

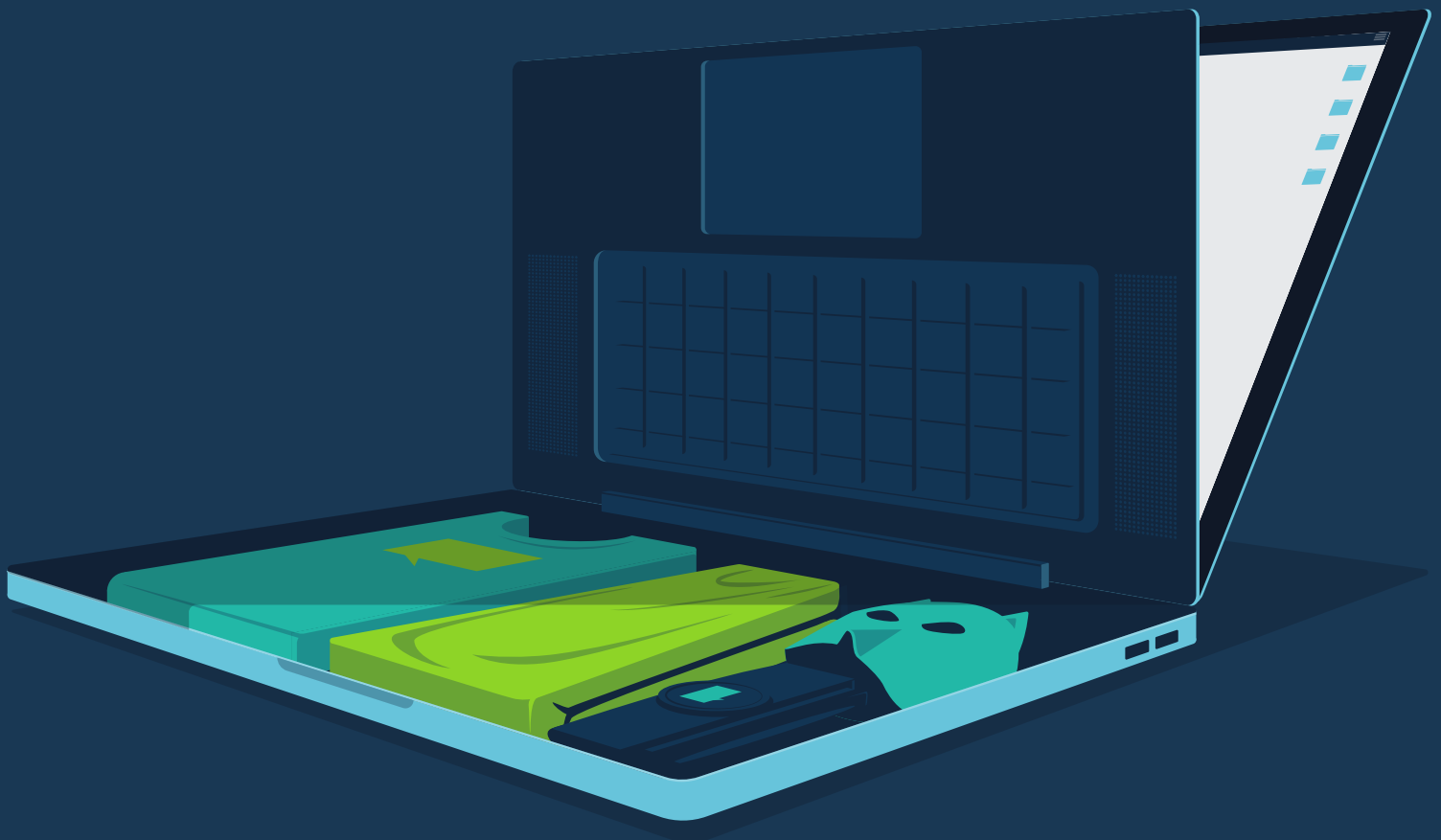
LMS PURCHASE CHECKLIST

Congratulations! You have decided to start your journey towards digital learning transformation. Or perhaps you are looking to purchase a new learning management system (LMS) and want to make sure you get it right. After all, selecting and purchasing the best fitting LMS has a far-reaching impact on your organisation.

The right training programme can bring a plethora of benefits to your company. In fact, effective training has a positive impact on employee engagement, retention, productivity and overall profitability.

But with many different LMS vendors and features available, it might seem like a mammoth task to find the best fitting learning platform for you. Our checklist is a helpful tool for anyone looking for a new LMS. Work your way through the list to identify if your prospective vendor can provide everything you wish your new learning platform to offer!

Let's go!



