382 TIPS

on the SELECTION of an LMS or LCMS

THE eLEARNING GUILD

Table of Contents

I. How to Use These Tips

A. Introduction

In early 2006, The eLearning Guild asked its members for their best tips on selection, implementation, and management of learning management and learning content management systems (LMS and LCMS). A total of 417 members contributed usable tips. We have sorted and edited these tips, in order to publish them as three separate eBooks. This book presents 382 tips on LMS/LCMS selection.

B. The tips

As we have done with our earlier publications on success with LMS/LCMS and with online instruction, we have organized the tips into categories and subcategories. The editors assigned tips to categories according to the main theme or intent of each tip. This was not simple, since many of the tips contained multiple ideas and some were quite lengthy. We recognize that many readers will disagree with our categories and our assignments.

The Selection tips fall into eight major groups:

1. Comprehensive tips: This is the largest single group, about a fourth of the total. Each of these tips address several key areas or best practices.
2. Tips for matching LMS features to business and learning needs: This is also a large group, nearly as large as the comprehensive tips. It reflects the concern that respondents had for dealing with the tremendous number of features in most LMS/LCMS offerings.
3. Tips for LMS review and evaluation procedures or process: These tips provide best practices for organizing your selection process, and various selection criteria.
4. Tips for matching the LMS/LCMS to the users: Since others will use the LMS or LCMS, it is critical to consider their needs as part of the selection process.
5. Tips for matching LMS/LCMS features to formal business objectives and requirements: Many tipsters offered best practice ideas for bringing LMS/LCMS choice in line with the mission of the organization.
6. Tips for obtaining stakeholder involvement and support: An LMS or LCMS is the concern of many groups and decision-makers. These stakeholders must be involved in the selection process in a meaningful way.
7. Tips for managing vendor involvement: The character of the vendor and your relationship to the vendor can be a significant element in the success of your implementation.
8. "Other" tips: Some tips simply didn't fit any category we could come up with, but they are valid and worth considering.

C. The tipsters

As in all our eBooks, we credit the members who contributed their ideas (the Tipsters). Most of the tips are followed by a number indicating the origin, and an indexed list of Tipsters appears at the end of this book. All tips are in the Tipster's own words, with editing only for spelling, grammar, and punctuation where needed.

We deeply appreciate the effort that contributors made to create these tips. We hope you find at least one valuable idea — and we hope many valuable ideas — that can help you as you select your LMS or LCMS.

II. Comprehensive tips for LMS selection

FOCUS: Product features and user requirements

Who will be the end users of the system (employees, students, etc)? Budget (ROI). Selecting the right technology based on an organization's requirement. Customization vs. developing a new system right from scratch. What all the LMS/LCMS features are. — 10

I think you need to be very creative in thinking about how your system will be used throughout the company. Who will want to post training? Will they want reports? Individuals will want to know what classes they have taken. VPs will want to know who has taken a certain course. HR will want data on completion of mandatory compliance training. What kind of data must be collected? Assessments? Self-tests? Feedback forms? Who should have access to these reports and data? Do you want learning paths? Should they be enforced? Should prerequisites be enforced? Can you add classes you want to take to a "wish list" for later consumption? Can you add all of the classes from a learning path to that "wish list"? How will learners search for classes? What if they don't know if a class exists? Will your learners be internal only, or also customers and partners? Will some classes be only for some of these audiences? How will you restrict access? How will you take care of payments? Will the LMS have only online courses, or schedule live events as well?" — 13

A LMS must match both technical and instructional criteria for a given organization, given that such software is often quite an investment. One primary consideration I advise people to explore is whether or not there are existing courses which would have to be migrated to the new LMS. Beyond this, I think it is additionally critical to match the complexity of the LMS with the technical support available within the organization, both in terms of supporting the service itself and in terms of supporting the development requirements of the courses. — 70

Before selecting an LMS, make sure that you do your research. Make sure that all components that you want in an LMS are in the program, and that the product is user-friendly and cost effective. — 88

Make sure that it works with your registration system and any other college-wide system such as email portals or homepage portal. Is there training for both faculty and administrative sides available from the company before you agree to the system. Is the price they are charging for the LMS worth the benefit they will provide? How much technical help do you need with the system, and how does this LMS provide the help? Is there student training to get your students up to speed on how to use the system? Is the system intuitive to use or do you have to look up every procedure when you want to create courses or add assignments, etc.? — 253

Map the facilities and tools of the LMS with the LEARNING requirements of the online teaching staff. If they don't map — don't select it! Make sure that any selection process has input from the teaching staff who will use the LMS. Look at the forward planning process that the vendors and developers go through. Look for input from people with educational expertise, and for planned upgrades that include new e-Learning tools and techniques. — 262

II. Comprehensive tips for LMS selection *continued*

FOCUS: Product features and business needs

Evaluate the future growth of your organization before selection. Evaluate the platform for the LMS/LCMS. Make sure you are familiar with the platform and understand issues that may come up. Understand the limitations the LMS/LCMS has. There is no tool that can do it all. See if the ones you are evaluating suit your need. Check that it is standards-compliant, SCORM and AICC, as this makes it easier to assess whether material from a variety of vendors will work and minimizes the amount of setup required to run compliant material. — 94

LMS's are fantastic for data in. Vendors impress you with all the features that house the architecture; however, one of the biggest problems is data out, i.e. reporting. During the selection process, I would highly recommend that the organization have clear definitions of what they need to report on, and have the vendors verify that the required reporting exists. A clear understanding of how to get these reports is very important, too. Do you need specialized reporting skills to design the types of reports you need (or will you have to pay a third party to write them), or does the system allow for "on the fly" data selection that creates the report as you go? Another very big decision (relates to the MANAGEMENT section, too) is whether or not your organization wants to host the LMS or bring it inside. Understanding the resources required for internal support is critical. Is this a core competency within your organization? If a decision is made for hosting, request and contact other customers that host an LMS. Hosting has its own set of management issues, and customers need to be crystal clear on what is covered and/or provided through managed services. — 245

User needs analysis needs to be completed. Budget. Is the product going to scale to your future needs easily? How is the product supported? — 383

Question to ask: Are you going to pay for customizations, possibly taking you off the path to future upgrades, or are you going to take an "out of the box" approach to the system? Decide early on if you are going with a hosted solution vs. in-house hosting for your system. This will have a big impact on who can play the role of long-term, day-to-day system manager. If you go with a hosted solution, you won't necessarily need your IT Department to play as big a role in the day-to-day system management. — 17

FOCUS: Stakeholder involvement and the selection process

Define the need and the success criteria of the tool and get the key stakeholder's written buy-in before you start looking or shopping. Criteria should include functional and non-functional needs. — 122

Establish an engagement model which ensures that all stakeholders understand what's desirable and achievable and which facilitates a "no surprises" situation at ITT time. Encourage the use of iterative prototyping in modeling requirements, scalability, extensibility, configurability, keywords. Clarify MOSCO list for needs. — 157

Establish your requirements early and ensure buy-in from relevant stakeholders. Do a buy or build analysis. Determine your criteria for who can create learning content; develop or adopt an instructional design methodology. Ensure that the system you select or build is compatible with the tools you want to work with and can support your IDM. — 159

Determine compliancy requirements and ensure that the LMS can support them. Ensure that upgrades of the LMS have not previously compromised stored data or broken courseware links.

ANONYMOUS

II. Comprehensive tips for LMS selection *continued*

Make a comprehensive wish-list of requirements before you go hunting for an LMS. Make sure everyone in your organization who will be using the LMS has a chance to demo it. Get references from other organizations using the product. — 249

Reference long-term organizational goals. Develop metrics for learning program success and LMS success before beginning the selection process. Understand the technology; be partners with your HRIS and IT departments. — 291

FOCUS: Business needs and vendor management

1. Have a clear understanding for what it is your clients, internal and external, want and need from such a system. Do their services and features match the needs of your objectives?
2. Ensure the quality of the technical services of the LMS company. Embarking on such a project without the help of quality, timely technical service is a nightmare. — 39

Successful selection criteria of an LMS and/or LCMS might include the following:
• Needs analysis and functional requirements must meet vendor's system features requirements (and/or be willing to customize a solution for you)
• Vendor's system must be scaleable in terms of feature set, architecture, and customization
• Vendor's system must be easy to use from a user and administration perspective
• Accessibility of vendor's overall support
• Vendor's history, vision, and current successes throughout the industry
• Overall price and support costs — 17

Determine compliancy requirements and ensure that the LMS can support them. Ensure that upgrades of the LMS have not previously compromised stored data or broken courseware links. — 17

Spend more time to collect and understand the requirements for the LMS/LCMS. Also, develop an objective and thorough functionality test for the finalists of your selection process. Ask to participate in their training before you purchase to evaluate its quality. Finally, require each vendor to build lesson test cases and export them to SCORM. Run these lessons in the SCORM RTEs. — 321

I would also stress the importance in selecting an LMS/LCMS vendor that will take on the role of partnering with you to get you through implementation and successful launch of the system. — 17

FOCUS: Stakeholder involvement and product features

1. Enterprise capabilities — can it be easily expanded and used by satellite locations?
2. Intuitive — can an instructor use it immediately or is training necessary?
3. Vendor support — what levels of support are included and what is the cost of those services?
4. Faculty buy-in — at a university, it is important to include faculty in the process. — 14

1. Understand what an LMS is and what it should do.
2. Have a basic understanding of how a database works and that the LMS is a type of database with specific data containers.
3. Understand how standards like AICC and SCORM assure consistency in the database and the data a course will track.

II. Comprehensive tips for LMS selection *continued*

4. Talk to your ISDs, programmers, and authors. Ask for input before you purchase an LCMS. We purchased one and never used it because everyone had their own development tools which they preferred over learning another tool with less flexibility.
5. Talk to your HR Information System DBA so you will not be blindsided by issues with the HRIS not working with the LMS. They must share information, preferably in real time. — 50

Be sure to use a team approach made up of instructional design folks and the end users. Evaluate a number of products and compare and contrast each LMS based on a pre-defined list of core criteria. Above all ask questions about what the product will do out of the box, and if the demo looks too good to be true ask if that is the out-of-the-box model without add-ons and other cost-added features. — 86

Have a sound set of business requirements that include input from all stakeholders. Do not try to replicate a system of manual tracking and recordkeeping. — 190

Make a list of all features that are critical as well as those that would be nice to have. Make sure that high-level management understands why there is such a difference in pricing, and that you will get what you pay for. — 250

Match the needs of the organization with the LMS. Don't merely purchase an LMS because it has highest market share. Carefully consider features that you need (in conjunction with the campus) and don't purchase a system that is overpowered for what is needed. Explore options. Seek recommendations from a wide variety of stakeholders. Network with persons using various systems and see it in action — not merely the LMS/LCMS provider. Look for intuitiveness. — 263

FOCUS: Product features and vendor management

Pay careful attention to fee structures. Get a good handle on ongoing maintenance fee structures. Make sure the system is extensible. Make sure that it is really "SCORM compliant." — 8

1. Review the history of the external vendor you are considering. Are they a stable company? Who are their current clients? How successful have their clients been with implementation? How compatible are they with other vendors you plan to utilize in conjunction?
2. Does the LMS plug and play nicely with compliant online learning courses?
3. Whose servers will the LMS rest on — yours or theirs? Is this something to consider?
4. What type of service does this company offer?
5. Write out what features and benefits drive your search for an LMS, number them in order of importance and which you will plan on implementing for immediate use. Are there any you cannot live without?
6. What is their overall reputation?
7. Does the LMS they offer fit your list of required features and benefits?
8. Is it user friendly?
9. What type of training is offered to your Administrators and IT support group? — 52

Be certain the LMS/LCMS you select can grow to meet your needs. It is also important to go with a reputable company that is likely to be around when you are ready to upgrade. — 80

Evaluate the service record of the vendor. Evaluate integration with existing IT infrastructure, especially directory services. — 160

II. Comprehensive tips for LMS selection *continued*

Look for a company that has someone on the executive team who understands learning.   Look for a track record of the stability of the provider. Think of it from engineering terms: not just performance, but maintainability and reliability. Identify your needs. Identify ALL costs: implementation, ongoing support, content development. Set business, learning, and technology metrics. Consider open source. — 248

FOCUS: Stakeholder involvement and business needs

Gather requirements from ALL affected — HRIS, users/learners, approvers/managers, HR and look at multiple sources (industry publications, vendors, product sheets). Know what you NEED, what you want, and what you don't need or want. — 182

FOCUS: The selection process and vendor management

1. When you begin, know what your technology and organizational constraints are — this will define the pool of what is possible from the beginning.
2. Ask your faculty and your students what they value, include them in the selection process from early on, and be sure to be transparent about the constraints of any pre-defined selection criteria.
3. Project your program's growth to be aware of needs: Database, administration, support for faculty and students, technology, presentation and delivery.
4. Pilot! Pilot! Pilot in your own environment!! During that pilot, invite an open review of each tool to get community feedback. Weigh the pros and cons of the tool in use, from multiple perspectives.
5. Don't discount open-source tools in your hunt, for fear of a lack of support. Contract services exist, and may be appropriate for your implementation. If you are currently operating in an LMS/LCMS environment, track use of your current support and/or administrative resources to understand what would be needed in a contract support situation.
6. Diligently peruse communities of practice online to find out what others are doing — openly share your successes and found pitfalls as well. Try to find peers to communicate with who are implementing systems in teaching and learning environments like your own. — 27

1. Clear and complete documentation of business requirements.
2. Vendor dog and pony shows should be based on specific use cases with your data and actual data — if vendors cannot demonstrate, or will not demonstrate, your scenarios as part of the selection process then eliminate them.
3. Clear internal expectations as to what the system can and cannot do (under-promise, over-deliver).
4. Cross-functional team involvement in the selection process.
5. Check references and call at least three to five current or recent customers who have selected and implemented the same version you are considering. — 28

1. Understand the differences between managing an outsourced LMS process and having an in-house LMS and the benefits of each approach.
2. For both, especially an LCMS, it's absolutely necessary to define your processes and your future vision for distributing learning upfront to make sure that you can make decisions about products that will support your needs.
3. You must understand what can be customized and what the limitations and costs of customization will be. It's important NOT to talk in generalities here. Be specific about what you definitely want to do and what you might want to do. EVERY vendor tells you, "No problem, that can be done," but that is not always the case. — 51

II. Comprehensive tips for LMS selection *continued*

A peer organization, such as ILTA, is my best resource for information from other law firms who have implemented, or are contemplating the purchase of LMS/LCMS. I also look forward to the day when the LMS/LCMS technology isn't so cost-prohibitive. That, I believe, is the major reason my organization has taken it off its radar. — 58

Create a functional requirements document. Try out free samples. Have several vendors come to demonstrate and have them show you how to do what you want to do. — 112

You need prior experience with vendor selection and large system purchase and implementation. Talk with other organizations and the people directly involved with an LMS implementation, and the roadblocks they encountered. You need a working "sandbox" implementation that you can use to evaluate the system's out-of-the-box capabilities (not to be confused with a demo or vendor presentation). Extensive Google mining for negative experiences with the top three LMSs you are considering. Always include IT staff in the project, from start to finish, and get their input every step of the way. Utilize someone who is experienced with vendor negotiations when it comes time to talk pricing. Investigate beyond vendor claims of SCORM or AICC compliance. To some vendors, this means being able to take a SCORM package and import it into THEIR proprietary authoring tool in order to work with the LMS. Get hands-on experience with the publishing of e-Learning content before you decide to purchase. If the system allows for customization, be sure you know what technologies the system is built upon, Find out if you have the staffing available to perform such customizations — if not, make sure your budget's large enough to accommodate vendor-supplied contractors and/or consultants to implement LMS customizations ($$$$$). Be aware that many vendors depend on selling customization "services" to cover any "discounts" given to you on licensing and such. Be aware that in many cases, "Can be added to system via customizations," and "Yes, our LMS can do that," are one and the same. Investigate market trends and the history of buyouts, mergers, and acquisitions when it comes to LMS vendors. Ideally you want to select a company who will develop and support their product for years to come. You don't want to be informed that, after a year and a half of setup, tweaking, and customizations, your vendor is being bought out by another LMS company, and their product will be "integrated" with the other vendor's technologies (i.e. made obsolete). — 284

Conduct research on possible vendors and their strengths and/or weaknesses. Use spreadsheets to compare core criteria. At least one person in the selection/decision committee should have a good understanding about LCMS functions; another one should be there for the technology end, e.g. transferring data etc. Consider RFP after pre-selection. Know exactly what you want to accomplish with an LMS (where does it tie in with the business goals, etc.). Use independent research results (e.g. Brandon Hall). Try to look beyond (sometimes annoying) sales personnel and focus on the product and support structure for later. — 294

FOCUS: Business objectives and user requirements

The LMS should support the business strategy and longer range plans for human resource development. The LMS should be appropriate for the target audience and their level of computer skills. The more straightforward the better ... keep it simple, stupid. — 348

Understand what the businesses are first (using program managers, SMEs, learning designers and developers, and end-users). Make sure that you not only bring in users upfront, but make sure they understand what you are planning to implement. This is especially important if you are adopting either a LMS or LCMS for the first time. The first thing you have to do is clearly define the system and its basic functions and limits. You should also provide demos and/or access to documentation before asking a user group to make decisions. — 373

The LMS should support the business strategy and longer range plans for human resource development. The LMS should be appropriate for the target audience and their level of computer skills. The more straightforward the better ... keep it simple, stupid.

