A City & Guilds Group Business

LMS selection toolkit

How to get your key stakeholders engaged and on board

How to use this toolkit

This interactive toolkit has been designed for viewing on-screen. The simple navigational features will help guide you through the PDF.

Chapter 1:
Getting business leaders on board

Chapter headers
Clicking the chapter headers on the right will take you to start of each chapter.

Progress markers
The dots along the bottom of each chapter header indicate where you are within that chapter.

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Getting your business leaders on board

No matter how great the features of an LMS, it can't and won't deliver value in a vacuum.

Selecting the right LMS needs to be guided by the goals of the organization and, more specifically, by the role learning is expected to play in supporting business outcomes.

One of the reasons that getting an LMS right is so tricky is that different leaders across an organization will have very different visions for the role of learning. HR may be most interested in developing skills to meet the future needs of the organization, whereas sales is more focused on onboarding new salespeople to meet a revenue target. If we, as learning professionals, make all of our decisions based on just one of those points of view, there's a good chance the other function will be quite frustrated with the product we choose and how we implement it.

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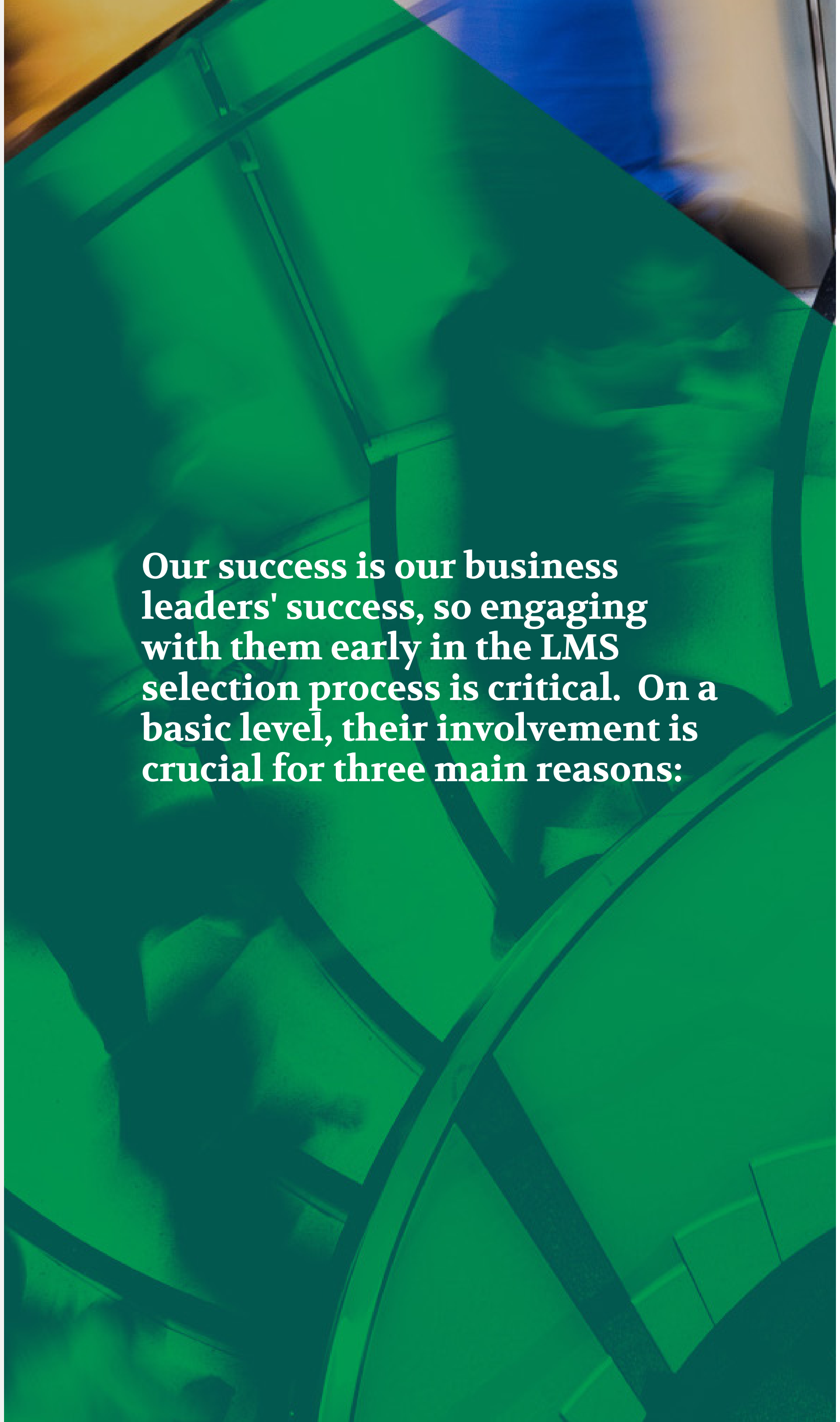