1. Identify Your Needs

Success starts with a proper strategy. Fail to prepare and prepare to fail. At this stage, you should be working on the blueprint for your project, rallying resources and setting success criteria. Start by selecting your goal:

- Create a high-performance learning culture throughout your organisation.
- Provide a fast and cost-effective way to train and manage your employees.
- Easily create custom courses that can be used and replicated across your company.
- Implement efficient training for your extended enterprise.
- Have a library of vendor and user-generated content that can be used for reference or help.
- Have the option to sell your content or courses via eCommerce integration.
- Other:

2. Research Vendors

After identifying your needs, it's time to start researching vendors. Exploring different vendors helps you to see which ones have the features you target.

- Establish whether you need a cloud-based or a hosted solution and vet vendors accordingly.
- Research different LMS providers and their offering to narrow down options.
- Take advantage of live demos and explore the prospective platforms.
- Establish if you have a shared vision for learning with your vendor of choice. You may face future alignment issues if you're all about engagement and your vendor is all about compliance.
- Ask to get hands on with your chosen learning platform in a sandbox environment.
- Explore if a pilot programme is an option.

3. Prepare Your Timeline

Once you have identified your training needs and researched vendors, you are at the stage to start thinking about costs! Having a set budget in place for training efforts can save you a lot of hassle in the long run.

- Establish the training budget your organisation has agreed to spend on your new LMS.
- Identify the pricing structure of your prospective LMS vendor.

- Ensure you know what is included in the contract and what you have to pay extra for. For instance, inquire about costs of additional functionality, support or modules and development and integration costs.
 - What payment terms are you looking for?
 - Which pricing model would suit you best? For example, an active user model or a fixed price per number of users.

4. Ensure Your LMS has Extensive Admin Tools

So, you've determined your needs and training budget. It's time to ensure that the LMS provides all the useful administrative tools you will need to run the platform efficiently.

User Management

- Find out if you can set roles with different access options.
- Make sure learners can be added, deleted or edited individually or in bigger batches.
- Ensure you can filter user data based on, for example, their job role, team or region.

Reporting

- Explore the reporting feature and how it has been set up.
- Make sure you can generate automated and scheduled reports.
- Make sure you can run reports on assessments and tests and filter results by question.
- Ensure the reporting feature gives you information on all the metrics you want to follow.
- See what format you will get the data.
- Check the format of your data. Are you able to export it to analyse it further in other systems or programmes?

Data Security

- Inquire what data the LMS records.
- Identify where the data is stored and hosted.
- Ask if the data is encrypted.
- Make sure the LMS vendor has completed IT security training.
- Explore what IT security certifications the vendor holds.
- Take time to read the vendor's information security policy.
- Request and read the vendor's GDPR documentation, Backup & Recovery policy, Escalation policy and any other relevant documents.

Integrations

- Identify what integrations are available.
- Make sure the LMS integrates with the software you are already using.
- Inquire if the vendor provides custom integrations and request them if needed.
- Ensure the LMS can pull data from another application or software.

SCORM

- Make sure that the learning platform is SCORM compliant.

Data import/export

- Familiarise yourself with how to export and import data on the LMS.
- Inquire if you can do bulk uploads.
- Find out if learners can export and import data or if it's restricted to administrators.
- Make sure you can export data in the format most convenient for you (e.g. .doc, .xls or .pdf).

5. Make Sure the User Interface is Intuitive

People often focus on features such as user management and course capabilities but forget one of the most important aspects of any software: usability. As such, make sure the UI is simple to use.

- Explore the UI in action. You can do this, for example, while trialling a sandbox environment of the platform.
- Analyse if the learning platform is easy to use. Answering the following questions can help:
 - Is it easy to find the courses you want?
 - Can you search for content with a keyword?
 - Is it easy to enrol on courses?
 - Can learners search for and take courses on their own?
- Consider if learners will require training to pick up the new system.

6. Explore Content Creation and Management

Any content you create on the LMS needs to be well organised and easy to share. As such, at this stage, determine how content creation and management happens on your prospective LMS.

- Trial the content creation process to make sure that it's quick and easy to:
 - Upload or create content or assessments.
 - Create content groups.
 - Find and assign courses for your learners.
 - Add deadlines and due dates to individual content or courses.

- Decide if you would prefer creating content yourself or purchasing off-the-shelf content.
- Find out what content formats the platform supports.
- Inquire if the content is mapped to competencies.
- Determine if you need a content authoring tool to create course content.
 - If yes, ask if the authoring tool is included in the contract or if it costs extra.

7. Explore Options for Customisation

From PR to advertising, everything has to be in sync with your brand image to highlight your core values and principles. And your learning platform is no exception! It should reflect your organisation to better resonate with your learners.