MARK UHLENBERG,
TRAINING SPECIALIST,
MONSANTO COMPANY

II. Comprehensive tips for LMS selection *continued*

Understand organizational and production requirements (not only pedagogical). Have a good overview of the market. Talk with the technical staff. Talk with other users. Try it out personally and completely. — 377

You will need to identify the business goals of your company and make the selection based on your findings. The LMS should be intuitive for the students and logical in flow for the administrators. The vendor must be open to suggestions, make the requested changes in a timely manner, and partner with your company on the cost of such changes that are implemented to existing customers who receive the upgrade. The LMS should not be so complex that it makes managing learning more difficult than without the application. Don't buy something that has more bells and whistles than you will use, and make sure the cost is within your budget (don't over-buy) — 405

FOCUS: Stakeholder involvement and vendor management

Do tons of homework. Check prices EARLY in the process; many vendors are exorbitantly high in price. Get your IT department's involvement early on, especially with regard to PC availability, bandwidth requirements, and server requirements. Get your HR department's involvement early on, especially with regard to integration with the HR system (PeopleSoft, etc.). — 15

Look for companies that have a maturity model. Look for specific information about support plans — no more, "Thanks for the check, see ya," situations. Bring all your stakeholders in and show them specifically what they would have to do if "System X" got selected. Too many of these lazy "consumers" bail out as soon as the system is in, and expect the administrator to do all their uploads for them. — 101

Complete a business analysis with appropriate stakeholders. Request that vendors complete a request for information. — 103

Create a stakeholders committee which explains what an LMS is, then proceed with a high level needs analysis of these individuals. This analysis is used to create a requirements document. Send that document in advance to pre-selected vendors to set their expectations in advance. Try to get a prototype installed before purchasing anything. — 114

Include as many end-users as possible in the review and selection process. Push the limits of the product in the review process to see how the vendor responds to concerns and continuous improvement. — 17

FOCUS: Business needs and the selection process

1. Consider the learning first.
2. Do not buy one, but lease, then decide your commitment.
3. Consider the cost of support. — 29

1. Strategic plan for delivery of instruction for the organization.
2. Analysis of current and future requirement for online, correspondence (paper-based), and face-to-face instruction based on strategic plan and on survey of user requirements.
3. Survey of available products.
4. Comparison of products with requirements.
In my opinion, number 2 is the most important. Combine power and flexibility with ease of use.— 48

> *The learner user interface (UI) is extremely important. It needs to be accessible and intuitive.*
>
> Marla Landreth,
> Senior Learning
> Technologist, InfoGenesis

II. Comprehensive tips for LMS selection *continued*

FOCUS: Product features and the selection process

Test the application personally — internally; not through a third party. Make sure your organization's technology infrastructure will support current and future implementations.   Make sure your organization's LMS and LCMS will communicate with each other and support the same industry standard (i.e., SCORM XX). Understand the implications of static vs. dynamic delivery for an allocation's selection and your organizational needs. Thoroughly understand your organization's current and at least "five year out" needs for the application. Understand the vendor's definition of customization as opposed to configuration of the application. Understand the financial, functional, and schedule implications of upgrading versions of the application. — 334

The first step is to understand that there is a big difference between an LMS and LCMS. In combination, it is a very powerful tool. Secondly, knowing the different products would be a great heads-up for individuals looking to implement a system. There are so many vendors out there, making a selection with just a handful of knowledge is very difficult. There are a lot of "gotcha's" that need to be identified when implementing, i.e. legacy information, assessments, reports etc. Knowing these in advance can help in the development of your implementation plan. — 341

The learner user interface (UI) is extremely important. It needs to be accessible and intuitive. This is my single best piece of advice, make sure it has a good UI. Be clear on the administrative tasks and time required of LMS administrators to maintain the LMS before selection. If administrators are creating and maintaining ancillary documents such as LMS instruction guides, movies demonstrating how to use the LMS, and course catalogs to help learners select classes, it takes a great deal of time away from developing additional learner content and can significantly reduce ROI. Decision makers should consider contacting current users of the products they've short-listed. Selecting users independently, i.e., apart from those handpicked by the sales rep, can be a great way to learn about life with that LMS. Talk to organizations that are similar to yours in size and in the demands they put on their LMS to see what's working for them and what they wish was different. Talk to LMS organizations that have the headcount and geographic breadth your organization aims to have in three to five years. See what's working for them and what they wish was different. With so many players in the marketplace, it can be hard to get know what's on offer. It's even harder to know who's going to be in business three years from now. Take advantage of the resources available from organizations like the Guild to get the benefit of your peers' experience. Try and get it right the first time. For learners who've had a bad experience it is much more difficult and will take more time than getting it right the first time. Start small. Beware of the "floorwax AND a dessert topping" solution. If it does everything, it's probably not going to do everything well. Try before you buy, see what would be involved in configuring the new system to use an existing online class. Understand the administrative tasks, learner experience and reporting options before you buy. Know that it's going to look easy in the demo, but try it out for yourself. Look for ways to reduce administration time. Can learner accounts be managed with an import from an HR system? If yes, will it work with your HR system? Will HR permit an interface? Will you need a consultant to manage and build your middleware? How much does that cost? (This can be a lot of work, but it's better to invest the time and energy here than to deal with it later.) Unless you've got a proprietary system, expect suppliers to know their competition and to explain to you why their's is better. If they don't know their competition, you can't be confident they know their market. If you're looking at ASP solutions, try importing an existing piece of content to the LMS. How long does it take? How long does it take for this same content to load for a learner? Know about applets and their installation. Can users do it themselves? Will IT have to do it? Choose carefully. Do the research and testing before you buy. — 344

II. Comprehensive tips for LMS selection *continued*

FOCUS: User requirements and the selection process

Identify core needs: audience size, audience distribution, authoring needs, security needs, reporting needs, workflow (if applicable), integration with other systems, adherence to AICC/SCORM standards (what versions?), whether it matches or compliments customers needs. Identify future needs. Identify current production. Identify transition/translation of current media to LCMS. (I would go on for hours, but don't have time.) — 204

Most importantly understand the demographics of the end users! Focus on your core needs for the LMS, not all the bells and whistles. Fully understand upgrades, upgrade support, and related costs, especially if you have customized the base product. Insist on a live demonstration of the LMS loaded with your real-life examples and needs to determine what ID markers could inhibit efficient usage of system. — 269

Seek advice from a truly independent advisor — ask them to confirm up front that they have no ties with any possible providers. Check the selections of other companies in your industry and/or any company of a similar size/structure, e.g. an LMS may work fine for the main office but what about remote branches where bandwidth may be a problem? Try to arrange a site visit to companies using the solution(s) you're considering. Take your time selecting. Don't be tempted to automatically go for all the bells and whistles. Set out your precise needs and budget first, and stick to it. — 307

Identifying technical requirements in the design phase will save you hours of frustration down the road. Don't short-cut processes and settle for a sub-par system for the sake of time. In the long run, use the technology that you are buying. Keep in mind that vendors will tell you that their system is the best. Do your due diligence and talk to people that are using the product. There are many limitations with certain LMSs, especially with respect to their assessment and reporting capabilities. — 341

FOCUS: User requirements and business needs

1. Clear definition of the LMS needs of the institution. This must include a study of the nature and quantity of content in each category (text, animation, video, audio, etc).
2. Determine the community that is providing content (content developers, instructors, contractors, professional video/audio production people, etc.) and how much time/effort they are willing to devote to training.
3. Attempt to match the capabilities of the LMS/LCMS with the community.
4. Make a realistic estimate of usage over the initial stage of the LMS use. Trend analysis can help predict later use and potential upgrade/replacement. — 22

We are in the process of selecting a platform and it is a rather difficult process. The main issues are: sifting through the enormous amount of vendor information, choosing existing technology, matching what some people in the organization already know/use, waiting for upcoming technology, and/or developing some of our own. One could probably decide these issues after some research and a few demonstrations, however, when dealing with several departments, or insitutions as in our case, the main hold-up is political, getting agreement. — 387

Identify core needs: audience size, audience distribution, authoring needs, security needs, reporting needs, workflow (if applicable), integration with other systems, adherence to AICC/SCORM standards (what versions?), whether it matches or compliments customers needs.

Fred Banks,
CBT Software Engineer,
The Boeing Company

II. Comprehensive tips for LMS selection *continued*

FOCUS: Business objectives and the selection process

Have clear requirements on the business needs. Have a deep understanding of the existing business processes and those which cannot be changed (due to compliance or other organizational dependencies), those which can be changed, and those which SHOULD be changed to improve organizational efficiency. Have experienced individuals who have been there and done that. — 17

One has to have the vision of how an LMS fits into an organization's overall strategy. One should be involved with all business units to understand how an LMS would benefit each business unit and the enterprise. One needs to understand that the road to an LMS implementation is a rocky one, so having a tough skin, per se, as well as being assertive, would be beneficial. Communication skills are vital so that one can communicate effectively with all business units and management to make them understand the NEED for the LMS. In addition, if one is to be the lead in the purchase, one needs to be well versed in the research arena, and needs to have a good relationship with IT. — 275

FOCUS: Miscellaneous combinations of concerns

1. Develop, understand, and gain acceptance of your high priority and critical business requirements.
2. Write the RFP with a requirement that finalists must provide a list of three customers who would be willing to host site visits WITHOUT the vendor present.
3. Use groups such as Brandon-Hall, Gartner, Bersin, etc. that have publications with reviews of multiple systems to help narrow down the field quickly.
4. Engage your Systems/IT area early in the selection process if at all possible. They know your infrastructure and will be able to provide input on applications that just aren't going to come into your environment for technological reasons. If they have a stake in the selection process, they will be much more flexible with getting the software implemented.
5. One of the major criteria in the final selection process (once you have two or three finalists that meet the bulk of requirements) should be, "Are we compatible with this vendor?" While you are separate organizations, LMS/LCMS implementations can be lengthy and, at times, painful. "Meshing" from the beginning can be critical to implementation success. — 23

1. Insure integration with the campus SIS application for frontloading course enrollments; uploading final grades, etc.
2. Insure maximum security for all users with detailed logs that provide in depth information relative to login times, movement in the application, etc.
3. Provide for a variety of interaction and testing tools to address learning styles, assessment methods, etc.
4. Provide 24/7 support along with orientation opportunities for both students, faculty, and support staff.
5. Provide enclosed email within course container for streamlining management of communication from students.
6. Involve faculty and staff (technical support, instructional designers, department directors, etc.) in the evaluation process when selecting an application. Provide access to the application for them to review. Provide a checklist of tools and ask for their opinion. Stakeholder buy-in is critical!
7. Talk with multiple institutions that are using the application being considered. Do not rely on the sales rep. Also talk with the technical support people.
8. Determine all costs (both current and ongoing); both apparent and hidden.
9. Determine if course and unit objectives can be measured through tools provided in the LMS. — 25

II. Comprehensive tips for LMS selection *continued*

1. Be sure to include your organization's IT/IS group at the outset. (Key decision point: internal or external hosting.)
2. Identify your organization's needs, differentiating "nice to haves" from "must haves."
3. Include future needs: one, five and ten(?) years out.
4. Research what's available.
5. Avoid asking for customized solutions. When in doubt, adjust your needs.
6. Make sure key personnel have good negotiating skills. — 26

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1. Know your requirements — thoroughly.
2. If the talent isn't available internally, hire a contactor to come up with 8-10 vendors that meet your needs.
3. Get buy-in from senior management and executives.
4. Be ready with metrics to prove the need and advantages. — 43

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1. Make sure that the LMS can associate competencies to roles, and roles to courses. You should be able to pull these roles from another system (e.g. HR database) automatically.
2. Ensure that the LMS can integrate with other systems you may currently have in place, or plan to implement. For example, will it integrate with your HR database, performance management system, email directory, collaboration tools, virtual classroom system, third party course content, etc. Ask for references of clients who have previously integrated the LMS with your other systems.
3. Focus on the process from the learners' perspective. Is the access process seamless, or will they have to log in multiple times? Will they be able to find and sign up for courses easily? How intuitive is the course search functionality? How personalized is the experience?
4. Identify a system that suits your organization and learning processes. Biggest is not always best. Determine which administrative processes your organization can be flexible on, and which you simply must have.
5. If you are in a compliance-driven environment, be sure that your LMS can provide the necessary level of reporting data and can automatically generate certificates for learners with the necessary information. — 45

Understand the details of your company's IT architecture so that the LMS will integrate well with that architecture. Clearly define the business processes that the LMS will integrate with so that the LMS value to the business is maximized. — 49

A learning management system should be affordable for the institution. You should consider the cost of hardware and staffing required to run the LMS. The vendor should be willing to provide 24/7 support. The system should be able to integrate with other current systems in use at the adopting institution. Ease of use by the end user should be a factor. (Does the LMS require plug-ins, unachievable hardware specifications for your customers, and constant updates from the user's side?) — 54

Assess and document all of the corporate training administrative tasks; purchase a product that can give end-users the results they are used to; purchase a product that streamlines an administrative process (simply); select a product that is user-friendly; select a vendor that has a proven change-management strategy for LMS/LCMS corporate implementation. Select LMS managers that have a combination of training development or administrator skills, and IT skills. Make one person or one department accountable for administering the LMS/LCMS. Help me develop training content, launch web-based programming, and think through blended learning strategies. — 72

Choose a solution that enables your company to communicate with constituents easily and on a timely basis. This means the tools available to deploy information are geared towards usage by the average computer user, and don't require technical intervention every time you want to publish something.

CAROLANN SHEPHERD,
PRESIDENT, CREATIVE
ANSWERS CORPORATION

II. Comprehensive tips for LMS selection *continued*

1. Avoid the tendency to over-engineer the RFP and the solution.
2. Identify the 10 to 15 capabilities your system must have.
3. Do not let the vendors dictate what goes into the RFP.
4. Be realistic about what you're doing with learning today.
5. A Swiss army knife is not necessarily what you need.
6. Consider waiting on the LCMS side of your selection until the market settles out a bit, or use Sharepoint for now. — 76

1. Be clear on how you will use your LMS.
2. Define your reporting requirements carefully — make sure the system can produce what you need.
3. Make your selection based on your needs over the next five years — make sure the supplier has an ongoing development program and an upgrade path.
4. Clearly define your current environment and your future upgrade plans — make sure the LMS will work in a nonstandard environment.
5. Don't be persuaded by the inclusion of an authoring/editing tool — most of them are quite limited in what they can do. — 81

Choose a solution that enables your company to communicate with constituents easily and on a timely basis. This means the tools available to deploy information are geared towards usage by the average computer user, and don't require technical intervention every time you want to publish something. Complicated processes to deploy information will mean your solution will not get used. Choose a solution that is feature-rich without being complex. Intuitive navigation will go a long way to making your LMS a place people return to often. Learning and collaboration won't happen if people don't use the tools. Find a solution that captures EVERYTHING. The key to good reporting is having the information you need on the report. Since you will not be able to define all the things you need to know going into the project, good data capture and flexible reporting is a must. If you are new to LMS solutions, consider a hosted solution that is pay-for-use priced. Without the worry of servers and security, you can concentrate on your content which you should make sure is portable to other solutions. — 95

1. Have a clearly defined requirements list prior to start without getting wrapped up in marketbabble.
2. Have a projected expansion goal beyond Initial Operating Capabilities and ensure the LMS/LCMS can support it. I.e., classroom scheduling, synchronous communication, etc.
3. Decide up front if you are looking for maximum re-use of content, maximum delivery flexibility (blended/hyrid vs. collaboration vs. "Course tosser") or integrated development/delivery solution. This will help seperate the "wheat from the chaff" pretty quickly. The folks that get into trouble are the ones that have nebuluous or ever-changing baseline requirements.
4. Look at your current and short-term forecasted business model and training delivery needs and stick to that.
5. Not "nice to have, or what could we do with it if we got it ..." — you can't hope to purchase for every contingency — and obviously your budget needs to be at least somewhat established beforehand. — 99

