed down your Learning Management System choices, it's easy to embark on a honeymoon of sorts. After all, you've put quite a bit of work into choosing a system and vendor that work for your organization - a perfect match. But there are problems that can occur at this stage, and the first set of problems can be financial. When you've chosen your LMS or are close to choosing it, remember that money matters.

One of the first mistakes you can make is paying too much money at the outset or implementation of your LMS. Simply put, it's a good idea to be aware of the charges you'll receive for each feature or implementation milestone. This is why we've already discussed the importance of reading and understanding the contract and charges, and having your selection team do the same. Also, know how much money you'll have to put into training for your team, such as daily training charges, instructor expenses, and even location charges. Don't get surprised by the amount of money you'll have to feed into the system at the beginning, and don't pay too much.

On the other side of spending too much money is not spending enough, so don't scrimp and save on the front end if you can avoid it. The old saying, "you get what you pay for" rings very true when you select an LMS. For example, if certain features are part of the initial rollout, take them even if you don't plan to use them right away. A customization, which we will discuss in a moment, can cost a great deal of time and money. In another example, don't skip training because it's too expensive. Your LMS vendor most likely has a training team that specializes in helping organizations implement their systems, so take advantage of the service. If you skip initial training because of the expense, you'll end up losing in the long run by either having to fix your mistakes or having the vendor come in to fix them for you.

As we've mentioned, customizations almost inevitably come with a Learning Management System. But beware of making customizations that you should have discovered in your front-end assessment. If you skipped the initial analysis, you may end up being forced to customize to fit certain organizational requirements into the LMS. The customization process, which bears repeating, can be costly in both time and money. Now that you're a client, your vendor will put developers, business analysts, and even implementation consultants on your customization, depending on how big it is. Plus, charges for developers and analysts may be hourly and only estimated to start with. So if you customize, be aware of the cost and time involved, and then make a decision about the customization. Plus, if you keep your IT team involved, they may be able to help you come up with a workaround.

Finally, if you are offering off-the-shelf training, especially from a vendor in addition to the LMS vendor, be aware of any per-head costs that may be assessed for the training - and don't get caught without enough course accesses for your learners. As part of your initial assessment, you should accurately count how many people may need the off-the-shelf courses. On the other hand, be aware of how much your LMS vendor may charge for its library at the outset, as well as any additional learner fees above the number you've already discussed.

The point here is to assess each vendor for the charges that may come at the outset, during the implementation, or later in your relationship with them. Although it is impossible to know when a change or customization may have to be made, you can at least be aware of the possibility and of the charges that may be associated.

Next, we will look at the administration of your LMS after it has been selected.

Administration

Even before you've made your LMS selection, it may be a good idea to make some decisions on the administration of the system. Failure to do so may lead to complications at every phase of your rollout. Plus, you may find that early decisions about administration may help you make a better LMS choice. Let's look at some potential issues in administration.

LMS Administration is one thing, but correct administration is certainly another. The first rule to remember about and LMS is that no matter how good it is, it's only as good as the data that goes into it. And one way to avoid this mistake is to plan the initial data entry as well as entry going forward.

One of the first things you should understand is how data is going to get into the system to begin with and on an ongoing basis. Don't leave the understanding of this step to your IT department, human resources, or your vendor. For example, will the system cycle its employee data from the organization's HRMS system? Will the LMS pick up new associates at regular intervals via an HRMS upload? Or are there simply not enough employees to use an automated data load? If you're planning on offering training to vendors, suppliers, or clients, how will their data be entered and maintained? These are all questions that you can ask your potential LMS providers before you sign your contracts.

Next, how is data related to courses, schedules, facilities, and instructors going to be entered and managed? The size of this task depends on the size of your organization and L&D team, but this is also a data process that needs to be correct and standard - both at the beginning and as you use your system. If this data entry is to be a manual process, how do you plan to do it? For example, some organizations may take L&D staff off of their regular duties and place them on data entry for a few days. If this isn't possible, do you need to bring in people from other departments or even temps? Plus, you'll need to know just how many entries you're talking about, so be aware of the data entry process from your potential LMS vendors.