- Make sure you can customise the dashboard and other key areas of the platform to your preference.
- Ensure that you can add your own logo, custom images and banners to reflect your theme or branding.
- Inquire if you will be able to define a custom domain name for the learning solution.
- Determine if you can use custom terminology and messaging to ensure Epic Meaning.
- Distinguish what languages the LMS supports and if it offers instant translations.
- Make sure you can switch off features that you do not need.
- Find out if you can create custom learning pathways for your learners.
- Recognise if the platform offers multi-tenant options if needed.

8. Identify Your Support Options

Getting familiar with new software often takes some time. You will most likely need help at some point in your digital transformation journey. Hence, you should always explore your support options well in advance!

- Start by identifying your support needs and expectations.
- Review your vendor's Service Level Agreement and establish if this is suitable for your organisation.
- Make sure that training and ongoing support are included in the contract.
- Ask for a support person or Customer Success Manager if you are not given one.
- Identify the recommended way for reaching out to the vendor if issues occur.
- Make sure the vendor provides 24/7 support to ensure all issues are responded to and resolved quickly.
- Establish an escalation process if issues are not resolved within an agreed period.

9. Focus on Learner Engagement

It's time to focus on engagement! After all, if your learners are not engaged in their learning journey, they won't keep coming back to your learning platform. As such, make sure your prospective platform includes all the necessary features so you can supercharge learner engagement.

Social Learning

- Make sure the LMS offers a Social Feed for updates and knowledge sharing.
- Ensure the platform offers a way for one-to-one communication (e.g. Live Chat).
- Ensure the software offers a place for group discussion and knowledge sharing (e.g. Clubs or Groups).
- See if the platform can be integrated with different social media channels.

Gamification

- Make sure all learner activity is gamified to boost engagement.
- Identify that the LMS has all key game mechanics and familiarise yourself with these features:
 - Experience Points.
 - Badges.
 - Levels.
 - Leaderboards.
 - Real-world rewards.
- Make sure you can specify which tasks your learners need to complete before they can progress to the next level.
- Ensure you can set recommended and optional content at each level.
- Explore if the platform has push notifications you can use to reinforce training.

Personalisation

- Make sure you can push and pull selected pieces of content to chosen learners.
- Ensure your learners can follow tailored learning pathways that only offer the most relevant and beneficial content.
- Explore if learners are able to build their own profiles and customise elements of their dashboard.

Accessibility

- Ensure the learning is accessible on any device.
- Identify if the software has both an iOS and Android app.
- Make sure the mobile app has a responsive UI that looks and performs to your expectations.
- Establish if all of the gamification and social learning features are also available on the app.

- Explore if learners can access training offline.

10. Have a Vision for the Future

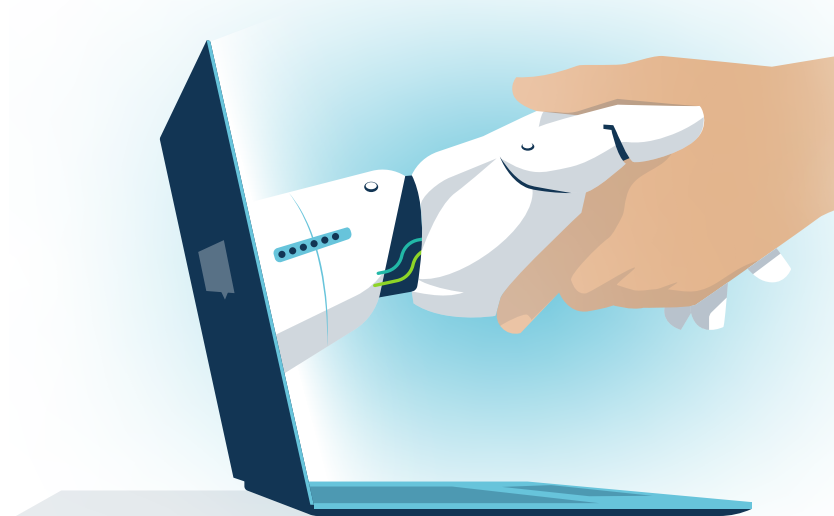
Last but not least, you should make sure that your prospective LMS will serve you in the future too. At this stage, you should ensure that the platform and its features can grow with your training needs.

- Distinguish if the LMS vendor has experience working with clients of all sizes.
- Make sure the learning platform is scalable so that it can grow with your needs.
- Identify if there are any additional charges for adding features later in the contract.
- Ensure the provider is open to your ideas and suggestions.
- Ask to see the product roadmap to identify what future updates or improvements the vendor has planned.

Here at Growth Engineering, we are passionate about online learning and waging war on dull training interventions. We do so with our innovative world-leading online learning solutions, like the Growth Engineering LMS, which ticks all the boxes on this checklist!

This LMS Purchase Checklist brings together our 18-years of expertise in the eLearning industry. We hope that by following the checklist, you have been able to identify if your prospective LMS meets all your training needs!

Make sure to check out our other [downloadable assets](#) to supercharge your training programme.



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