8 STEPS TO SELECTING YOUR ASSOCIATION LMS

by digitec interactive

PLAN AHEAD

STEP 1 2 3 4 5 6 7 8

These days, learning management systems are simpler than ever to implement and integrate with existing third-party systems your association may already be using, such as your association management system (AMS); however, a successful implementation depends on planning ahead.

Part of the planning process needs to include market research, budget submittals and creating a project timeline.

Market Research

Like any business decision, you should start by determining the need. Is continuing education or certification required in your industry? How receptive is your audience to learning online? Are there other resources available in the market that your members may already be using? What are the costs of alternatives, so you can determine a price point? To answer these questions, you might consider surveying your members to gauge the interest and the need. These survey results can help you build the business case to justify your association's investment.

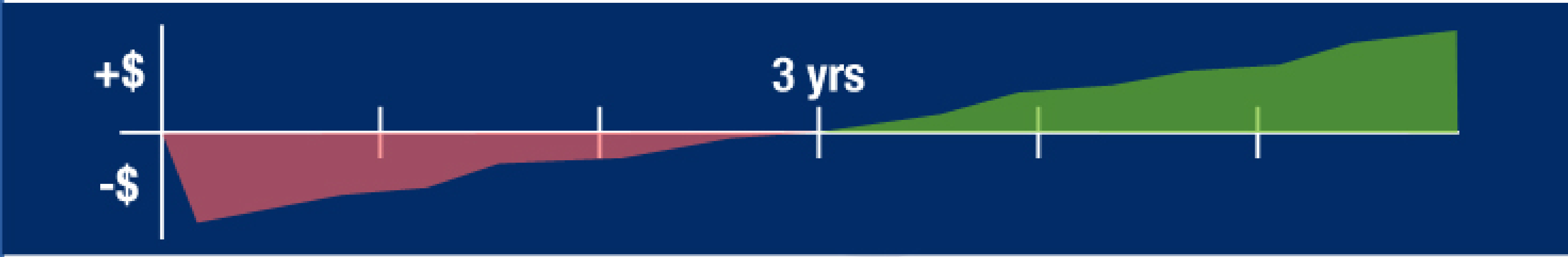
PLAN AHEAD

STEP 1 2 3 4 5 6 7 8

Budget

eLearning is a proven way to generate non-dues revenue for associations. eLearning can also attract new members, who see eLearning as an attractive member benefit, saving them time and money over more traditional training options. But if your association is going to offer eLearning for the first time, you may not have a budgeted line item for the LMS or your eLearning course production.

Ideally, the survey results from the first step will help you validate the need for online learning and estimate the potential revenue. To do this, you'll want to determine a price point for the course or courses you will offer, and then, multiply this amount by the number of learners you believe would purchase the course. Based on this, you can determine the estimated revenue from eLearning.



Typically, the initial investment for an LMS and course development will be higher than the amount of revenue you can expect in the first year. Typically, the profits increase year over year, as the initial investment is amortized. It's a good idea, though, to make sure that the investment will pay for itself in the first three years, so that you can start to see increasing revenues over time.

The budget should include the initial costs and the expected revenues over time, so that the board or your stakeholders can see the potential return on investment.

PLAN AHEAD

Create a Realistic Timeline

Start with the date you want to have the system online and fully accessible to members, and then work backwards to determine when you need to start sending out member surveys, attending tradeshows, researching solutions and writing your requirements document. The graphic below is a sample of a long-term timeline. Your association may be able to accelerate these dates, but it's a good idea to consider these milestones, so that you get a clear, shared vision of where you're going and buy-in from the stakeholders.