Our success is our business leaders' success, so engaging with them early in the LMS selection process is critical. On a basic level, their involvement is crucial for three main reasons:

Support
You need to build a connection with the stakeholders you are interviewing and get them (and make them feel) involved. Every stakeholder is a part of the project, and you will need their help sooner or later. It may be to mobilize others for a workshop, to provide you with data, or to be a champion of the project in the organization. You can never have too many people on board with the ongoing effort.

Empathy
These are the people whose business you hope to change for the better. To be successful, you need to be able to see, feel, and experience things as they do. By listening to business leaders' frustrations, needs, and hopes, your team will gain the focus and motivation it needs to drive forward. Why? Because your team will better understand the problems your business is trying to solve. These are your customers and their feelings about both the implementation process and ongoing operations will be the number one determinant of perceived success or failure of your solution.

Success criteria
We need to be able to make clear connections between the business goals of these stakeholders, the role of learning in achieving them and most importantly in this case, how the LMS will support the delivery of that learning.

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1 Gathering stakeholder input

Taking the interview approach.

There are a number of tools for gathering stakeholder input and requirements. While taking a survey approach might seem quickest and easiest, it will not gather the depth of responses to really provide you with the rich data you need. Instead, focus on collecting deep detailed insights from a smaller selection of stakeholders. We'd always recommend the best approach to gathering information and requirements is via personal interviews, either on a one to one basis or in small groups.

Interviews are useful tools for gathering in-depth information and are particularly valuable because they allow you to ask follow-up questions of interviewees when you need clarification about a particular response. However, it is easy to ask leading questions in an interview format. Our guide below will help you get the most valuable information from your interviews.

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Preparing for your interviews

The first step is to create a list of potential interviewees. Ideally you cover every department that will significantly use the LMS. Stakeholder interviews can have a bit of a make or break effect on your project so make sure to prepare.

1.
Before going into a stakeholder interview, know as much as you can about their function and goals. Ask if they'll share their department goals ahead of time, review any provided documents and talk to peers in your department who regularly interact with them.

2.
Send a project brief and copy of the questions you intend to ask well before the scheduled interview.

3.
Let them know what you envision as their role in the project, and what some of the likely next step will be going forward, for example, providing access to other people in their department.

Hi Steve,

Thanks for agreeing to a stakeholder interview for the LMS project.

Before we catch up, it would be great for us to prepare a little for how we'll structure the session.

Could you share with me any information, documents or access you think would be useful in helping us understand how your team uses the current LMS, what your challenges are, and your needs?

Look forward to catching up!

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3 Structuring the interview

To give the conversation some structure, we suggest breaking it into six sections. Your agenda could look like this:

1. Introduction (1 min)
Introduce yourself and why you are here. Make it clear that the conversation will be treated confidentially and that there are no right or wrong answers.

2. In their own words (10 min)
Let them explain in their words what their department does, what their goals are, what they have identified as potential blockers or barriers to meeting these goals, what initiatives they have underway to address them, and how they will measure success. Aim to get a sense of their priorities and ambition.

3. About the project (5 min)
This is where you should share your plan for selecting a new LMS and putting together an implementation and operations plan.

Tip:

Three categories of department goals to look for include:

- Improving performance
- Keeping the team's skills and knowledge current
- Talent retention/preparing for the future

Questions:

- You mentioned xxxx, yyyy and zzzz as your department's goals. Have you thought about what role learning can or should play in achieving those goals?
- How would you know if learning is adding value or working for your department?
- If there were no constraints, what would the ideal learning solutions look like that help you meet your goals?
- Considering the above, what would you anticipate being blockers or barriers to delivering these learning solutions with our organization's current structure and technology?
- Who on your team is involved in the design and delivery of learning solutions?
- What concerns do you have (or have others shared) about the way learning is currently delivered in the organization?
- What's the best learning experience you can recall? What was it about the experience that made it so exceptional?
- Who else on your team do you suggest we speak with?

4. Detailed questions and insight (45 minutes)

You'll probably have your own questions in mind but make sure you stay flexible and follow the interviewee's lead. Listen, ask follow-up questions, confirm for understanding and just generally be curious about your partner's side of the business. You'll likely be pleasantly surprised by how positive a response you get by showing genuine interest in their world. To the left is a list of questions you may want to consider.