Conduct a detailed assessment internally to determine what your needs and wants are. Get senior management buy in. This may also include consulting with other departments that may be using or want to use an LMS also (depends on company size). Consult with your IT department. Determine your budget. Be very clear about your expectations (internal and to the vendor). Compare apples to apples. Examine scalability, pricing, and interoperability. A few RFP Items for the vendor: Implementation plans, IT setup, HR setup, resource management, competencies, authoring tools, registration capabilities, assessment and testing, reporting. Examine support by the vendor and their track record. — 104

David Blattenberger, Supervisor, Media and Technology Services, Tyco Safety Products Institute

II. Comprehensive tips for LMS selection *continued*

Conduct extensive needs analysis to establish the features needed for the business; include upcoming initiatives from establishing content, curriculums, delivery all the way to reporting. Look for ease of use for administrators to end-user. Look for multiple levels of administration. Is assessment tool included? What are the report capabilities and flexibility; the expandability to meet needs; the interoperability with other systems; the hosting capabilities of vendor? Hold discussions with references — look for both good and bad. — 105

Define the purpose of the LMS as it relates to business objectives. See it in action before you buy. Make sure it meets all of your needs, even future needs. Talk to existing customers of the vendor. Select a vendor with a good reputation for customer service. — 121

1. Distinguish needs from wants in defining requirements. Once you have determined your requirements stick to them and add only critical requirements if needed. Put non-critical items on a future release list. If you won't be using something the day the system goes live (or shortly thereafter) it can wait.
2. Keep vendors honest by evaluating their products against your needs — not defining your needs around what their products offer. Make them demonstrate how they would meet your requirements instead of simply asking them if they can. Often this will force them to admit they can't do certain things you need and the resulting cost will be more accurate.
3. Be open to change — once you have made a product selection you may find that there are other ways you can achieve the same functionality other than the way you initially envisioned it.
4. Get stakeholder involvement — make sure that people who will use the system, people who will provide and get information from the system, IT and security, and end users have some say in defining requirements, product selection and configuration. Stay the course. — 133

Do the upfront needs analysis so that you can be sure of the needs that the LMS must address. If you decide to buy an LMS/LCMS solution that is hosted internally, make sure you have the staff to support all of the functions — database skills, server management, report writing. Always involve IT in the selection process — plugins, players, performance, and security can all affect which system you choose, and IT can provide great advice. — 135

Don't let the sales process drive the selection process. Understand the requirements very very well. Pay close attention to what the software DOES NOT DO. Don't hesitate to pay a few bucks for one of Brandon Hall's reports. Get your IT folks involved in the selection process. — 141

Establish a selection team with a governance board. Perform a regulatory assessment of your proposed use of all training records, to identify or rule out industry-specific regulations. Perform a comprehensive needs analysis prior to purchase. Survey everyone in your target audience. Document your procedures, controls, and policies. Publish and promote them. — 156

Experience dealing with vendors. Understanding of relational databases and knowledge management. Understanding UIs. Business knowledge. Needs analysis. — 162

From my experience, the most critical tips would include:
1. End user usage habits, requirements, accessibility restrictions, user experience requirements.
2. Assessment of content development standards, functionality requirements (e-Learning and testing).
3. Tracking requirements of user audience (e-Learning modules, testing and retesting, certifications, support tools usage, etc.).

II. Comprehensive tips for LMS selection *continued*

4. IT Integration points with existing systems (intranet, databases, conditional access, e-Commerce requirements and support, etc.).
5. IT Infrastructure requirements (Bandwidth, servers, in house vs. hosted solutions, supporting software, licensing of third party apps).
6. License fees (per user, per instance, per use, etc.).
7. Desired outcome/support for certification and recertification program. — 178

Get top level support in the organization. Assign a GREAT project manager to it. Don't believe even one word of what the vendors say. Adopt the phrase, "Show me how that will work on my system." — 184

Identify your organization's business and training requirements (like the number of users, the geographical distribution of users, the types of learning media to be used, the kinds of collaboration required, etc) and match them with the features provided by the LMS/LCMS. Check out if the LMS/LCMS is SCORM-compliant; and also find out about the services provided by the vendor, like installation, initial training, after-sale support, etc. — 207

It's not about the bells and whistles. You must first identify your SPECIFIC needs — what do you want the system to do? Second, (if purchasing an external LMS/LCMS) identify vendors that meet those needs. Third, identify the LMS/LCMS that best fits with your current strategy and systems. One note — during this process, you will want to plan for future growth. Make sure whatever you develop/purchase is scalable. — 222

Know and understand the IT infrastructure of the organization. Ability to link the technology to the learning needs of the organization. Ability to think strategically. Understand true costs and pay back. Know what you need to know before researching possible systems. — 242

Make sure that people who design lessons to be used on an LMS, and also people who will use the lessons, are involved in the evaluation and testing of LMS/LCMS products before purchase. Have an enterprise-wide point of view when looking for features of an LMS/LCMS. Find what works best for the entire company and not just for your department. Don't allow your business's relationships with outside vendors to influence your choice of product. Make the choice based on research, not on working relationships. — 254

Make sure the software works the way your business model needs it to. Make sure the employee and training manager user interface is easy and intuitive. Make sure to select a vendor that uses a hardware and database system that your IT staff is comfortable supporting. Can multiple languages be offered for a single unifying course ID so that tracking and reporting can be by a single reference? This is highly important to companies that conduct regulatory compliance training and want to track compliance for a regulation with one report. Can your existing employee learning data be easily migrated into the new system? Find out the frequency and ease of updates to the application and its database. Insure that the LMS system easily integrates into your businesses current system of record (PeopleSoft, SAP, etc.). — 255

Make sure to prioritize your needs and requirements — you won't get it all. Check them up against what you actually do in practice. Make sure to sell the cost/benefit balance of the LMS to the management and other stakeholders. Make a checklist to compare vendors against — and make sure that a "Yes" means "We have it" and not "We can build it for a fee." Make sure, by asking other customers, that the implementation will not be complicated and costly. — 127

II. Comprehensive tips for LMS selection *continued*

Take your time. Know what you need. Consider ease of use for learners and managers — not just instructors or developers. Involve your IT group early on requirements for integration with other systems, bandwidth issues, etc. — 330

The group has to be organized right from the beginning. Someone needs to understand the bigger picture and have the selected team work towards those goals. Do your research. Don't buy a product that has more than what you need. Customization — think twice, as it will need to be maintained as the LMS changes and technology changes. Know your price range — including the extras. Investigate your business — what other information systems are currently being used, what history really does need to be brought forward (imported) — does it make sense to spend the $$ to bring it over? Train the end users well. Have a support mechanism in place before going live. — 342

The organization's approach to learning, pedagogy, and didactics must be clear and documented. This can "make or break" the next steps! The organization's existing IT-infrastructure must be thoroughly analyzed and documented. The organization's goals for measuring learning effectiveness must be clear and documented. — 352

Thoroughly define the needs of your company such as number and locations of learners, languages needed, ability to interface with existing software and IT products, the need to process financial transactions, specific functions regarding instructor-led class capabilities, ability to track and lend items, abilities regarding assessments and self-paced courses, etc. Prioritize those needs to create a vision of what the perfect LMS/LCMS would look like. Determine your budget! Develop (or search for and modify an existing) Request for Proposal. We used one that had a little over 100 quick response questions in addition to requirements for the potential LMS vendor to provide essay type summaries regarding their capabilities. We also purchased Brandon Hall's LMS report. It cost $800, but the cost in man-hours alone would have been much higher to do this research ourselves. We used this report to narrow our list of candidates. Then, we began phone interviews with each of the candidates from our final list. Finally, we narrowed our list to about half a dozen vendors. It was at this point that we made personal contact and asked them to demonstrate their products. We required references and interviewed those folks to help us to ascertain the difference between what they told us and what the reality was. We got Dun and Bradstreet reports for the final candidates. Finally, and perhaps the most important part of this whole process, was not to rely on what they told us that they could do. They had to demonstrate that they could, indeed, do what they said. It was not enough to have them present a PowerPoint slide with a view of what could be done. It is critical to see the actual system perform. It is easy to dummy up a PowerPoint (which we found vendors doing) in order to make it look like they could meet our needs when in fact, they could not. Finally, it is also important to assess their implementation process. What is included in the cost and what is additional? Get a list of what would be considered to be part of the configuration versus what would be modification. Configuration is generally included in the cost of the LMS, while modification adds cost. Find out how they provide support post-implementation. — 361

Thoroughly document the training/HR business process before selecting the LMS. Involve your IT department as early as possible. Bribe them often. Include key stakeholder groups in the selection process. Require the vendor to set up a proof of concept to actually demonstrate the functionality you need. Understand the maintenance process and SLA agreement. — 362

Three words: research, research, research. Find out absolutely everything you can about the LMS/LCMS, including tech specs, recommended hardware, user licensing, functionality, test engines, evaluation services, networking capability (talking to other systems), etc. Then have the top three ven-

II. Comprehensive tips for LMS selection *continued*

dors come and demo. Ask if they can set up a test site so you can play with the technology for a trial period. Think big and into the future: How will this serve our needs three years from now with our continued growth? How will this serve our clients? Is it user friendly? And finally, can we afford it? What is the best bang for the buck? — 363

Be discerning — make sure the LMS/LCMS fits your organization's needs, not the other way around — do your due diligence. Make sure that you have buy-in and that the LMS is deployed within the business processes of each department and at each level — so that the wiifm is apparent to individual contributors, line managers and executives and that they use the LMS as part of their business processes not as an addendum. Also, make sure that the people who are implementing an LMS are not just technical people but have a solid foundation in human performance technology and instructional design, otherwise the LMS becomes a database rather than a strategic tool. We must figure out the "pain points" around worker performance to see how an LMS can meet those needs. — 364

Up-front definition of the goals the (your) organization wants to accomplish by implementing a LMS/LCMS. Ensure that these goals link to business needs that are accepted and recognized by senior executives and other leadership. It's even better if you can get this on your long-term organizational strategy. Who is/are going to be your authoring expert(s) or manage your experts on the LCMS side? Who is going to have access to publish the courses (i.e., defining an approval process)? Who is going to make decisions about your organization's taxonomy and metadata so that your courses are searchable? Who is going to define a long-term content strategy for getting your content in the system? How will that strategy evolve into policy (who in your organization can make that happen)? Are you going to go with a hosted solution vs. hosting in-house? I would also stress the importance in selecting an LMS/LCMS vendor that will take on the role of partnering with you to get you through implementation and successful launch of the system. Decide early on if you are going with a hosted solution vs. in-house hosting for your system. This will have a big impact on who can play the role of long-term, day-to-day system manager. If you go with a hosted solution, you won't necessarily need your IT Dept. to play as big a role in the day-to-day system management. Accept course credits to the hundredth decimal (e.g. 1.25 credit hours). Note: I am involved with a medical specialty society and our accrediting body (the ACCME) allows us to offer continuing medical education (CME) credit in increments of .25, so we will have to pay for a system customization to accomplish this. — 379

We are at the end of the LMS selection process. From what we have done so far, I have the following tips:
1. Define your needs before you even talk to a vendor. Salespeople are in the business of need creation. If you don't know your needs, you may wind up with a bigger price tag and a system that can do things you don't even really need it to do.
2. Involve as many stakeholders as possible early in the project.
3. Find a good fit. Don't necessarily go with the biggest company. Don't pick a system just because it has gotten a lot of awards or because it has an impressive client list. Find a company that fits with your needs and your organizational culture and structure. — 385

Clear goals; Detailed technical requirements; Comprehensive selection process; Active participation of key people across an enterprise; Strong involvement of procurement; Great IT support — 113

III. Tips for matching features to business needs

Look for these features:
- Easy to import material; it analyzes and easily recognizes different formats when importing material; if any problems importing material it gives you a clear message on reasons.
- It allows you to customize everything (including all symbols) with clear instructions on how to do the customizing.
- It provides you with templates to adapt the look of your LCMS (especially with templates of clean simple smart design). Good smart design is what I normally find missing in anything related to e-Learning, it's like buying a book whose cover has been drawn by the writer, each person does one thing best, there should be graphic designers involved.
- High degree of usability — really important — don't like to get lost among buttons and endless links.
- Gives you tools and instructions to make it accessible.
- It grows with your needs, you might need to implement a couple of courses immediately and a year later a hundred — it doesn't limit your possibilities.
- Very flexible. — 2

Ease of use and intuitive user interface. Robust functionality allowing the best of both synchronous and asynchronous delivery, i.e. instant messaging, chat space, dedicated team space, document storage with check-in and check-out version controls, discussion board, survey capability, ability to push screen shots of facilitator's screen to participants, streaming video with audio, ability to push testing and maintain scores, etc. Economical scalability, i.e., it works for five to five hundred people at a time. — 3

Look for an LMS that is: 1. Flexible 2. Not specific to any platform 3. User friendly 4. Easy to manage 5. Not specific to any particular disciplines — 5

Doing a thorough needs analysis (current vs. future) is the best first step, even before you start looking at the systems. List the functional features required and map each LMS/LCMS in consideration against them. A Yes/No would be a good start. — 11

To select a system, the organization should document its current-state processes for managing learning and/or learning content. This can serve as a basis to determine the needs of the organization. Then use the identified needs to set priorities for the feature set of the system that will meet those needs. Also, the organization should document the integration requirements regarding the systems already in place and how the LMS/LCMS will receive and send data with those existing systems. — 17

1. Understand your needs, including budget restraints and near future growth, so you can best match your needs to the products.
2. Look for MAX flexibility for your Sys Admin to configure, versus going back to the vendor to customize.
3. Try to get a feel for real cost of ownership rather than just initial buy-in costs. — 32

1. Compatibility with existing databases and systems.
2. Ability to add existing vendor e-Learning materials.
3. Flexibility of integration.
4. Ease of use.
5. Live Webcast/Webinar capabilities.
6. Ability to create ad hoc Manager Reports. — 34

> *Look at benefits and not features.*
>
> L. Ravi Krishnan,
> Design head, Trina

III. Tips for matching features to business needs *continued*

1. Complete a thorough internal needs assessment.
2. Create a thorough RFI/RFP based on your internal assessment.
3. Go beyond the hype — force vendors to give specifics about the limits of what their systems can and can't do.
4. Use a standardized matrix or list of key features or functions to fairly compare what each system can and can't do.
5. Score and rank proposals based on the standardized matrix.
6. Test, test, test — make sure it does everything you need it to before purchasing. Only test the top three based on RFP scores — don't waste time demoing a large number of systems that don't fit your budget and basic needs. — 35

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1. Consider the core needs of your organization against what an LMS provides in general — to determine whether an industrial-strength LMS is even the right thing to consider.
2. Evaluate the content that is to be delivered on the platform, how users will be interacting with it, and whether the courseware being delivered on the platform will have needs (such as internal data tracking — a need that is often defined at the organizational level) that can even be met by an LMS/LCMS platform. — 17

Look at benefits and not features. — 44

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1. Reporting functionality
2. Scoring functionality
3. Usability
4. Ability to customize the content
5. Blended learning — 46

Simplicity; Data capture; Platform independence; Price; Support; Brand name for internal selling. — 47

A LMS needs to pull together all the communication modes you need so that the responsibility is on the learner. Instructors should not have to find students, update emails constantly, or be responsible for students not being able to be in touch. — 55

A LMS should be modular and provide seamless integration to existing facilities in the organization. — 56

A useful LMS should be scalable, easy to use, and accessible. Vital features to look for in an LMS are:
1. Standalone learning modules
2. Instructor-led options
3. Self-directed learning options
4. Web portal with extra information and community options
5. Learning components are fully integrated, providing a mixture of teaching styles to accommodate for different learning styles
6. Easy to use, transparent navigation system
7. Assessment, formative, and summative
8. Feature-rich software simulations
9. Web-based practice games
10. Solid foundation of job-applicable content — 62

III. Tips for matching features to business needs *continued*

A LMS must be robust and customizable. — 69

Analyze the reporting creation abilities of the LMS to see if there is the ability to create reports outside the standard reports. Is additional reporting software required to create reports outside the standard reports? — 71

Be as clear as possible about your requirements up front. Think not just about how you want to use the system now, but how you want the system to help you grow in the future. — 78

Be aware of what your organization is going to use the LMS for, and make sure that you select a system that is configurable as you grow. — 79

Be prepared with a detailed list of specifications; get as specific as possible to ensure the system will meet your needs. Create a comparison document for easy reference of system comparison. — 83

Be sure you know your requirements, and that they are clear when you provide them to the vendors. — 85

Catalog items, courses, and sessions should be easy to build, intuitive, and not as cumbersome as PeopleSoft's. Reporting features should be easy to use for Leaders and LMS administrators. The Search feature should be robust for end users to find courses. The functionality to send Outlook calendar invitations after enrolling in a course has been a popular feature; however, the invitations are not updated when there's a change to a course. — 17

1. Capacity — adaptable to variety of learning modes.
2. Flexibility — can be configured for individual company or institutional requirements and ease of use by managers at the teaching coalface.
3. Intuitiveness — structure and building make sense. — 92

Choose an LMS based on:
1. Support for many learning approaches — behavioral, cognitive, constructivist.
2. Allows for third-party add-ins or building blocks.
3. Meets the needs of the learning developers.
4. Is capable of running on many systems.
5. Is a scaleable, rigorous application that is capable of integrating with other systems.
6. Has ability for customization, e.g. language.
7. Provides suitable administrative tools for course management and population.
8. Includes customizable roles.
9. Includes metrics that are useful for all stakeholders.
10. Is well supported. — 96

Clarify your needs and anticipate future needs before you select an LMS. — 97

Clearly complete needs assessment; get buy-in at all levels. — 98

Complete an organizational analysis to determine your specific requirements, and then submit a request for information from different vendors to determine if their product meets your needs. — 102

Define a clear set of functional specifications. Identify growth and scalability requirements. Identify technical, legal, and policy requirements.