When you are considering the data entry, you should also know what standard fields may exist in your LMS and how many characters they are allowed. For example, if your course names are too long for the LMS, it may be time to shorten or rename them. The same goes for facilities. The best thing to do is to inquire about these items with potential vendors, and ask them how other clients have dealt with the issue. It may seem like spending too much time on an inconsequential detail, but remember that all data entered should be standard and have a standard naming convention. That way, anyone who inputs data knows what to do and anyone who logs into the LMS can find what they are looking for.

Another decision that you'll need to make before implementation is how the LMS is going to be administered. For example, some organizations have one person whose full-time job is LMS administration, while others spread duties to different personnel. In addition, you'll probably want to decide which L&D department will manage the LMS.

Finally, what is the UAT, or User Acceptance Testing, plan for the LMS once it's in place? Your vendor can help you with this, but it may be a good idea to plan before you make your decision. The idea is to make sure that you can efficiently and quickly test data before your implementation phase is over - and before changes may cost extra money.

When you're looking at administration decisions, both before and after you select your system, be aware of these issues and the problems they can cause. And remember that if your data is unstructured, non-standard, and entered poorly, your LMS will not be a great investment.

Failure to Reassess

A reassessment of your LMS definitely takes you beyond the selection process. This step is intended to help you see how things are going "officially" after you've rolled out the system. After all, you took plenty of time to analyze the organization, its learners, its operations, and its technology even before you began seeing vendor demos. You owe it to your group as well as the organization as a whole to take a deep look at the success of your LMS choice. If you don't take the time to set a reassessment period, you may find that things are going wrong when it's too late to do anything about it, or at least too late to do anything cost-effective about it. In addition, you may find opportunities to utilize the LMS and its features even better than when you first rolled the system.

Remember your examination of potential future paths for the organization and Learning and Development? Take a look at this information to begin your reassessment. Is the organization on track to meeting its potential paths, or is it still some ways off? What about your L&D organization? Are you ready to begin creating and deploying your own content, or has that been going on for some time? The reason you should look at this first is that your comparison between where you are now and where you want to be may have an effect on the rest of your assessment.

Second, take a look at the learners and their managers, just as you did at the beginning. How is this group reacting to the LMS and online learning? What types of issues are they having? For example, do they find that access is difficult because of job limitations or because they don't feel comfortable navigating the system? Or have they jumped into being LMS users with no problems? In the course area, are they taking and completing courses? Are they making progress on learning paths or curricula if you set those up at the beginning? This is a point where the reporting features of the LMS will come in handy if you haven't already used them.

Revisit the technical and operations structures, as well. For example, is the current technology and bandwidth working, or are there some issues with speed or connectivity? Are remote users having trouble logging in and staying logged in, or are things going smoothly for them? Has any technology been added that might be useful for the LMS? Does your IT department have any suggestions about the best and most efficient use of the system?

Your reassessment milestone date is a good time to review costs and administration. In relation to cost, you'll probably have a good handle on it but look at where you are spending your money on the LMS. Can these areas be fixed or updated to be more efficient? Overall, are you spending too much money, too little, or is spending on track? And through your reassessment you'll be able to tell if your money is being well spent. In administration, does your original plan work for the organization or is it time to change? For example, you may find that having too many hands in the LMS is slowing things down or creating data problems. On the other hand, you may find that having one person administer the system is working well.

Finally, reassess where your vendor is. For example, do they have new features or upgrades that fit your organization? Has their cost structure changed? Is it possible to get more training for a little less money than before? Has the vendor added a testing engine, a survey feature, content management, or social learning management features? Keep in touch with your vendor and be aware of what they are doing - this way, you'll get the best new features when they roll out.

In this series, we took a detailed look at the mistakes that can be made when you are selecting an LMS. If you try to avoid these mistakes, you'll find that your LMS selection process goes smoothly - and that you choose an LMS that works very well for your organization, both as a whole and at the Learning and Development level.

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

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Blended learning is the philosophy on which the company was founded. Our training methodology, integrating theory with practice using our own very powerful training tools, creates a uniquely exciting and effective learning environment. The result pays immediate dividends in the retention of newly-learned concepts and their practical application in the financial marketplace.

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