5. Summarize (5 min)

Make sure you to take the time to confirm your understanding. Ask for a couple of minutes to review your notes and then summarize the key take-aways from your conversation. Give the interviewee the opportunity to correct or clarify anything you may have misheard or misinterpreted.

6. Follow-ups and wrap up (5 min)

Before you end the interview, promise to send detailed notes and a summary of the conversation. Also confirm the list of other people in their organization with whom you plan to speak. Finally, thank them for their time.

4 After the interview

After the interview, review your notes and send a follow up within a couple of days that as a minimum includes:

1. Summary of goals
2. Role learning (will) plays in achieving their goals
3. Must-haves they shared for a "good" learning experience
4. Evidence, e.g. LMS data, you will plan to offer to track against their goals
5. Any open questions

Ask the interviewee to confirm that what you captured is correct and to provide comments or needed input as appropriate. Finally, let them know how you will keep them involved going forward, e.g. sharing your strategy, asking for additional input, etc…

5 Pulling it all together

Creating a business canvas.

A key part of our promise to you is that we will set you up for success and put your business first.

At Kineo, we use our business canvas tool to capture your high-level key business needs and goals. This will then inform all our conversations with you both throughout implementation and afterwards, in health checks and account management conversations.

"Not only has our learner feedback got better since the launch, but the number of learner support queries has also gone down."

Indre Dragunaite,
Head of Learning Technologies, IPA

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Engaging your administrators and instructors

The second group of stakeholders who will drive your LMS strategy when it's up and running are your administrators and instructors.

In a very small organization, your instructors and administrators may only represent a handful of people, but in a mid-size or large organization, this group can represent hundreds of people. These are going to be your heavy users of the new system so understanding their needs and having a clear plan on how you will respond to them will be critical to your success.

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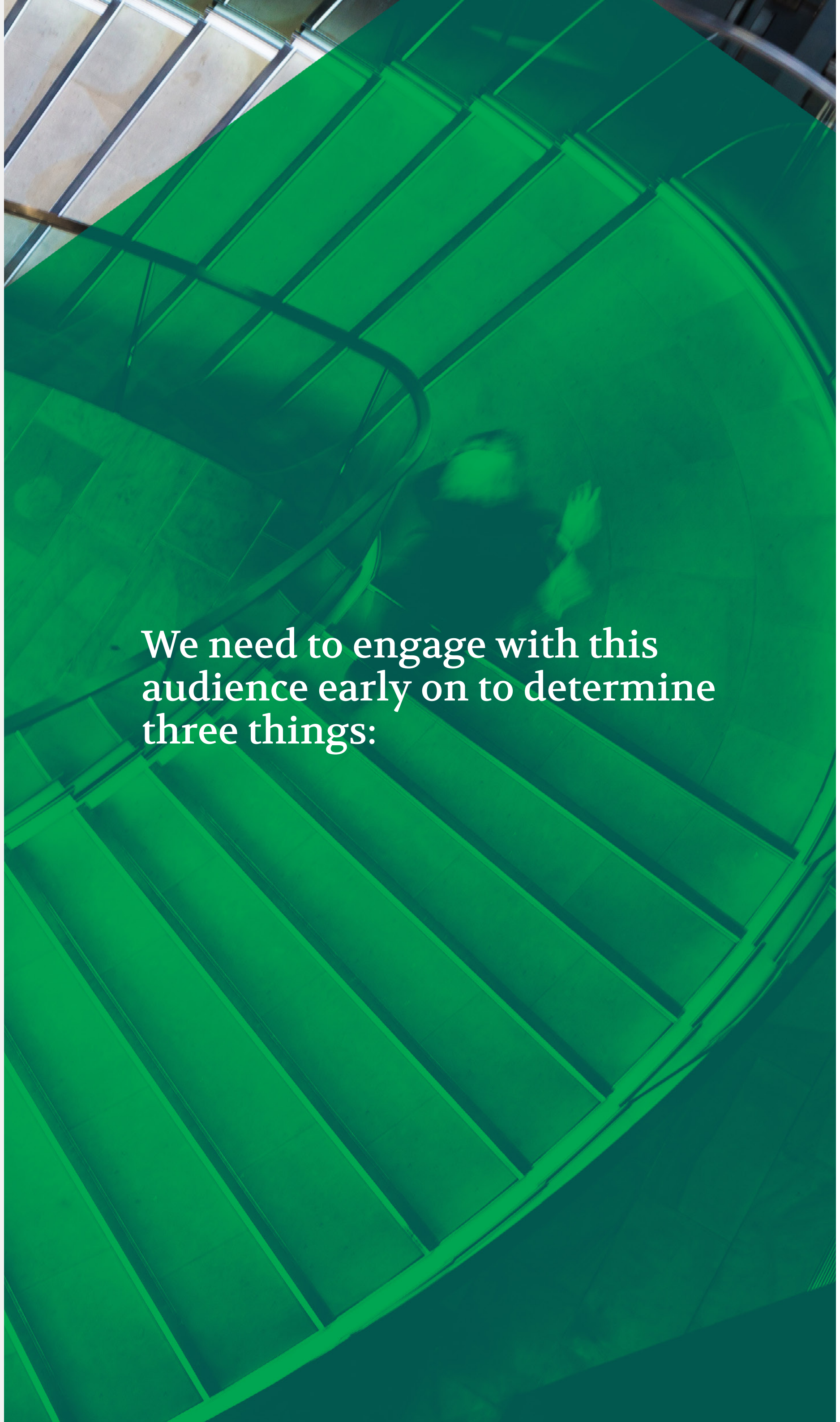