Sheila Kieran-Greenbush, Manager, IT Training and Instructor Instructional Technology, Columbia University

III. Tips for matching features to business needs *continued*

Decide what it is that you want to do, and then choose a system that has those features. Don't get one that has a lot of stuff that you don't need or want. Find one that is customizable and affordable. — 117

Decide what you want such a system to do for you BEFORE you start looking for one. The best way to do this is to write a requirement specification for the behavior and value you wish to get from the LMS. — 118

Decision makers should have a complete understanding of the features offered by an LMS, and whether they are relevant to needs of the end user. Ability of LMS/LCMS to accommodate changes — flexibility and expense of customization needs. — 119

Define your business requirements and work closely with the vendor to ensure that the tools you are selecting meet the needs of your organization. — 123

Define a clear set of functional specifications. Identify growth and scalability requirements. Identify technical, legal, and policy requirements. — 124

Define the organizational Strategic Learning Direction (SLD) and then match realistic organizational needs with the LMS/LMCS. — 125

Determine your needs. What do you want to accomplish? What would you like to track or pull reports on? Make sure those needs are available in the LMS/LCMSs you're looking for. Ask about available training. Ask about customization opportunities — is there an extra cost? Ask about system requirements. What kind of hardware would you need to support your learner population today and five years from now? .... this could go on forever. — 131

EASE OF USE:
• Data entry and updating. Ease of scheduling. Ease of reporting. — 146
• Easy access to reports and exporting of the reports to varied formats. — 147
• An interface that can quickly become intuitive. — 148
• Ability to customize. — 149
• Standards compliancy, and features. — 150
• Features drawn from best practices. Combined with an authoring tool. — 151
• Well updated. — 152
• Comprehensive searches for content by topic and objectives. Storage of all different types of media including .doc, .swf, .html, .wmv, etc. — 153
• Easy implementation. There are many feature-rich LMSs out there. Only a few are simple enough to use. — 267

Aggressively explore open source applications which support pedagogical elements and have a strong community backing. A good example will be Moodle (http://moodle.org). — 163

III. Tips for matching features to business needs *continued*

FIRST:
• You must understand what your need is, how you envision it being used, and the people that will be expected to use it. Without this information it is difficult, to say the least, to find a product that will meet your needs for the future. — 168
• Determine what it is exactly that you are trying to accomplish in implementing an LMS. What data do you REALLY need to capture, and what will you use it for? — 169
• Understand the differences between an LMS and LCMS, or what your purpose is for selecting one or the other. Second, develop a list of requirements. Third, determine if you need an LMS that offers content, or if you plan to develop your own or buy off-the-shelf content. — 171

FLEXIBILITY IS IMPORTANT:
• Need a system that grows with you effectively — intuitive use and security. — 172
• Practicality in implementation — based on the user needs. — 173
• Have rigorous criteria, but allow flexibility to meet your end goals even if you sacrifice a few bells and whistles. — 300

Follows industry standards; import and export of standardized learning material (SCORM, etc.); collaborative learning facilities; easy to use; authoring facilities included (RLO design support). — 174

A successful LMS/LCMS should support the following:
1. Project management
2. Capability to allow development of sophisticated content e.g. eBook, eTV, eTest, synchronous/asynchronous instructing, visual classroom, etc.
3. Learning administration — 176

It should be friendly to user: easy access to the course with the minimum number of clicks. It should be intuitive. It should have a clear presentation with not many buttons and links that will confuse the basic user. Light, i.e. works with very minimum HW requirements. Strong reports mechanisms and flexible to develop new ones. — 177

Give strong emphasis to support, both technical and general. Look for systems that "talk" to each other, and to as many others as possible. Give preference to systems that are the least complicated, to minimize the learning curve for people who use them. Make sure that LMS/LCMS "talks" to whatever systems you currently have in place. SCORM compliant and an automated process for compliance with Section 8 provisions (access by people who have difficulty with vision, hearing, etc). — 185

Have a clear specification of what you want to use it for rather than simply using what it offers. — 189

I would consider ease of interface to be an important criterion for the selection of an LMS. — 203

Identify your five most important features. Identify your budget (then add 20%). Identify your technical resources and instructor capabilities. Find the one that fits the above basics the best. Talk to others who have that solution, and learn about support and implementation issues. — 206

It should be as intuitive as possible. It should allow for interface between the platform product and MS or other authoring programs. — 218

III. Tips for matching features to business needs *continued*

It should fullfill your needs — no more no less. Therefore, an analysis of your needs is the primary goal. Then comes which features are need-to-have, and which are nice-to-have. Finally, what are the price/costs of running it? — 219

Key functions need to be easy for the average person to access and book themselves into training. Needs flexible document storage function to meet the needs of unique business.   User interface for admin functions needs to be easy to navigate and set up training and document storage. Make training information flexible, easily accessible, and reasonably priced for getting started. — 225

KNOW:
• What features you want and what the capabilities of your technology are. Important features that people forget are reporting features and "performance management" type tools. It is not all about managing the courses. — 229
• What you want before you start looking. Vendors are very eager to tell you what you need, rather than what you want. — 230
• Your own needs first. — 236
• Your requirements. Spending more time developing requirements will result in a better selection. — 238
• All of the specific features that you want the LMS to have and why you want to have them. Then look for a LMS that meets as many of the requirements as possible. — 243
• What you want the system to do before beginning the selection process. It's easy to get swept up in all the features of the systems and lose sight of what you really want and need. — 336

Look at: cost effectiveness, ability to handle (communities of) users, content, and offerings independently, provide e-Commerce options, enable customization, and respect the interoperability standards. — 247

Modularity. Easy navigation. Easy configuration. Diversity of languages. Support. Price. — 265

Make sure you choose a system to meet your needs. If you buy something too low end, you may not be happy with the lack of functionality. Enhancements to the low-end system may be costly and you would have been better off going with a more robust system to begin with. Most important thing: Easy implementation. There are many feature-rich LMSs out there. Only a few are simple enough to use. — 267

My best tip, simply stated is, "start with the end in mind." Before selecting a specific LMS/LMCS for your organization, develop a list of capabilities that you want the system to provide. A listing of capabilities should, in detail, be a description of the desired functionalities, not a list of program-specific tools. Then use this list of desired capabilities to produce a "capability gap analysis," outlining to what extent each desired capability is met or not met, for each LMS/LCMS considered. — 271

Patience. Focus on what it cannot do for you, be clear about what you need and create a checklist of your needs. DO NOT COMPROMISE or you will only have to repeat the process again! Before committing, make sure that you are completely comfortable with what you are getting, this is a big investment and you want to be sure that you get it right the first time! — 281

III. Tips for matching features to business needs *continued*

1. Quick and easy cost justification.
2. Easily configurable to the company.
3. Seamless fit into the company's intranet and/or portal.
4. Easily configurable to the company's HRIS — even if it is one of the big guns like Oracle, PeopleSoft, SAP, etc.
5. LMS/LCMS vendor must prove value of its system for ease of implementation to counter the argument by the ERP vendors that theirs is already "integrated."
6. SCORM/AICC compliance (duh!) but also very generic and easily configurable SCORM/AICC compliance rather than their own version of it.
7. Ability to provide both ASP AND internally hosted service as the LMS/LCMS grows with the organization. — 286

Really do your research and be very thorough and detailed in your list of requirements for your RFP. — 288

My tip as an organization starts the process is that it needs to clearly state the requirements and objectives for the training. — 299

The system should be robust enough to quickly load rich-media elements such as video clips, Voice Over PowerPoint presentations, Captivate, and more. It should be easily customizable in both look and navigation. The vendor should have demonstrated willingness. — 301

Scalability. Ensure you start up with a solution that can grow with the increasing demands from the organization as you get used to e-Learning. On the other side don't start off with a big, expensive solution for small demands. Flexibility. Ensure that the authoring tool(s) used can meet the diversity of e-Learning necessary to meet the demands. — 304

Selection is always based on temporal need. That means that what are you going to want to store, report, and use from your LC/LMS today, is true 90 days and two years from now. That is key to your infrastructure, the ability to scale, and what phases you may need to plan for — which then define your budget scope. — 312

1. A project definition and plan! The selection committee should include e-Learning practitioners. You need an entrance and exit strategy. Define end user specifications.
2. Learner tools should include communication functions i.e., discussion forums, video, calendar, file exchange, Webcasting, digital library, work on- and offline, synchronize, m-Learning capabilities, communities, portfolios, coursework feedback, flexible user interface, emailing, whiteboard, auto homepage for each learner, online store.
3. ISD interface should offer course design templates, wysiwyg tools, interoperability with 3rd party-developed applications, compliant (Flash) and non-compliant (PPT), automated testing and scoring, auto copyright permission and tracking, multilingual, e-Publishing, instructor online Help, Help desk
4. Curriculum management offers multiple user learning paths and certifications; surveys, feedback. loops, tracking, learning objects, and AICC/SCORM compliance.
5. Reporting! — online tracking, standard reports, ad-hoc set of reports, user-level report access, import/export user data.
6. Administration includes authentication, single sign-on, self-registration, tickler emails, registration-payment integration, course authorization, realtime, eCommerce supports automated transactions, VeriSign secure, payment reporting (internal and external), multiple currencies.
7. Tech support client browser, multiplatform, scalable/extensible, robust database and server specs, ASP hosting option, 24/7 tech support, multilingual.
8. Costs: budget, base with options, customer satisfaction reports, package/port, training, versioning, future growth. — 313

The system should be robust enough to quickly load rich-media elements such as video clips, Voice Over PowerPoint presentations, Captivate, and more. It should be easily customizable in both look and navigation. The vendor should have demonstrated willingness.

Meg Yanalunas,
Instructional Designer,
Walsh College

III. Tips for matching features to business needs *continued*

Short learning curve for faculty and students. Transparency. Interface with other software systems (i.e. Dreamweaver or Frontpage — Web design). — 315

Similar to a project plan — best — sufficient — minimal needs. — 317

Start with customer requirements. Educate on LMS capabilities. Look forward on applications that will line up with the LMS. Develop use case studies. — 323

Successful LMS should have the following features: User friendly, easy navigation and reliable. Technical support when needed. Communication tools (synchronous and asynchronous). Links to external resources. Efficient testing and assessment tools. Translation capabilities. — 325

Survey (not just users), research, trials, and take your time. Much money has been wasted on implementing programs found to lack the desired outcomes. I have a degree in Educational Technology and an undergrad in Mathematics. My entire degree program was about these issues, programming, creating, implementing, surveying, researching, etc. I've actually programmed several myself and I definitely have preferences over others, and it's important that paper and pencil be used far before you call LMS options. What is your intent? What do you need to fulfill the intent or mission? Can one LMS work or do you need to integrate two to make a better long term product? Will you outgrow the capabilities if this thing explodes? Do you have the financial and manpower capabilities to maintain it? Is this for profit or not for profit? How much do you want programmers to program and curriculum writers to write? Are these two jobs one person? Does one compromise the other? Is the LMS going to create such a learning curve for most it's timely in launching a product? — 326

The best tips I can provide:
• Identify the needs of the organization (business requirements of LMS/LMCM system)
• Identify business requirements for the future (where should the LMS/LCMS be in five years)
• Identify existing system integrations (what are the existing systems that need to interact with the LMS/LCMS)
• Ability to customize (and mostly ease of customization and impacts of new versions on customization)
• Ability to grow with organization's needs
• Vendor support and costs for updates/changes
• Integration to vendor or internally developed e-Learning packages
• Web-based and self-explanatory
• Handling of compliance
• Ability to track and plan learning (needs to be able to assist in career planning and competency tracking)
• Ease of administration
• Reporting functions (created and ad hoc) — 337

The biggest piece of I advice I can offer is not to purchase all the bells and whistles if you don't need them. If you are simply going to be tracking users, you don't need a "full-blown" system. — 338

The leanest, meanest, cheapest, standards-based product that can deliver what you need. — 343

> *The leanest, meanest, cheapest, standards-based product that can deliver what you need.*
>
> Mohit Bhargava, President, LearningMate Solutions (Canada) Ltd.

III. Tips for matching features to business needs *continued*

The LMS (includes LCMS) which is user friendly: cost effective, easy to operate, with efficient search function, capable of operating on multi-platforms, built-in functions for navigation from course to course (subject to subject), operable even with almost nil computer literacy, very good "Help" functions. — 345

The LMS must be intuitive to the user, and hopefully intuitive to the administrators, managers, and course creators on the back side. When discussing the LMS during my Masters program, we learned the importance of a good user guide. My feeling on this is that the LMS should help the student/teacher team to achieve the learning objectives, and user guides don't really help us do that. Instead, I feel a user guide is a distraction away from the learning objective, usually to solve some problem with operating within the LMS. The best LMS is one that can be figured out without a user guide. — 346

The LMS must meet any two of the following three parameters: Fast (response time), Good (features), Cheap (cost of product and implementation). — 347

The most important step in selection of an LMS is defining EXACTLY what you expect to be able to do with the LMS. Every vendor has a different feature set, and you want to choose the one that will most closely match your needs and your budget. — 350

The perfect LCMS/LMS is the one that best supports the company's knowledge transfer processes. Generally speaking, solutions that can deploy high amounts of learning content in a short time would beat the others. The faster the better. — 353

Think about automation before integration. A lot of vendors currently promote their performance management integration, succession planning integration, overall HR integration. It is more important to build out a capability that supports the learning strategy, organization, and operations. Usually, if you want more integration, you get less flexibility, and this can be limiting. Once the learning management system is established, you can look for opportunities for integration to other systems based on business need. — 358

Try not to look at price and instead focus on what you want to be able to do with the data you enter and later collect. If your purpose is to run very specific training activity reports, you need a system with a dynamic reporting package. If you need a system to support custom e-Learning content, you need a LMS with a robust authoring tool and author support. If your business is fast-paced and quickly changing, you need to partner with an LMS vendor that recognizes and accommodates your pace. Look for a vendor that has enough flexibility in their LMS to accommodate specific needs for your organization. — 369

Understand and prioritize your organization's current and future learning needs. Know where your organization currently stands, and what future outcomes you desire. — 370

Use preliminary vendor demos to help your firm discover its LMS/LCMS needs. Only by having a detailed understanding of LMS/LCMS functionality can you discover what your firm really needs or can do with an LMS. — 381

We have an e-Learning RFP template that we distribute as part of our e-Learning strategy class. I plan to be selling that template shortly, as well as doing at least one free Webinar on the topic. The primary decision factor in determining what LMS you purchase should be what you need that LMS to do. The only way you know what you need it to do is if you do your needs analysis and determine what your e-Learning program should look like. The certification program should have a prerequisite of needs assessment skills, and possibly e-Learning solution design. — 389

III. Tips for matching features to business needs *continued*

Web-based; outsourced hosting; able to accept legacy content as well as supplier proprietary content; can accommodate range of media types including video, MS Office-generated content and Flash; flexible testing options; flexible support for different levels of e-Learning from informal short course through to CPD and diploma grade. — 390

Well-written RFP containing system requirements based on actual user needs. — 393

Write user scenarios before writing specs and selection. — 399

You need to have a complete understanding of your company's needs not only now but what they could be in the future. It is easy to select a LMS for your current work style, however, it is hard to make an existing system fit in the future. — 402

You need to know what you need now as well as anticipating for the future. Have a plan for your needs before you start looking. — 403

I believe that it should support a wide variety of platform learning — from self-paced, to CBT and WBT, to seminar and small group. — 316

Ease of reporting. — 303

IV. Tips for LMS review and evaluation procedures or process

Get core stakeholders (IT, Training, HR, etc.) involved early. Plan for what you want to accomplish (capacity, reporting, data hierarchy, etc.) now and in the future. The future is the key as changes to the organization may require different capabilities from an LMS/LCMS. Planning and forethought can save huge amounts of time, money, and hassle to keep up with change. Make sure vendors demo capabilities extensively. If they can't show you that it can be done, then don't count on it being done. — 4