JANUARY-MARCH	APRIL	MAY-AUGUST	SEPTEMBER
Send out member surveys Attend Tradeshows Research LMS	**4/1 - 4/15** Write Requirements Doc **4/21** Requirements Doc Approved **4/22 - 4/30** Develop Proposed Budget	**5/1** Submit Proposed Budget	**9/30** Budget Approved
OCTOBER-NOVEMBER	**DECEMBER**	**JANUARY**	**FEBRUARY**
10/1 - 11/30 Research Potential Systems	**12/1** Potential Systems Identified **12/1 - 12/31** Develop RFP	**1/1** Send out RFPs **1/31** Receive RFP Responses	**2/1 - 2/15** Review RFPs **2/15** Make Short List Decision/ Notify Vendors
MARCH	**APRIL**	**MAY**	**JUNE**
3/1 - 3/7 System Demos **3/7 - 3/15** Deliberations **3/15** Decision/Vendor Notifications	**4/1** Kickoff Meeting/Deployment	**5/21** Deployment Completed **5/21 - 5/31** Data Migration	**6/1 - 6/30** Content Migration/Creation
JULY	**AUGUST**		
7/1 - 7/14 Beta Testing **7/15 - 7/14** Final Updates	**8/1** GO LIVE!		

DOCUMENT YOUR REQUIREMENTS

One of the most important steps in choosing an LMS is to have clear requirements. Which features are you looking for in an LMS solution? Try to avoid “kitchen sink” lists. Prioritize what you need by these criteria:

Critical

Those features or functions that the LMS must have to integrate with your existing systems, your existing business model or path, or to ensure revenue.

Need to have

These are the baseline features that you need for your learners and for your administrators. To determine this list, you might want to develop a “use case.” For instance, from your learner’s perspective, what is the process that they would use to find, purchase and complete their learning? Or from your administrator and content creators’ perspective, what is the use case to generate reports, create learning events and activities and communicate with learners?

Nice to have

While creating the use case, make a list of the features and functions that would be nice to have, but that aren’t really necessary. For instance, the ability for learners to customize their profile with photos or write blog posts. Understanding what is “negotiable” will help as you choose vendors and compare costs.

DOCUMENT YOUR REQUIREMENTS

Be careful not to just copy another association's requirements. While it's tempting to repurpose a feature check list you find on the web or borrow from a fellow association professional, if you don't have a use case for a particular feature, it's better to make sure that you have a solid need for it before you add it to your requirements. Typically, the more features you add, the greater the likelihood that the vendor will need to customize their product to meet your requirements. A long feature list may result in you inadvertently narrowing potential LMSs to those that are more costly or complicated than you actually need. Also, additional features may require customizations that can increase the time it takes to implement and increase the overall budget.

Here are some helpful questions to consider when identifying the specific requirements for your LMS:

Do you plan to sell courses to members or offer them free of charge?

Do you plan to create your own courses? If so, do you need authoring tools?

Do you need a mobile ready solution?

Do you need to track and report on learner activity, or are you only interested in content delivery?

What types of learning will you offer: self-paced courses, in-person events, webinars?

MEET AND GREET

If you haven't done so already, now is the time to start reaching out to vendors who offer the type of LMS you are looking for, based on your requirements. Tradeshows are a great way to meet vendors face-to-face and get a demo of the system. Another resource for identifying LMS providers is independent research. Reports that describe LMS platforms designed specifically to meet the needs of associations and non-profits are available online.

It's a good idea to share your requirements with the vendors you have identified as potential solution providers to see how they think their systems measure up. If a system does not meet a majority of your initial requirements, chances are it's not going to be a good fit for your association and should be crossed off the list.

Make note of how responsive and knowledgeable the representatives are that you are dealing with. How easy is it to get in touch with the vendor? Are they willing and able to answer your questions? If an LMS vendor is unresponsive or hard to track down, this is red flag and an indication of the type of customer service you might expect after signing a contract.

DEVELOP YOUR RFP

A request for proposal (RFP) can be the most taxing part of the entire LMS selection process, but it doesn't have to be!

If you have done a good job selecting potential LMS vendors who meet your initial requirements, the RFP process should be pretty painless. Gone are the days when it was necessary to write a twenty page RFP. Today, it is more common to develop a 2-5 page RFP utilizing spreadsheets, rather than lengthy and repetitive descriptions of each and every possible feature.

If the prospective vendors all offer a hosted solution, you don't need to include that requirement in the RFP. Similarly, if you know you need an eCommerce shopping cart and have narrowed down your RFP recipients to only those companies that offer one, you don't need to include that requirement in your RFP.