Roles & responsibilities

The ongoing success of your LMS will require a well thought out organizational structure. The organizational structure will determine who does what in the LMS to achieve the goals of the organization. We need first to understand how these stakeholders support their business, and what the business expects of them, e.g. administration, reporting, course creating, with a lens toward what they need from the LMS to do that job.

Permissions

Most LMS' have some level of configurability for roles and responsibilities or permissions. You have choices. You can lock people down to only see and consume specific pieces of learning or you can give them the keys to the kingdom. The right answer for your organization is probably a mix of both of the above and everywhere in between. Determining what capabilities these stakeholders will use in their role and subsequently deciding if you will empower them to do it themselves or provide support to do it for them will be important when defining your operational model.

Process and governance

The organizational structure and the decision to enable or train will also determine the relationship between the LMS team and these stakeholders and inform what needs to be communicated and how. For example, for tasks that are managed within your core team, you'll need to document a process for others to follow whereas for tasks that are delegated out into the organization, you'll need to train the appropriate individuals and communicate standards of practice.

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1 Create manageable teams

In a large and complex organization, your administrators and instructors can easily number in the hundreds and it's probably prohibitive to try to meet individually with everyone.

One strategy to consider with this group is to segment them into smaller subsets so you can engage with 1-2 representatives from each group. There are many ways to group people, but one approach is to use a simple matrix with job roles on one axis and departments on the other axis.

Ultimately, there's no right or wrong way to do this but finding a way to group these stakeholders that reflects your organization is an essential step that will make reaching and engaging with them more manageable.

	Human Resources	Sales	Compliance	Customer Education	Information Technology	Etc...
Instructional Designer						
Instructor						

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2 Meet your power users

It's time to assess their needs.

For each group, you'll want to share a little background about the project and ask them to provide an overview of their responsibilities and goals. Once you've shared some background and and context, it's time to dig into some questions. Please find below some sample questions you could use with each of the functional groups you may be working with.

Instructional Designers

- How many learning solutions are you responsible for designing and deploying each year?
- How frequently are they rolled out?
- How similar are the designs from program to program?
- What is your comfort / interest level in working with the LMS?
- Does the current LMS or any of the processes associated with getting content deployed present any barriers or blockers to you doing your best work?
- What would an LMS be able to do in your perfect world?