1. Be very clear on what you really need. Very clear. So you don't get distracted by all the bells and whistles that you will probably never use. Categorize and prioritize features, e.g., essential, want to have, nice to have, don't need to pay for.
2. Talk to as many current LMS users as possible. Try to find organizations similar to yours in terms of size and e-Learning sophistication, and find out what they did, how long it took to implement, and how they feel about the system now. If you can, talk to users, not just the project sponsors who bought the thing.
3. Make sure you are very clear on what you really need.
4. Go to LOTS of conferences, and talk to all the vendors.
5. Be VERY clear on what you really NEED!!
Don't talk to any vendors who won't take the time to answer your questions or understand your needs. If they are this much trouble to deal with before they get your money … (Personal rant: I talked with one vendor who said, "Our pricing is all on our internet site." So I spent an hour figuring out their pricing structure and developing a cost based on my user population. I sent the guy an email asking, "Will this be my cost?" He replied, "You can't just use the prices off the internet because I can give you a package deal." Needless to say, I didn't pursue his product any further.) — 12

IV. Tips for LMS review and evaluation *continued*

Identify needs. Get budget range. Then choose. — 16

Create a good, sound project team, know your stakeholders, and properly identify your requirements ... then select your LMS. — 17

1. Have an integrated team on the selection committee including folks from IT.
2. Scripting out the demonstrations for vendors to avoid as much "sales talk" as possible.
3. Going through an RFI or RFP process to document requirements and clearly communicate core needs.
4. Request a demo site/sandbox to get a real feel for the tool.
5. If possible, attend user groups or virtual sessions to hear what their current customers are saying. — 19

1. No sales team demos — get a trial version installed and get key people to use it.
2. Install those recommended by similar institutions in your sector who also have similar support staff, user ICT skills or familiarity profile (or note differences and take into account during process) and get same people to use them.
3. Include students in trial, both bright and not-so-bright.
4. Remember that it'll be difficult to list criteria for what you want it to do because latest systems can probably do things that you wouldn't have thought of.
5. With #4 in mind ensure comparison of near-identical tasks and these must include the guy who's not interested in trying to upload a folder (not just files) with things like old Word docs containing links.
6. Get firm five-year costs and extent of commitment to upgrade an expansion if relevant.
7. Find out what government or government department plans are for provision in your sector — in the UK these are significant!!!
8. Be prepared to say NO to all of them.
9. Can someone you employ change the home page to look as good as your institutional site? — 20

1. Do some research to identify the common core and optional features that are available and to get a good sense of where the industry is going.
2. Establish user requirements.
3. Identify candidate solutions based on user requirements. Consider using industry analysts or knowledge databases to narrow the search and round out potential solutions that may have been overlooked.
4. Create an RFP that is well-aligned to requirements and evaluation criteria. Establish the evaluation criteria prior to reviewing the responses. The criteria can always be adjusted, but it is worthwhile gaining general consensus before looking at the candidate solutions.
5. Review responses, rate them, and invite finalists in for demos. — 24

1. Identify reporting needs up front.
2. Identify quantitative data needs to be tracked.
3. Identify what data should be available to learners.
4. Identify level of interaction desired. — 40

1. Identify the needs of the organization. Why is the company implementing a LMS? What will the ideal result look like? What features are required, what features are desired? Who are the organization stakeholders (and who internally might work against the implementation of an LMS)? Who is the Executive champion for this project (you will need top-down support for the project)? Will training be completed online? If online training is to be used, where will it come from and how will

IV. Tips for LMS review and evaluation *continued*

it be created? Will students be asked to register for classes online? Are there industry regulations (21 CFR part 11) to consider? Do government regulations (Section 508) apply? Are integrations with other systems required (documentation system, HRIS)? Where will students be accessing content from (intranet, home, remote PC, remote handheld, etc.)? Who are the students (employees, customers, both)?

2. A LMS that will be delivered to customers will likely require the capability to customize the interface to reflect the organization's color scheme, logo, etc. Will the product be hosted internally or by the vendor (or is either acceptable)? Identify budget for the product (with multiple environments?), the implementation, annual service fees, and periodic upgrades. Create a requirements document that will focus evaluation on the organization's needs and preferences.

3. Locate and contact vendors. Eliminate products that do not comply with standards and requirements — even if they are willing to customize a product. Eliminate products that are grossly out of the price range. Remember, that many vendors can reduce the price.

4. Compare features of remaining products against the requirements document.

5. Ask for demonstrations of the top three to five products. Invite all stakeholders and those who were identified as potential opponents (always involve the opponents). What skills are required to customize the product? What skills are required to link to content? How are administrators given access?

6. Contact existing customers. Are they happy with the product? What percentage of product features are they using (very important question!)? What were the implementation experiences? How well is the product supported? What do they like the best, the least, about the product? How long did it take to implement the product?

7. By this point, there should be a clear preference for one or two products. If undecided between multiple products, ask for in-house training on the product. During training, ask the vendor to show examples of how the product would fit into your business practices. — 41

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1. Know WHY you need an LMS or especially an LCMS.
2. Set a realistic budget and stick to it.
3. Empower a committee for the analysis of and recommendation for the LMS/LCMS, but keep the number of participants down to a dull roar and vet them like you would a presidential candidate. They need to have a thorough understanding of what the LMS/LCMS is, what it does, what it does not do or does not do well, how it fits into the overall strategy of the training group or company, etc. These people should probably be the ones who will ultimately manage the LMS/LCMS and should have a vested interest in the one chosen.
4. The selection committee should adopt a democratic stance in choosing or recommending the LMS/LCMS. Unanimity is not necessary, and may not be possible. Too many times poor or hasty decisions are made in the name of consensus. The company's culture may dictate this point, however. — 42

A mixed team consisting of people with technical knowledge, distance learning expertise, classroom delivery expertise, and financial considerations. Each team member should have equal pull or weight on the team. Too often one group "leads." — 57

At ThinkWorks, we use a seven-step process to assist our clients in the selection of an LMS/LCMS:

1. Establish the Learning Strategy — Define the strategic and operational processes for managing learning in the organization.
2. Document the Requirements — A key factor in finding the right LMS for an organization is matching the LMS to the organization's requirements.
3. Research the Solutions — Focus the research on core and highest-priority requirements to develop

IV. Tips for LMS review and evaluation *continued*

a short list of possible solutions.

4. Prepare a Request for Proposal — Draft the RFP using the same requirements used in the research. Don't use a pre-built RFP; they are built to someone else's requirements.
5. Review the Proposals — Use the responses to create a short list of three solutions, ask for access to demo sites to freely explore the software, and ask for (and follow-up on) references.
6. Schedule Demonstrations — Create vendor demonstration scripts based on your organizational needs and ask each vendor to follow the script.
7. Make the Final Selection — Determine and utilize a process for evaluating and rating the vendors and solutions. Be sure to look long-term, and include ongoing support and maintenance in your decision-making criteria. — 75

Questions: Cost, Available Support, Compatible software, Learning curve for designers, Security, Stability — 108

Cost; Compliance; Adaptability — 109

Cost vs. amount of activity (# of courses and # of learners); range of functionality; ability to integrate with network; support — 110

Do lots of research. Talk to people and companies that have purchased an LMS. Know exactly what your LMS requirements are. — 134

Document how many courses you have. Document how many users you have. Document in-house systems to which the LMS/LCMS has to integrate. Pick a well-respected system which is in the top 20 of market share for sales. Figure out how purchased content is going to be imported before you buy. Figure out how home-grown content is to be imported before you buy. Figure out how this system is going to be integrated with existing in-house systems. Choose a system that can structure and enforce pre-requisites. Choose a system that can include/track offline events as well as online events. — 137

Establish a detailed requirements document that specifies exactly what you want to be able to do with the LMS/LCMS. Distribute this to potential vendors with the RFP. Work closely with your IT support to review things like system requirements, technical platforms, server architecture, and network communication requirements to ensure that what you buy will actually work in your infrastructure. ALWAYS get a full-day hands-on demonstration of any potential candidates. If your drop-dead needs can't be adequately demonstrated, then you shouldn't buy. — 155

Establish the high level functional definition of the learning and collaboration functions, trainer features, learner tools, administrative features, technical specifications and compatibilities through a group process that involves a cross-section of managers with direct responsibility for the installation, implementation or maintenance of the LMS/LCMS. Use an in-depth, participatory process, such as Appreciative Inquiry, that calls for these stakeholders to explore and articulate their expectations for the system that they envision, and how they will support its achievement. Such a process should take no less than 24 hours of meetings. — 158

First, establish what you're trying to accomplish with the system (goals, objectives, and scope); research available products and vendors prior to contact; create an RFP based on your goals, objectives, requirements, scope, etc.; obtain minimum of three competitive bids; review/analyze with project stakeholders. — 166

IV. Tips for LMS review and evaluation *continued*

Best tip: Define the process ...
1. Gather and compile requirements and determine budget.
2. Investigate systems that seem to fit the above.
3. Invite the identified vendors to demonstrate their suitability.
4. Iterate until you find the one that works that you can afford. — 170

Gain a year of experience with a simple system before making major purchase decisions. Use outside resources such as Brandon Hall to help you. — 180

Gather needs from users. Select several vendors based on your company's needs. Have the vendors visit your company to give a demo of their system to primary users or a select group within HR or training. Narrow the field based on input from the user group. Request an RFP or RFQ from the vendors. Make a final selection based on the RFQ that best matches your company's needs and budget. — 181

Go through a thorough RFP process. Set your criteria ahead of time. Weight them. Get a committee of key stakeholders (administrators, course builders, IT support, etc.) to be involved in the evaluation and selection process. This is a project, manage it like one. Get all of your agreements and timelines in writing and hold the vendors to them before payment. Use your purchasing and legal teams in whatever required capacity they have set up to serve you. — 187

Hands-on trial of a short list. Use BH (Brandon Hall) LMS selection tool. — 188

I think the most important thing to do in the selection process is to have a broad search. Send out RFPs to multiple vendors and prepare to have a lengthy search process. Finding the right solution takes time but is worth the effort. — 202

1. INSTRUCTIONAL DESIGN — Get a clear picture of the range of instructional designs and strategies used in your institution. Then determine whether these can be efficiently expressed in or supported by the application.
2. DATA MODEL — Ensure the data model of the application can be mapped to the organization's domain. E.g., can the calendar/schedule represent semesters/terms/periods? Can an appropriate group structure be set up for students to reflect the institution's administrative and rostering practices? Can the navigation structure be set up to reflect the priorities of individual users (today's lectures, this week's assignments, current reading)?
3. INTEGRATION WITH ADMINISTRATIVE SYSTEMS — Can the application integrate with the institution's administrative systems for: Authentication, Authorization, Data validation, Generation of navigation structures?
4. RELIABILITY, RESPONSIVENESS AND SCALABILITY — Can the application scale appropriately for the size of the institution? Can the application be load balanced? Can the application be clustered? What are the mechanisms for coping with machine failure?
5. LINKAGE — Can the application link intelligently to external repositories and applications?
6. EASE OF USE — Get a working demo or prototype of the system used by instructors and students with mixed teaching and learning styles. Make sure this evaluation is task-based, working with routine processes and resources. — 212

Know your organization; target audience; business processes, list of questions for the vendors, and a list of must-haves and can-live-with criteria.— 234

IV. Tips for LMS review and evaluation *continued*

Know your own business needs and use those in your evaluation process. Assemble a selection team of experts in all critical domains (e.g. IT, HRIS, Operations). Draft a script for all vendors to use during initial presentation/demonstration. For your finalists, require a sandbox environment and a training session that covers the processes you anticipate performing on a daily basis. Spend at least one to two days working with the system. — 235

LMS knowledge and skills are beneficial for most training professionals, specially those managing enterprise learning and training-for-profit. They must prepare a cost-benefit business case, before proceeding with selection. If an organization needs to track certification, formal learning, and managing large number of resources they should implement an LMS. They must clearly define their needs and processes before starting the selection. They must do an RFI and then an RFP. They must know the IT infrastructure and security requirements. I feel the LCMS is still not a mature product/market. Most organizations can benefit from learning and communication portals for formal and informal learning. Knowledge repositories and communication channels (blogs, discussion boards etc) and access to experts (eMentors) is more important than LCMSs. Organizations embarking upon development of training guides as well as documentation for products should look at CMS rather than an LCMS. I have developed and managed all facets of training (traditional and e-Learning), implemented several LMSs and architected LMS products at a major software provider, and now manage training for profit at a large software provider. — 244

Read, read, and then read some more to grasp the complexity of what an LMS can provide. Then identify a small group that represents the departments impacted by the LMS (database management, network, users, management) to do a Rapid Requirements Discovery to drill down to what's needed versus what's a nice-to-have. Based on needs and cost requirements, decide between custom design versus off-the-shelf before creating RFPs. — 287

I recently assisted in coordination of and participated in the evaluation of the LMS/LCMS for the Department of Homeland Security. The process is certainly one that could use some standardization and agencies/companies considering either of these solutions could certainly use guidance/help in easing the burden. A competency list or certification program would also go a long way towards educating interested parties on the division of, or shared nature of, responsibility between HRD elements and IT elements of the organization. Best tips towards selection:
1. Identify all functional requirements of current training system.
2. Ensure participation by all possible elements of your organization from podium instructors to quota managers.
3. Identify all data fields to possibly be used or needed in capturing necessary information. Integration with current HR Information Systems will be critical. — 289

Scope the entire process. Make sure you are comparing apples to apples. — 305

Selecting an LMS or LCMS solution is a team process. The team chosen will determine your success in selecting, implementing and managing the LMS/LCMS. A project manager should lead the selection process. Ideally, this project manager should have previous experience with vendor selection. The PM should have experience collecting stakeholder input and documenting requirements. In my view, I don't need this person to have specific experience selecting LMS and/or LCMS vendors. I just need them to be competent at vendor selection and management. In fact, I'd prefer this person to have diverse experience selecting and managing a variety of solutions as s/he may be able to recommend solutions other than the standard off-the-shelf LMS and/or LCMS. Sometimes budgets and timelines dictate some creative thinking, so I'd prefer broad competency in vendor and solution selection as opposed to narrow competency at LMS/LCMS selection. I'd also suggest having one per-

IV. Tips for LMS review and evaluation *continued*

son on the team who can create a buy vs. build analysis during the definition phase of the project. Additionally, the person who will be responsible for actually managing (owning) the LMS and/or LCMS once it's implemented should be involved in the process from the very beginning. — 309

The system must work the way your company works. That is, if you have special conditions at your site, the system should be flexible enough to accommodate them. Good navigational functionality is essential. Pay extra for these features if necessary — you will save untold hours of salary cost later. Let me move back and forth to perform my job without being forced to go back to square one for each task. Application programmers should be as capable as business software programmers. I am so tired of the lame software educators get, while the simplest business process software is efficient, optimized for ease of use, and adaptable. Buy a product written by true software engineers, not educators who have evolved into programmers. Pay for customization in the beginning, if you need it. Don't wait for the software to add the features you want. (Could take ten years!) If the potential users, managers etc. have bad experiences in the beginning, you'll never win them back, no matter how good the software gets. Insist that all stakeholders use a potential product for at least thirty days for normal everyday tasks, to ensure that no surprises crop up later on. Insist that they test all processes. Letting two people sit down with a sales rep at their site for an hour or two won't cut it. You need representatives for all potential users to test the product, including a layperson who is totally lacking in training knowledge. The product is worthless if everyone loves it except the potential student, who will refuse to use it. Ask to see help logs, etc. You want support to respond effectively and politely and in a reasonable length of time. Ensure that your current courses transport to the new LMS correctly. Ensure that GOOD training and manuals are available from the company. — 328

The team uses a systematic process of inquiry. (A logical set of activities that results in empirical evidence to judge the value of the program.) Team has appropriate measurement techniques, conducts feasibility assessments as well as cost-effectiveness AND cost-benefit analyses. — 357

Try before you buy. Put some effort in. Almost all companies offer trials so when you have it down to a short list try them all with some sample content in as close as possible to end user's conditions. Don't only use your computer — try those of your co-workers. If possible, get some of your end users to try out the different options. — 368

Try before you buy. Develop your processes on paper and test them before using software. Changing your process to match a specific vendor's way of doing things is a recipe for disaster composed of two parts reluctance and one-half part sabotage. — 17

We ended up with BlackBoard as the result of a PT3 grant. By committee the Technology group (faculty, techies) chose the program based on compatibility with existing infrastructure, the services and support offered by BB, the ease of learning the system, and the fact that BB is the most widely used system. — 388