Again, be careful not to just copy from another association's RFP requirements that may not be critical to your association or that may drive up the cost and drag out the implementation process. If you need help developing your RFP, consider hiring an LMS consultant who is familiar with the unique needs of associations and non-profits.

GET SELECTIVE

After you've developed your RFP, send it to no more than 5 LMS vendors. If you're not selective and send out your RFP to everyone, you'll be tasked with reviewing hundreds of pages of responses, from unqualified vendors.

Also, expect and allow for questions from vendors. Vendors who take the time to truly understand your needs and care to provide you the most thorough responses and accurate cost projections will likely have questions; be open to them.

When it's time to review the RFP responses, take a deep breath and be prepared to sift through each with a fine tooth comb.

Unfortunately, not all LMS providers are upfront and honest when it comes to answering questions about their system's features and functionality. If the responses sound too good to be true, there's a possibility that they are. Some LMS providers are known for responding with "yes" to every system requirement whether their platform has the functionality built-in or not.

To avoid disappointment and budget overages later on, be sure to ask to see these features in action during the product demo, should the vendor make it on your short list.

VENDOR PRESENTATIONS

After reviewing the RFP responses, pick the top 2 or 3 and invite those vendors to demo their systems for you and your team. Give the vendors a week or two to prepare for your system tour and be specific in describing which areas of the platform you would like to see. Generally, LMS demos are an hour long. If you know you will need more time or want to see how each feature can be applied to your particular situation, notify the vendor in advance and arrange for a slightly longer demo.

If you have a small group of stakeholders, consider having everyone present during the demo to make sure everyone's questions are addressed, including IT, Marketing, Member Services and of course Education and Training. If you represent a larger staff association, consider scheduling 2 demos – the initial demo for your Education and Training department and a second one to include IT, Marketing and Member Services. This will give you suficient time to thoroughly review the areas covered in the RFP without feeling rushed or overlooking important IT requirements. Either way, be sure to tell the vendor who from your team will be present during the demo.

This gives the vendor an opportunity to invite members of their product development team, marketing department or programming staff to be present for specific questions your team may have regarding system integrations, data migration or course promotion, just to name a few.

After the demo, schedule a meeting internally to discuss your thoughts on the system, and if necessary, arrange for the vendor to grant you and your team access to the system so you can test out certain features for yourself.

Here's a Tip:

You may want to consider allowing vendors to present online, through a web conference, rather than traveling to your location. This approach will enable the vendor to include their entire team on the call; otherwise, with the expense of travel, a vendor may not be able to send their entire team on every sales presentation.

CHECK REFERENCES

In general, it's a good idea to require references. This can really help you determine from actual customers the vendor's service after the sale. When provided by the vendor, take the time to call on references. This easily overlooked step can lead you to the most telling and helpful bit of information you'll discover during the entire LMS selection process.

Simply ask the shortlisted LMS providers to provide you with 3 or more references. Once you have the list in hand, pick up the phone and engage in conversations with each client. Consider asking them:

- what they like best and least about the LMS
- how their experience has been working with the company
- whether or not their deployment was completed on-time and within budget
- if there were any surprises

Completing these "client interviews" will bring you a great sense of understanding and confidence in your decision.

SEAL THE DEAL

STEP 1 2 3 4 5 6 7 8

Congratulations! **You're ready to announce your decision and seal the deal with your preferred LMS provider.**

If you've already agreed to the contract terms, there's nothing left to do but notify the vendor you've selected and send in the signed contract. After receiving the contract, the vendor will likely want to schedule a kickoff meeting.

In the meantime, take a minute to notify the other vendors who didn't make the final cut. Let them know why they weren't selected; they will appreciate your feedback.

After the selection process is over, the work to implement has just begun! But the good news is that if you have followed these steps and chosen your LMS wisely, you already have a solid plan to help ensure that the implementation will be a smooth one. Although eLearning has been around for over a decade, awareness and use of it is still just beginning. By moving to eLearning now, you will be signaling to your members that their association is looking to the future of learning, and will be there to provide them with the flexible learning products they need.

digitec interactive

1.800.942.4537 | www.knowledgedirectweb.com