Well, for a start, you should begin with Open Source solutions and see what the capabilities are, without being pressured by salespeople. Then, if your organization works better through vendors than with home-grown solutions, you can properly evaluate different competing solutions against the benchmarks you developed from the Open Source solutions you looked at. Or you will have elected to implement the Open Source solution. — 392

V. Tips for matching LMSs to users

Be sure all of the technology needs of the instructors are met by the LMS/LCMS. For instance, if instructors require students to post web pages, does the LMS support that? Does the LMS support SCORM-compliant learning objects? Is the LMS "third party" friendly for applications such as Respondus? — 84

What is the context within which it is used, i.e. the learners' level and orientation? I tend to believe that an LCMS/LMS used in, say, Uganda, may need to take into consideration the needs of learners in Uganda, rather than that customized for, say, the UK, where computing and telecommunications facilities are more readily available to the learners. — 107

Does it fit the need of the individual or specific organization that will be using it? If not, is it easily enough adaptable such that it can fit without having to re-invent the wheel? — 139

Faculty training on instructional design and the selected LMS/LCMS. — 164

1. Simple and easy to use and end-user friendly (Can achieve it using Standard Navigation throughout the front end).
2. Should be highly Scalable/Customizable to cater the different needs of an organization.
3. Should be easy to implement at user, manager, first level administrator, and top level administrator.
4. As first level administrators are the people who spends lot of time on it in adding courses, creating classes, adding resources etc., it should be designed in such a way that all these processes are made very simple and time saving (E.g., it should have multiple sessions capabilities, should have ability to add learners on the fly, etc.). — 175

Identify the various groups of users. Identify their immediate needs and potential future needs. Have a representative user group be involved in the review and selection of the LMS. Include the IT department from the beginning. Research the company. — 205

Ignore functionality — the most important thing to look for is ease of use. The experience for end-users and administrators must be intuitive. I've seen too many systems that have too much functionality that is too complex to navigate to be effective. — 208

It has to be student-centered. — 215

It's not the database or back office application, it's all about the end-user interface. — 223

Know who the users will be. Know how the LMS will be used. — 231

Know your audience/clients. A needs assessment is definitely required. — 232

Know the types and skills of people who will be accessing the LMS. — 240

One that is user-friendly and encompasses everything: transcripts, registration, billing, evaluation data, and testing. — 276

Ownership must lie with the users, Flexible use is key. Simplicity is essential, as is expandability and interoperability. — 280

V. Tips for matching LMSs to users *continued*

Strongly consider the ability to interface with your current HR systems. Ease of use for learners is critical to the success of the program. — 324

Understand how your instructors will be using the LMS. Selecting one that has all types of whiz bangs, but knowing your instructors won't customize the course, is a waste. — 372

User friendly. — 382

You need to select a LMS that is going to be flexible enough to meet the needs of at least 90% of the faculty/staff who are going to be using the system. It should also be fairly easy to understand and use so that minimal training is needed to get a user up and running. This is especially true of a University or college — it's not difficult to round up faculty to get them into training, really, but it is darn near impossible to round up every student to train them on how to access their course materials. A good LMS will not require huge amounts of frustration on the part of the student in how to access their materials, communicate with their instructors and classmates, take assessments, and submit assignments. Technical requirements should be low and non-invasive to users' home systems as well, so that there are no additional components you need to install and things like that in order to access the system no matter where you are. — 404

Easy "Edit" functions with "Help" on grammar and spell-check. — 345

Look very closely at the adoption rate of the learners and the facilitators. For example, an open-source application like Moodle (http://moodle.org) excels in this area. — 163

VI. Tips for matching LMS features to business objectives and requirements

Define crystal clear business objectives that are impacted by the implementation and set impact goals (if possible), and only then ask vendors to make a proposal, against these metrics. They should show you how they will help your organization achieve. — 9

1. Develop a project charter, project plan.
2. Determine business requirements, short-term and long-term.
3. Research best practices.
4. Involve stakeholders with assessment.
5. Justify decision. — 30

A total and complete understanding of your prioritized business requirements and learning processes. — 61

Align functionality of the technology to your business needs — have a good business case. — 66

Allow your needs, and not the vendor's, to drive your purchase requirements. Align your LMS/LCMS selection with your company's business goals. Complete a needs analysis prior to contacting vendors. — 67

VI. Tips for matching LMS features *continued*

You should choose a LCMS according to the core values of the organization administering the e-Learning program. — 68

Assess business needs early on. Have a long-term vision of the company's strategy   Flexibility in configuration. Customer service performance (check with other customers).   Service level agreements. QA and testing competency. SCORM compatibility. — 73

Begin with the end in mind. — 89

Define in great detail your business requirements and practices. — 120

It depends on the business requirements. — 126

Have clear and concise business requirements. Understand your organization's objectives for the system. Do your homework. Everyone will promise you that their system "can do it all," you have to figure out what "it all" means to you. Realize your own restrictions (cost, resources). Understand the difference between customization and configuration. — 191

KNOW:
• Core business requirements before any LMS selection. On another hand, LMS software is just a commodity, any one will do. — 220
• The needs of the organization and the different business functions that make that organization successful. — 227
• Your business needs. It comes down to two very simple things: 1) What needs to go into it? 2) What needs to come out of it? — 233
• Your true business requirements, and be aggressively effective in distinguishing between needs and wants. — 239

Make certain that the individual making the decisions understands the needs of the business moving forward, and the full implications of selecting an LMS (capabilities, open architecture, etc.). — 251

Make sure your selection meets the basic core needs of your organization before looking at other, less necessary, items. — 260

More than a successful LMS selection, it is very important to do the rightsizing of a learning solution, content management solution, skills and competency assessment, and the correct consulting services to implement it. The LMS is the natural result of answering questions regarding your company, and how knowledge impacts on the business results. — 266

Most important ... identify and clearly define the business need. Categorically rate the business needs. Get a list of vendors and have their sales force identify how they meet your business needs ... then have them present it to you. Review the product and make sure you can see a walk-through of each of the business needs that you have listed. Evaluate pricing based on how many needs they satisfy and how easily it's done. Very important ... contact current users and ask for negatives as well as positives. — 268

Requirements, requirements, requirements. Make sure you have a clear idea of your core business processes before entering a selection phase. Spend the time to create a detailed RFP or even consider a Statement of Objectives if you do not know all the answers to what you are looking for in a solution. — 292

VI. Tips for matching LMS features *continued*

Review the present and future needs and the budget. — 298

Test the ability of a delivered LMS/LCMS to support core business policies and practices, with as much functionality to support these practices coming "out of the box" or requiring as little customization as possible. In some instances, it may be better to revise your business practices than to reprogram the LMS. — 335

The most important first step is to really understand what you want to do with your LMS before you get too far in the selection process. People get stymied because they don't know their own business requirements. — 349

The selection of an LMS has to be based upon the business needs of an organization, as opposed to the added bells and whistles that are impressive yet seldom needed. One must focus on what the drivers are for the purchase and development of a LMS, and then ascertain from the varying options available which best suits the needs of an organization. — 356

Understand how learning administration and governance can be aligned with corporate goals. — 371

Understand your business needs and rules. Identify the technical requirements. Clearly communicate the above to vendors. Evaluate proposals against established criteria. Get buy-in for selection across organization. — 374

Understand client needs and long-term strategy. — 376

University mission regarding educating learners must address e-Learning; University must determine constituents for e-Learning; University must determine whether online or blended courses are more appropriate to meet goals. — 378

VII. Tips for obtaining stakeholder involvement and support

Before selecting an LCMS, ensure that IT infrastructure will cope with a new system. Watch out for upcoming IT infrastructure changes that would affect the selection process. — 87

Clearly understand and consider the limitations of your company's current IS infrastructure (both people and equipment). Selecting an LMS/LCMS based on what upgrades might be done in the future may not work out. Get buy-in from IS up front, not after the fact. — 100

Course designers, Curriculum Specialists, Trainers, and Directors need to take part. — 111

Does it align with each state's blueprint or standard curriculum? — 138

Ensure those on the selection committee are required to reduce the number of requirements to a reasonable amount that are prioritized. Picking the group to do this work in the first place is also important to ensure that everyone who needs to be involved, is involved. — 154

Before selecting an LCMS, ensure that IT infrastructure will cope with a new system. Watch out for upcoming IT infrastructure changes that would affect the selection process.

EUGENE O'LOUGHLIN,
LECTURER IN INFORMATICS,
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IRELAND

VII. Tips for obtaining stakeholder involvement *continued*

Full company leadership and all training teams must support. — 179

Include the faculty from the start of the process. — 211

Involve all stakeholders in gathering your organization's requirements for an LMS. Make sure ALL the issues are visible — make no assumptions. Consider labor relations issues as well — not everyone shares the same perspective of training, competency planning, and tracking. Before even considering to automate the process via an LMS, make sure you have a good understanding of the established manual process, including current roles and responsibilities in the process. — 214

Key stakeholder buy-in. All stakeholders need to understand the purpose of an LMS/LCMS, and to ensure that product choices (development or purchased products) need to fit into that standard. — 226

LMSs today involve more than just the management of learning. They also have the ability to manage activities related to competencies, performance, knowledge management, collaboration, and content management. It is important that key stakeholders representing these areas are involved in the selection process. Make sure you involve all interested parties from the beginning. Begin by making a list of must-have functionality and nice-to-have functionality. — 259

Outline all requirements for all stakeholders first. Consider future vision of learning in the organization and record those requirements as well. Ensure that the LMS selected is flexible and able to grow with your needs. If you have many content changes, be sure that you have an internal group that can make them expeditiously. — 279

Put together a selection committee with representatives from all the major learning groups who will be using the LMS. Having a 360 degree view of how the LMS will fit into and benefit your organization is critical. — 285

Should be available for the entire organization's use. The more input, the better the outcome. — 316

Surveying stakeholders for "must have" features and "nice to have" features and do a lot of research to find the one that fits the best with your requirements and budget. — 327

Work hand in glove with the IT department. Know your network on a technical level. If you choose something that conflicts with your current technology in any way, training will lose the fight to IT. — 395

Work with the training managers and developers of your organization to determine what training issues are required by the company, and determine if a LMS or LCMS is a viable solution to the problem. Just buying an LMS because it seems like a reasonable next step is not good planning! — 397

VIII. Tips for managing vendor involvement

Be sure that the LMS provider has a system of flexibility and support between upgrades. — 7

1. Use a scripted demo format for LMS software demonstrations.
2. Visit locations that have your candidate software installed. Talk to both technical and functional support for the system.
3. Get access to the vendor sandbox for the LMS. Execute a developed test plan in the sandbox environment. — 33

1. Conduct demos of both learner and administrative interfaces. Use a script that each vendor has to follow to make the evaluation a more even playing field.
2. Determine if the vendor can provide adequate reporting on all activity that occurs within the LMS.
3. Ask for a current bug list.
4. Ask for a future vision and plan from the vendor (where are they now, and where are they headed?). — 36

You want a company with a proven track record of delivery — a company that will listen to what you need in an LMS for your company, and is willing to co-operate. — 53

Actually KNOW and UNDERSTAND what your requirements are; write a demo script based upon those requirements and have vendors demo the demo script. Don't allow vendors to provide flash without substance during the demo. — 64

Assuming that you have buy-in from your company that an LMS/LCMS is required, my tips for selecting an LMS/LCMS vendor would be:
1. Put a Champion with lots of energy to lead the selection process.
2. Form a core cross-section project team. Get people with a stake in the project. Ensure IT and e-Learning folks are included.
3. Try to identify the basic needs for the LMS/LCMS.
4. Research who the major players in the industry are.
5. Ask those vendors that interest you for detailed information, pricing structure, and a list of at least 10 references with contact details.
6. Make sure you can contact the vendor's client list and you select which client to speak to.
7. Visit the vendor's customers if possible and get to know how they use it, what the issues are, and how it is benefiting the company. This will give you some visual ideas of how LMS/LCMSs are used.
8. Ask for a vendor presentation at your site.
9. Make sure you do not underestimate the cost side. Pricing and on-going support and maintenance costs are very important.
10. Do not always choose the largest player. Sometimes the smaller players may work closer with you to meet your needs.
11. Try to short-list only two vendors in the final selection with one as a fall back. This will make thing easier to compare in terms of your needs, and what the vendors are offering.
12. Ensure you have a team that will have the time to scope the work, be involved with the vendor at all stages, and during integration and acceptance of the project.
13. Try to have prototypes of the GUI designed and approve these.
14. Have GUI expert involved if possible. — 74

Best tip: Set your criteria and business requirements BEFORE selecting an LMS. Don't be tied down by what the vendor can provide — find the vendor that meets your needs. — 90

Can you work well with the vendor? — 91

VIII. Tips for managing vendor involvement *continued*

Consider your need for upgrading, up-scaling, and customizing the system. Will the vendor be able to meet your service needs in a timely fashion? Build it into the contract! — 106

Decide on what is most important in your selection of a vendor: functionality, price, time to launch, or accessibility, and narrow the field to those vendors who meet the top five. For your RFP, carefully document ideal scenarios and specifications for each user group (students, instructors, administrators, other systems people) that will be interacting with the LMS/LCMS. Try to envision all the functionality you want: course creation, purchasing, enrollment, administration tasks, student interactions (including communication and available reports). Ask each potential vendor to explain how their system would be able to meet (or not meet) the ideal you have mapped out. Talk with other companies who have used each vendor to determine how well the vendor project-manages the initial launch, updates, and enhancements from their end. — 116

Determine the advantages and disadvantages (or ROI) in having the LMS hosted by the vendor, or to hire someone to manage the LMS. If the LMS is hosted by the vendor, to what extent is support offered? 24/7 Help Desk? Backup systems? — 128

Determine what you want the system to do, then consider the alternative vendors. Consider the pros and cons of open source, like SAKAI or Moodle, vs. commercial services that are either user-hosted, like Blackboard-WebCT, or vendor hosted, like eCollege. — 129

Determine what you want your LMS to do before searching for or selecting an LMS. Many vendors don't understand why someone is asking for the LMS to do something until you explain it to them from the business perspective. This is inherent in the application developer world, since many times the company doesn't use their own product, and doesn't understand what a business might find important ... it's not just bells and whistles that drive the selection! — 130

Do your homework. There are hundreds of vendors with similar products out there. — 136

Does it meet our needs for SCORM or AICC compliancy at the right level (1.2, 2004, etc.). What is their track record? What support structures do they have in place? Who are some of their clients and can we speak with them? What are their plans for the future? What is their ability to play well with others? Don't get rigid structures that are hard to use. — 140

Don't listen to what a vendor tells you that it will do. Find out, from current users of the system, what it won't do. — 143

Don't rely on the minimum hardware and software suggested by the vendor. Product user documentation seems to be universally awful. — 144

Excellent tech support! Ability to customize if necessary. — 161

Give the tendering companies a selection of your learning material with very strict instructions on how they must make it work within their system. — 186

Have the LMS/LCMS vendor come in and install it on my existing IT equipment and then run their demos and sales pitches from that. No smoke and mirrors allowed. No telling me that it will, or should, run on my system. I want to see it working, on my equipment, and then we'll talk features and price. — 192

VIII. Tips for managing vendor involvement *continued*

In-person vendor demonstration to representatives from an entire company's training and HR teams. In my company, 20 different training groups handle 20 different Lines of Business. Members from each group should be there to see if the vendor demonstration meets their requirements (provided they can determine their own requirements). — 209

Know the vendor and the technology. Field test the LMS/LCMS. — 228

Knowing there are many claims made regarding compatibility and ease with which existing programs and functions can be utilized in a new system, I would appreciate talking with at least one client of each finalist that has worked with their system for at least one year. I'd want to know how easily or otherwise the whole transition process went, and how well the vendor worked through problems with people as well as data and functions. — 241

Make sure the vendor/product you choose can support what you want to do with the LMS, and that the LMS is in line with your key business drivers. — 256

Meets your current and possible future needs. Upgrading and other improvements are well-managed, well-documented, and advance scheduling is provided. Other customers are satisfied with this vendor, and the vendor can provide customers willing to talk with you about their experience. They should have a big enough market share to provide some stability that they won't be going through a merger 48 hours after you sign with them. Should they be acquired, there will be some guaranteed level of continuity of service.   Online support and documentation uses their very own LMS or LCMS providing excellent instruction and user tips. Integration with additional e-Learning tools: Very important to know the ease or complexities involved in successfully integrating third-party tools or additional software platforms into their LMS/LCMS. Good luck. — 264

Must see how the system works and use it during a trial period. Don't pay attention to the marketing hype about how the system will change during future releases. — 270

Do research and testing. Have a list of requirements and be very specific with the sales people and don't take their word for it, make them show you that it works. Use email to communicate with them so you have documentation of their promises. Obtain access to a demo site and try setting up a shell of your organization. Talk with the vendor's Tech Support people. Sales people tend to make promises that the tech support people can't keep. — 293

Research your current and future (five years) requirements and LMS/LCMS vendors (cost, reliability, hosting, scalability, etc.) prior to approaching any vendors. Have your questions ready. — 295

Research, research, research. Dialogue with many vendors. Get exposure to as many demos as possible. Identify your goals and requirements as early as possible. Clearly communicate these to your potential vendors. Ask for a sandbox to try out the software. Define what your immediate and long-term needs are. Scalability is very important. — 296

Review as many different products as possible and evaluate each one on a specific rating scale customized to the institution's online instructional goals. Strategic planning, and decisions regarding what the institution wants the system to accomplish, is key in selecting a solution that will meet all of the needs effectively. — 297

VIII. Tips for managing vendor involvement *continued*

Robust RFP process with scenario-based business tasks for each vendor to demonstrate including loading content within their system, reporting, training administration, and handshaking with other systems. — 302

Select the right vendor, one that can align with your strategies and that commits to your long term business goals. — 308

Selecting an LMS/LCMS starts with a well-written RFP to allow for complete and potentially unbi-ased reviews of vendors and their products. — 310

Select a vendor with financial viability that will not be acquired within 12 months of selection — a vendor with experience with organizations similar to yours. — 311

Simply put, come up with as many use cases as you can, define how you want them to work togeth-er, then put that in your RFP. Then require vendors to demonstrate that in action, on a live system. A list of requirements is just not enough. — 318

Start big. Identify all of the major and minor players, then start eliminating them based on certain criteria such as longevity, features needed, etc. We bought Bersin's LMS study and it helped us to identify the major players and eliminate the smaller companies that wouldn't do what we needed. — 322

Look at how a company uses or does not use their own products. Look at how a consultant uses or does not use the products and services on which they consult. — 329

Talk to other companies that have implemented the same LMS to find out how satisfied they were with the implementation and post-implementation support. — 331

The most important thing to focus on is AICC and SCORM. Also evaluate the LMS based 100% on its current features. Selecting an LMS on the vendor's future promised features or that next release still in beta (but only "weeks" away) is a mistake every time. — 351

Use of "use cases" vs. extensive RFP but on-site demo using a script that points specifically at the company needs vs. an overview of the system from the vendor's perspective. — 380

Verify the vendor's past success rate implementing the system. Question how many people do they employ and what their roles and responsibilities are. How is support handled (Tracking)? Are cus-tomer suggestions used to enhance the system? Are customers charged for every little question or modification under the heading of customization, or is there a true collaboration? How do they work with third party vendors or suppliers? Can they support both an ASP and an internal model? — 384

Work with a LMS vendor that wants your business, meaning they want to help you be successful. Post-sales support is critical to having an effective LMS system, and often times LMS vendors fail miserably in offering good technical support. — 396

IX. "Other" tips

According to me, base the selection of an LMS/LCMS system on the simplicity to implement new functions that reflect the expansion of the e-Learning organization. — 63

AICC compliance should be mandatory, SCORM optional. It should be an LMS. LCMSs should be banned. Learning Content Management Systems are diverting time, effort, and precious cash from the true function of Training and Learning Management. They are also training a whole generation of dummies who think that learning can only ever be page after page. The Web site of the LMS provider must provide more than marketing material. If all they provide are statements of how wonderful they are … don't use them. You will be tied into their system and not even SCORM or AICC compliance will let you escape from that. There will be one little catch … select your LMS based on your reports. Ensure that your LMS provides the reports you need to prove that your training is both effective and cost effective. Otherwise, you won't get another chance to find a better system. — 65

You need a basic understanding of IS, project management skills, and HR generalist knowledge. — 77

Be firm in your requests for functionality and never agree to be a "guinea pig" as the first customer for a particular functionality. — 82

Decide if you're willing to work outside the firewall. Most successful solutions can be done without the horrendous services costs affiliated with behind-the-firewall solutions. — 115

Develop the program to include how to integrate all aspects of the LMS process — from content presentation, to review, to assessment, and finally to reconciliation of assessments. — 132

Don't let your Training Managers make the LMS selection. — 142

Don't look at the features — look at the user interface and the handling. Keep it simple! — 145

Find experts (consultants) or do research. — 165

First of all, hire qualified and experienced people who know how to manage an LMS. Do not use the LMS to place design and development standards, except those limited to the functionality of the LMS. — 167

Get an installation of the LMS to play with before making a decision — ideally installed on your local servers. — 183

Interview other people who have deployed LMS's and what they like, do not like, and "wish list" items. Also, do not skimp on storage space. — 213

It must be a better way than open source is already offering! — 216

It's all contextual, so … it depends. I think this is a valiant idea, I however believe that someone who is going to be in charge of the LMS for the school or company needs to possess some sort of LMS administration knowledge before delving into that project. — 221

Keep in mind, not one LMS/LCMS is necessarily good for every application. — 224

First of all, hire qualified and experienced people who know how to manage an LMS. Do not use the LMS to place design and development standards, except those limited to the functionality of the LMS.

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IX. "Other" tips *continued*

Know your pedagogical models. — 237

Make sure it integrates with the rest of your software, especially active directory, human resources, and report generation. — 252

Many aspects are important to consider, among them is suitability for diverse users (ADA) and the possibility for interaction and collaboration that is as close to authentic as possible. — 261

My experience is that it's often administrative measurements that are used to evaluate and decide for a LMS in educational settings. It's the ability to integrate into the administrative system that decides which system to purchase. Although pedagogical consideration is valued, the final decision is not made upon them. — 273

Recognize that there is another option, i.e. the Training Management System options (which can fill all of the hands-on processes of managing the training function) and some of the Content Management or other learning/knowledge management requirements. A full blown LMS or LMS plus C (content) is a matter of degree and functions that need systems support. The point is that it's not necessarily the best idea to take the great leap if you only need to concentrate on managing the training processes with system support — let the systems serve your needs instead of buying into a huge system that will make you serve its needs! — 290

Scalability — 303

See it in action on other customer's sites. — 306

Seven years ago when we were updating our CBT from DOS to Windows-based delivery, we went shopping for a learning management system to purchase. We had used our own internally-built, proprietary system for years. Our problem was that we could not find a system that allowed an objective to be accomplished more than once. We were told that that was not necessary because once an objective is taught there is no need for the student to accomplish that objective again. That may be all well and good, but in some disciplines, e.g., aircrew training systems, where there is a requirement for the student to maintain a set of competencies, there is a need to re-accomplish the same objectives. A learning management system must be flexible enough to address these types pf issues. The end result was that we rebuilt our "old" TMS (training management system) in Windows. You cannot be rigid and assume you know everything about training. You need a number of different disciplines to provide their input before you build an LMS. — 314

Someone who is currently using an LMS is key. — 319

Talk to other users already in possession of it, and specifically ask for the negatives about that LMS. — 332

A thorough review of competitive products; final decision based on functionality and not name. — 360

It's important to know the styles of learning of the personnel in the organization. — 365

Understand and manage all integration points between the LMS, the HRMS, and financial systems.

John Hayes

IX. "Other" tips *continued*

Tools, tools, and more tools. There must be freely available tools for authoring content easily and intuitively. Tools for embedding results into Web pages. Tools for delivering content over the Web without the need to download viewers, and so on. Javascript-based tools for display are better, or maybe Java applets. — 366

Understand and manage all integration points between the LMS, the HRMS, and financial systems. — 375

We are currently selecting an LMS/LCMS. Our mantra is, "Buy something that is proven to work today — do not buy a future release." — 386

Cross-platform, cross-browser tools like those written in Java and JavaScript. — 366

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42. Tom Adams, eLearning Developer, Sprint Nextel Corporation

43. MaryBeth Jones, Training Design Specialist, RCIS

44. L. Ravi Krishnan, Design head, Trina

45. Matthew Murray, Assistant Director, CADE/UIC

46. JoAnn Escobedo, eLearning Designer Developer, Waste Management

47. Vinit Thakur, Chief Learning Officer, US Technology

48. Mary Arnold, WebCT Administrator, Royal Military College of Canada

49. Joseph Williams, Partner, Exegi

50. Dennis Hess, Sr. Training Specialist, Georgia Power Co. Training

51. Laura Levy, Manager, HCA

52. Lisa Hoffmann, Education Services Consultant, MindLeaders

53. Ron Beaumont, Technical Development Manager, Mondial Assistance

54. Theresa Cross, Instructional Technologist, WVU at Parkersburg

55. Beth Freeburg, Associate Professor, Southern Illinois University

56. Jamil Ahmed, Country Manager, Private

X. The Tipsters *continued*

57 Gail L'esperance, Instructional Systems Specialist, IRS

58 Cynthia Smiszek, Training Specialist

59 Michel Gignac, Knowledge Management Consultant

60 Darren McKeen, Director of Technical Publications, ColdSpark

61 Don O'Guin, Senior Manager, e-Learning, Pfizer

62 Brian Austin, Validated Learning Manager, Certiport

63 Alessandro Costantino, Project Manager, Manzonionline

64 Sandy Elvington, Sun Microsystems

65 Michael Richards, eLearning Consultant

66 Sanet Haupt, University of Pretoria

67 Angie Vazquez, E-Learning Design Manager, Hallmark Cards

68 Fr. Benigno P. Beltran, SVD, Executive Director, Sandiwaan Center for Learning

69 Mark Gressin, LMS Administrator, Morgan Stanley

70 Brian Richards, Systems Consultant, Carnegie Mellon University

71 Michael Gadomski, Instructional Designer, Nationwide Financial

72 Carol Taylor, Manager, Instruction Programs Development, Chicago Transit Authority

73 Tanya Cardoza, Systems Administrator, Sodexho

74 Kishor Mistry, Technology Based Training Manager, Cathay Pacific Airways

75 Garry Nordenstam, President and Strategic Learning Architect, ThinkWorks Inc.

76 Ceil Tilney, BDE

77 Jeff Cicone, Talent Management Consultant, John Hancock Financial Services

78 Christy Tucker, Assistant Director of Course Development, Career Education Corporation University Group

79 Kathi Krause, Learning Systems Specialist, Benjamin Moore & Co.

80 Jeannie Vorse, Instructional Designer, Bellagio Resort

81 Steve Holloway, National Client Liaison Manager, Learning Curve

82 Teresa Adelson, eLearning Team Lead, Zurich in North America

83 Karen Humes, Project Consultant

84 Nanette Stillwell, Dept. Chair, Information Systems Curricula, Pitt Community College

85 Emily Boyd, Learning Technologies Sr. Specialist, American Family Insurance

86 Robert Morgan, Assistant Campus Director/Director of Distance Learning, Southeast Community College

87 Eugene O'Loughlin, Lecturer in Informatics, National College of Ireland

88 Sunni Sterneker, Virtual Learning Director, South Central Kansas Education Service Center

89 Naomi Gee, IT Consultant

90 Kara DeFrias, Instructional Designer, NJM Insurance Group

91 Sue Brown, Manager, Web Publishing and eLearning, Arkema Inc.

92 Gerry Rayner, Lecturer, Monash University

93 Alex Roussakis, Team Leader, e-Learning and Strategic Partnerships, PWGSC

94 Sachin Uttam

95 CarolAnn Shepherd, President, Creative Answers Corporation

96 Alex Bell, Trinity

97 Kelley Mesterharm

98 Dwain Craddock, Director, Training, Charles Schwab

99 Kurt Melander, Instructional Technology Specialist, Northrop Grumman

100 Bernie Josephson, Training Coordinator, CCRL

101 Judith Scanlon, Web Content Specialist, EDMC

102 Linda Johnson, Technology Coordinator, Elementary School

103 Kathryn Potter

104 Diane Krieger, Instructional Designer (informal LMS Manager!), Bethpage FCU

105 Mary Carpenter, Learning and Development Consultant, Wells Fargo

106 Jill Easterday, Consultant

107 Philip Ayoo, Lecturer/student, Makerere University

108 Karen Long, Trainer, Network Solutions

109 Simon Cowan, Senior Media Developer, Atlas Interactive

110 Gene Schembri, Sr. Sports Consultant, Australian Sports Commission

X. The Tipsters *continued*

111 Enrique Garcia, Trainer/Professor, Laredo Community College

112 Aletha Cole, Instructional Designer, eCopy

113 Jonathan Younger, Chief Learning Officer, National City Corporation

114 Bonnie Becker, Sr. Training Manager, Packeteer

115 Jerry Gasche, Vice President, Sparrow Interactive

116 Barbara Kidzus, Project Manager, Distance Education, AHIMA

117 Debra Rogers, Webmaster/ Instructor, Georgia Virtual Technical College

118 Simon Curry, Project Manager, Lehman Brothers

119 Anne Palmer Johnson, Director, Distance Learning, BMRA

120 Ken Hirsohn, Curriculum Development Manager, Salesforce.com

121 David Blattenberger, Supervisor, Media and Technology Services, Tyco Safety Products Institute

122 William Ryan, National Leader of Technology, Humana Inc.

123 Amie King, Program Manager, Intellinex

124 Sheila Kieran-Greenbush, Manager, IT Training and Instructor Instructional Technology, Columbia University

125 Scott Hand, Chief Architect, Air Force Flight Test Center

126 Vivek Ratna, Partner, Global Learning Group

127 K. Jorgensen, Widex

128 Christine Ahlsten, Instructional Designer, North Dakota State College of Science

129 Lonny Buinis, Instructional Designer, Raritan Valley Community College

130 Lynette Mason, Manager, Specialty Training Applications, AMERIGROUP Corp.

131 Elizabeth Cunningham, eLearning Team Lead, Lowe's Companies

132 Bill Denton, Director of Training, Norms Restaurants

133 Wendy Frederick, Chief, Learning Technologies Branch, Bureau of Alcohol, Tobacco, Firearms and Explosives

134 Paul Clothier, Principal, LearnHost

135 Charisse Bellamy, Instructional Designer, TIAA-CREF

136 Pardo Mustilo, VP, Affinity Solutions Inc.

137 Michael Reakes, E-Development Team Leader, Saudi Aramco

138 Doug Moody, Technology Teacher, Middle School

139 Ron Henderson, Sr. Content Manager, 360training

140 Joe Ganci, President, Dazzle Technologies Corp.

141 Michael Massa, OD Manager, UPS SCS

142 Susan Casillas

143 Michael Baker, Information Resource Consultant II, SC Dept. of Social Services

144 Unused

145 Matthias Rœckel

146 David Norman, Perf. & Emp. Development Mgr., Wash. Dept. of Info. Serv.

147 Tony Treacy, Director of eLearning, Solent Training & Development Ltd.

148 Unused

149 Lori Swinney, Assistant Director, University of North Dakota

150 Keith Koh, Senior Consultant, eLC

151 Dr. Jasir Alherbish, GOTEVOT

152 Giuseppe Boccoli, Resource Manager, Nokia

153 Unused

154 Kevin Preston, Learning Network Manager, Catholic Health Initiatives

155 Jayne Bartlett, Sr., Instructor, Geisinger Health System

156 Suzanne Rinker, Group Manager, Instructional Technology, Wyeth

157 Glynn Jung, Learning Architect, Learning Leadership

158 Loretta Donovan, President, Worksmarts

159 David Schlesinger, Director, Brand Support Technologies, Hilton Hotels Corp.

160 James Lloyd, Training Developer, Promega Corporation

161 Kathy Adams, Team leader e-Learning, Affinity Health

162 Cheryl Lisker, elearning specialist, Take Charge America

163 Benedict Fernandez, Course Manager, Temasek Polytechnic

164 Frances McDonald, Asst. Professor, ELI, NVCC

165 Iris Peceny, Senior Training Professional, PeCon

166 John Domanick, Director, Clinical Education & Development, Invacare Corporation

167 Ernie Thor, Sr. Instructional Designer, Cingular

X. The Tipsters *continued*

168 Pamela Koogler, Training Administrator, Northrop Grumman

169 Chris Willis, CEO, Media 1

170 Tricia Luke, Technical Training Specialist, Staff, QUALCOMM, Inc.

171 Posey Cochrane, Coordinator, Development Support Services, Methodist LeBonhuer Healthcare

172 Nancy Bukovina, Director, on-line training, SetFocus

173 M. S. Kumar, Senior Manager, Thermax Babcock & Wilcox

174 Erik Win, Associate Professor, Lund University

175 Gaurav Gupta, Learning System Specialist, Deloitte Services

176 Mertkan Akay, Manager, Training, Ford of Turkey

177 Eduardo Gutierrez, CARE Academy Web Master and Project Manager, CARE

178 Tim Carlson, Training & Certification Mgr., Nokia

179 Tom Sehmel, Program Manager, Technical Online Learning, Cingular Wireless (before lay off)

180 Roger Steinhorst, LMS Administrator, Fireman's Fund

181 Bonni Baird, Consultant

182 Dennis Holfels, LMS and Training Deployment Manager, Schneider Electric

183 Dan Norris, QR

184 Mark Hagerty, Training Consultant, Clorox

185 Anne Ballard, Instructional Systems Manager, Naval Medical Education & Training Command, US Navy

186 Norman Lamont, University for Lloyds TSB

187 Kathy Bloom, Training Manager, IDT

188 David McClelland, eLearning Specialist, Kodak

189 Phil Wakefield, ILT Manager, Stockport College

190 Mary Kramer, Director of Training, ClubCorp

191 Juli Drohan, Sr. Systems Analyst, Fidelity Investments

192 Mark Henry, President/CEO, Mark Henry Enterprises, Inc.

193 Ron Lubensky, Director, Click Craft Pty. Limited

194 Mark Sutton, Worthy Performance

195 Amy Hensley

196 Rebecca Kuhlman, Visual Communications Consultant, Fredrickson Communications

197 Unused

198 Mark Moore, e-Learning Strategist, Verizon

199 Heike Philp

200 Fred Sollish, Managing Director, eParagon LLC

201 Joseph Novosel, Director of CE Training, CompUSA

202 Christopher McSpiritt, LMS Administrator, ePharmaLearning

203 Lawrence Bechtel, Senior Instructional Designer, Fidelity National Information Services

204 Fred Banks, CBT Software Engineer, The Boeing Company

205 Helen Coleman, Manager, New Hanover Regional Medical Center

206 Ann Yelle, Director of Distance Learning, UAH

207 Rakesh Poddar, Senior Instructional Designer, Lionbridge

208 Jon Cottrell, Sr. Systems Analyst, Medco Health Solutions

209 Chris Nekvinda, Performance Consultant, National City Corp

210 Unused

211 Michael Judge, Director, Distance Learning, Morehead State University

212 Phil Rees, Learning Technologist, University of Oxford

213 Jamie Kristofco, Financial Systems Training Manager, ING

214 Andre Martin, Manager, Quality Training, Canadian Blood Services

215 Bee Leng Ong, Business Development Mgr., Informatics

216 Ina deGroot, ilisa

217 Susan Phares

218 Hermann Green, Training Spec. 2

219 Niels Peter Johansson, Senior Flash Developer, Effective-Learning AS

220 Armen Papshev, eLearning/LMS Manager, Schering Plough

221 Chris Burley, Learning Technologies Developer, UC San Francisco

222 K. C. Eldridge, Director, e-Learning, Advanta Bank Corp.

223 Ron Terry, Senior Manager, Learning and Development

224 Connie Gallagher, e-Learning Manager

225 Doug Gifford, Learning Process Lead, Sara Lee

X. The Tipsters *continued*

226 Kenneth Weir, Mass Spectrometry Training Specialist, Applied Biosystems

227 Sandra Wesley, Director, Training and Communication, Johnson & Johnson PRD

228 Jeff Tang, Training Manager, NOVO ETS

229 Jill Hughes, Elearning Training Consultant

230 Jodie Strong, Systems Education Manager, Australian Business Limited

231 Judy Breau

232 Kerry Hodgins, Education Coordinator, Royal Ottawa Health Care Group

233 Art Wakefield, Lead Technical Analyst, Carlson Hotels Worldwide

234 Kim Ziprik, Manager, Learning Technologies, Randstad

235 Mark Warmbrand, Manager Technology-based Learning, PETCO

236 Shannon O'Keefe, Technology Training Manager, PwC

237 Unused

238 Marti Icenogle, Learning Consultant Technologies, Roche Diagnostics

239 Joe Kyle, Instructional Technology Strategy and Infrastructure, Motorola

240 Chris Marth, Manager Instructional Design & Development, Elsevier MDL

241 Judith Blair, Partner, Brains at Work

242 Patricia Lake, Instructional Designer, P&L Solutions

243 Randi Treilman, Geriatrics Education Coordinator, SGI-Miami Jewish Home and Hospital

244 Khalid Shaikh

245 Anne Winter, Organization Development Project Manager, Milwaukee Electric Tool Corp.

246 Joseph Smith, Project Manager, OPM GoLearn

247 Michel Menges, e-Learning Manager, Amadeus S. A. S.

248 Clark Quinn, Director, Quinnovation

249 Tanya Wolfe, Manager, Online Learning Services, Southbank Institute

250 Mary Eileen Lechleitner, e-Learning Consultant, CareSource Management Group

251 Unused

252 Sharon Biegel, Trainer, Community Health Partnership

253 Debi McGuire, Director of Distance Learning and Professional Development, Wilkes Community College

254 Unused

255 Benjamin Duffy, eMedia Developer/LMS administrator, Fairchild Semiconductor

256 Gillian Jeffy-Anderson, e-Learning Specialist, Allianz Life

257 Unused

258 Jean Tertl, e-Learning Manager, The Clorox Company

259 Greg Willmarth, e-Learning Training Consultant, Standard Insurance Company

260 Darve Horak, Curriculum Developer, Texas Health and Human Services

261 Carolyn Parkins

262 Chris Sutton, Southbank Institute of TAFE

263 Cynthia Russell, Professor, University of Tennessee Health Science Center

264 Eve Kedar, Elearning Designer

265 Patricia Ottaviano, Systems Analyst, IESA

266 Ana De la Camara, R&D Manager, CompuEducacion

267 Yotam Kramer, E-learning Project Manager, NICE Systems

268 Stephen Hadlock, Training Manager, Sento Corporation

269 Bonnie Stone, Sr. Administrator Learning & Development, Central Arizona Project

270 Unused

271 Loreta Ferguson, Content Developer

272 Fatenah Issa, Senior Regional Education Quality Manager of Technology, Catapult Learning

273 Raymond Kolbaek, School of Nursing, University College

274 Sheila Cook, Corporate Facilitator, St. Joseph's Health Care, London

275 Mary Camp, Supervisor, User Experience & New Media, NJM Insurance Group

276 Barbara Mayron, Learning Consultant

277 Melinda Lyons, Assessment Coordinator, Northcentral University

278 Don Yanaitis, Training Manager, The Children's Hospital of Philadelphia

X. The Tipsters *continued*

279 Sylvia Dribnak, Instructional Designer, CIBC

280 Westley Field, Director of Online Learning, MLC Sydney

281 Susan Reed, Trainer, Anthem

282 Christine Young, Call Center Analyst, CaseRev

283 Rob Dahl, Production Manager, Pinnacle Performance Group, Inc.

284 James Beckmeyer, e-Learning Application Programmer, DENSO Manufacturing Michigan, Inc.

285 Heidi Tollefson, e-Learning Content Development Specialist, Yahoo!

286 Bruce Smith, Corporate Manager, eLearning, Emerson

287 Robin Fruitticher, E-Learning Development Manager, Powell's Books

288 Mary Lynn Monge, Instructional Design Lead, OAKS Project Management Office, State of Ohio

289 Jay Allen, e-Learning Program Manager, U. S. Coast Guard

290 Roy Reese, Director, Dept. of Special Projects, Columbus Consolidated Govt.

291 Kathy Napierala, Sr. Systems Programmer/eLearning Strategist, GEICO

292 Scott Trefren

293 Louann Engel, Training Development Specialist, McNaughton McKay Electric Co.

294 Beate Vagt-Traore, Instructional Designer, Zaxby's Franchising, Inc.

295 Victoria Sandvig, Training Coordinator, Wyle Laboratories

296 Gaylene Galliford, Manager, Training, Design & Development, Apria Healthcare

297 Linda Kaiser, Instructional Designer, Panhandle State Bank

298 Alexandra Mondez, Ingeniera, Alyatec

299 Marilyn Walker, Technical Program Manager, LifeCenter Northwest

300 Terry Follmer, MLD Program Mgr.

301 Meg Yanalunas, Instructional Designer, Walsh College

302 Unused

303 Margaret Collins, e-Learning Project Leader, Progress Software

304 Johnny Rivli, Managing Director, Braincraft

305 Tricia Allen, Training Program Manager, Polycom, Inc.

306 Diana Scott, Online Learning Manager, Express Services, Inc.

307 Matt Brewer, Business Applications Training Consultant, Chubb Insurance Company of Europe

308 Marcos Fontela, CCO, AXG Inc.

309 Catherine Manning, Graduate Student, Macquarie University

310 Tonia Grigg, LMS Administrator, TEEX

311 C. Green, JLI Systems

312 Orlando Castillo, Director of Education Services, St. Joseph Regional Health System

313 Rita Sparkman, Online Learning, TASB

314 Barbara Bates, Senior Instructional Designer, C-17 ATS, Boeing Aerospace

315 Maureen Douglas, Coordinator, Business/Technical Writing, Oakton Community College

316 Timothy Boyd, Military Analyst, Cubic Defense Applications

317 Paula Cancro, IS Training Specialist, IFMG, Inc.

318 Erick Emde, Instructional Developer/LMS Admin., EarthLink, Inc.

319 Sue Paige Mastin

320 Sang Mok Jeong, KNUE

321 Leslie Newland, Instructional Designer, The Boeing Company

322 Russ Hall, Learning Architect, First Interstate BancSystem

323 Tomas Hall

324 Patricia Keithan, Learning Architect, Training Designs

325 Marielle Patronis, Zayed University

326 Melissa Kaltenberg, Owner/Consultant, Bell Canyon

327 Lynn Baron, Instructional Developer, e-Learning, McGraw-Hill Ryerson

328 Irene Morrison, Sr. Training and Development Instructor, Nationwide Financial

329 Ellen Paxton, Founder, Professional Learning Board

330 Heather Kelley, Senior Instructional Designer, Nemours

331 Jennifer Zapp, e-Learning Specialist, Latham & Watkins

332 Simon Smidt, ATFCM training specialist, Eurocontrol

333 C. Fisher, Instructional Technology Specialist, NFSTC

X. The Tipsters *continued*

334 Mary Austin, Chief, Technology Enabled Learning, IRS

335 Sam Taylor Jr., Learning Specialist, World Bank Group

336 Julie Hustad, Training Specialist, Brown Shoe Company

337 Terry Gawlas, Technical Training Consultant, Highmark

338 Unused

339 Alan Gandy

340 Cecilia Vlk, Technical Director, Camber Corporation

341 Steve Kauffman, E-Learning Manager, Intuit

342 Cindy Pandke, Manager, Learning Services Development, ADP Canada

343 Mohit Bhargava, President, LearningMate Solutions (Canada) Ltd.

344 Marla Landreth, Sr. Learning Technologist, InfoGenesis

345 Diwakar Boyanapalle, Advisor, Content Generation, Virtual Academy for the Semi-Arid Tropics (VASAT), ICRISAT

346 Andrew Palmer, DL Coordinator, Eastern ARNG Aviation Training Site

347 Anuj Kulkarni, E-Learning Consultant, L&T Infotech

348 Mark Uhlenberg, Training Specialist, Monsanto Company

349 Warren Longmire, Sr. Instructional Designer, Apple Computer

350 Paula Bradshaw, Manager of Instructional Design, Inter-Tel

351 Chris Phillips, Performance Technologist, Sprint Nextel

352 Ole Kristensen, Senior e-Learning Project Manager, Grundfos Management A/S

353 Rodolpho Arruda, Online Learning Specialist, ALZ Consultoria

354 Don Wagner, Information Technology Specialist, Defense Finance & Accounting Service

355 Loreta Ulmer, Instructional Designer, Old Dominion University

356 Junaid Wajid, Business Analyst, Raytheon

357 Dawn Callahan, Director, Training and Staff Development

358 Samir Desai, Learning Infrastructure Product Manager, Accenture

359 Frank Nguyen, eLearning Tech Manager, Intel

360 Michael Fimian, Instructional Tech. Design Specialist, Providence College

361 Patti Powell, Technical Training Project Manager, Swagelok Company

362 Terry Riney, Senior Manager Training, AOL

363 Heather Porterfield, Team Lead, American Red Cross

364 Katica Jacob, Learning and Development Rep III, Kaiser Permanente

365 Ronald Godonez, Production Multimedia, ICE

366 Anand Betanabhotla, Learners' Academy

367 Unused

368 Ben Metherell, eLearning Consultant, The Muir Electrical Company

369 Renee Dorminy, Training Specialist e-Learning, WorldTravel BTI

370 Adam Tarnoff, Provost's Specialist for Learning Technologies & Assessment, Loyola University Chicago

371 Jose Felipe Araujo

372 Randi Roger, Project Manager, Pearson Learning Solutions

373 Rebecca Heinich, e-Learning Course Designer/Developer, IRS

374 David Ward, E-Learning Manager, American Association of Critical-Care Nurses

375 John Hayes

376 Bruce Havelock, Learning Architect, Accenture

377 Luca Botturi, Ph.D., eLab USI/SUPSI

378 Michael Drummond, Director of Instructional Technology, Mercer University

379 Unused

380 Janet Clarey, Claims Training Coordinator, Utica National Insurance Group

381 Mark Guerin, Manager, Technology Training, Brown Brothers Harriman

382 Shirley Oliphant, LearnNET Show Producer, Univar USA

383 Linda Forster, Product Manager

384 Linda Butler, Sr. Learning Specialist Manager, Prudential Financial

X. The Tipsters *continued*

385 Andrea Stone, Training Coordinator, Oklahoma Guaranteed Student Loan Program

386 Adam Goldthorp, LMS Project Manager, Picis Inc.

387 Michael Kryshak, Director, Research and Education, The Graduate University for Advanced Studies

388 Tim Kelly, Instructional Technologist, Dowling College

389 Jennifer De Vries, President, BlueStreak Learning

390 Mark Wilderspin, Director, Interactive CPD Ltd.

391 Cathy Kolongowski, Instructional Technology Analyst, Villanova University

392 Henry Meyerding, Instructional Designer, Philips

393 Charles Doolittle, Sr. Technology Analyst, EMT Associates, Inc.

394 John O'Connor

395 Cindy Feagins, Product Training Administrator, Aviall Services, Inc.

396 Unused

397 Deborah Nugent, Instructional Designer, Granite State College

398 Chester Whitfield, Chief, Communications & Publications, National Institute of Corrections

399 Unused

400 Jane Mullooly, Associate Director, Learning and Development, Eisai

401 Jake Hunter, E-learning Coordinator, Mercury Payment Systems

402 Victoria Rogers, AVP, Distance Learning Network, Countrywide Financial

403 Fredia Dillard, Instructional Designer, UAB

404 Anastasia Trekles, Coordinator of Education Media, Purdue University Calumet

405 Kimberly Berry, Instructional Coordinator, Fulbright & Jaworski, LLP

406 Dirk Becker, Project Manager. OMAA

407 Soma Chakrabarti, Project Manager, University of Kansas

408 Nicole Dawson, Manager, Recruitment & Learning Solutions, Global Technology & Operations, Royal Bank of Canada

409 Doug Dede, Field Learning Manager, XO Communications

410 Tim Haapoja, AVP, JP Morgan Chase

411 Jack Latshaw, Assistant Director, Geisinger Health System

412 Kirk McCullough, CSC

413 Jason Mock, Director, Course Production, Human Kinetics, Inc.

414 Darren Morris, Writer/editor, CTE Resource Center

415 Satish Narayanaswamy, ID, Infosys

416 Elizabeth Wallace, Director, eTech Ohio

417 Jacqueline Wilson, Educational Technologist, The University of the West Indies

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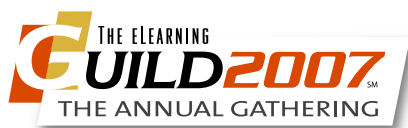| Guild Benefits	Associate	Member	Member+	Premium
eLearning Insider	✓	✓	✓	✓
Annual Salary Survey	✓	✓	✓	✓
Past Conference Handouts	✓	✓	✓	✓
Resource Directory – Access & Post	✓	✓	✓	✓
Info Exchange – Access & Post	✓	✓	✓	✓
Job Board – Access Jobs & Resumes	✓	✓	✓	✓
Job Board – Post Resumes	✓	✓	✓	✓
Job Board – Post Jobs	✗	✓	✓	✓
Guild Research – Online Briefings	✓	✓	✓	✓
Guild Research – Reports	✗*	✓	✓	✓
Guild Research – Archives	✗	✓	✓	✓
Learning Solutions e-Magazine	✗*	✓	✓	✓
Online Forums – Archive	✗	✗	✓	✓
Online Forums	$	$	✓	✓
Face-to-Face Conferences	$	$	$	✓*
Pre-Conference Workshops	$	$	$	✓*
Event Fee Discounts	✗	20%	20%	20%
Other Event Site License Discounts	✗	✗	20%	20%

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LEARNING MANAGEMENT COLLOQUIUM℠
April 11 & 12, 2007
BOSTON

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