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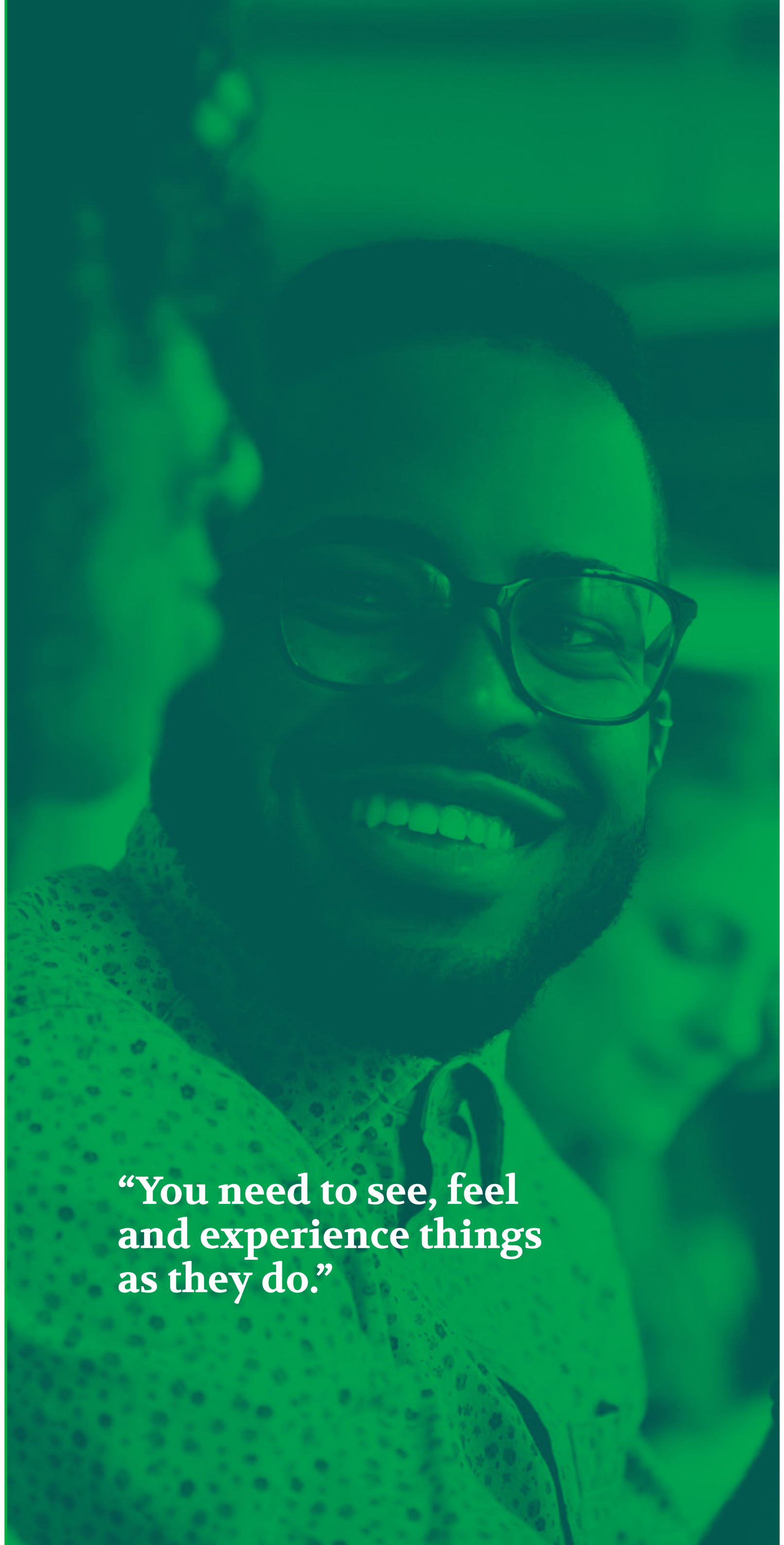

Ask them to think about 2-3 recent learning programs they designed and probe for the following?

- Who was the audience?
- How did they learn about the program?
- What were the set of learning experiences?
- For which of these experiences did they use the LMS?
- What data did they collect about the users in the program and how did they use it?
- How was learning deployed?
- What was their role in deploying it?
- What worked well?
- What would they like to see improve in the future?

Instructors

- How many classes or programs do you lead in a month? A year?
- How frequently are classes held?
- How are people enrolled in courses? Through the current LMS? Another way?
- What is your comfort / interest level in working with the LMS?
- What information do you collect about / from attendees in a typical class?
- If you could design a new LMS with no constraints what would it do… enrollment, pre-class, during class, after class, data provided / tracked, etc?
- Does the current LMS or any of the processes associated with it present any barriers or blockers to you doing your best work?

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Weighing-up centralized vs decentralized support

Formulate a plan for supporting your users effectively.

Once you've identified these groups and taken time to understand their goals, roles, responsibilities, and constraints, you need to formulate a plan on how to best support them.

One of the main decisions is what your relationship will be with this group of users going forward. You have two options - either a centralized approach where you support their needs using a services model or a decentralized approach where you delegate responsibility to them and provide access to a self-service system.

How decentralized should decision making be? It depends on your goals.

When it is important to have...	Responsiveness	Reliability	Efficiency	Perennity
...it is usually advantageous to veer towards...	Decentralization	Centralization	Centralization	Centralization
...as that solution enables and stimulates...	Immediacy	Compliance	Syndication	Detachment

Source: Herman Vantrappen and Fredric Wirtz

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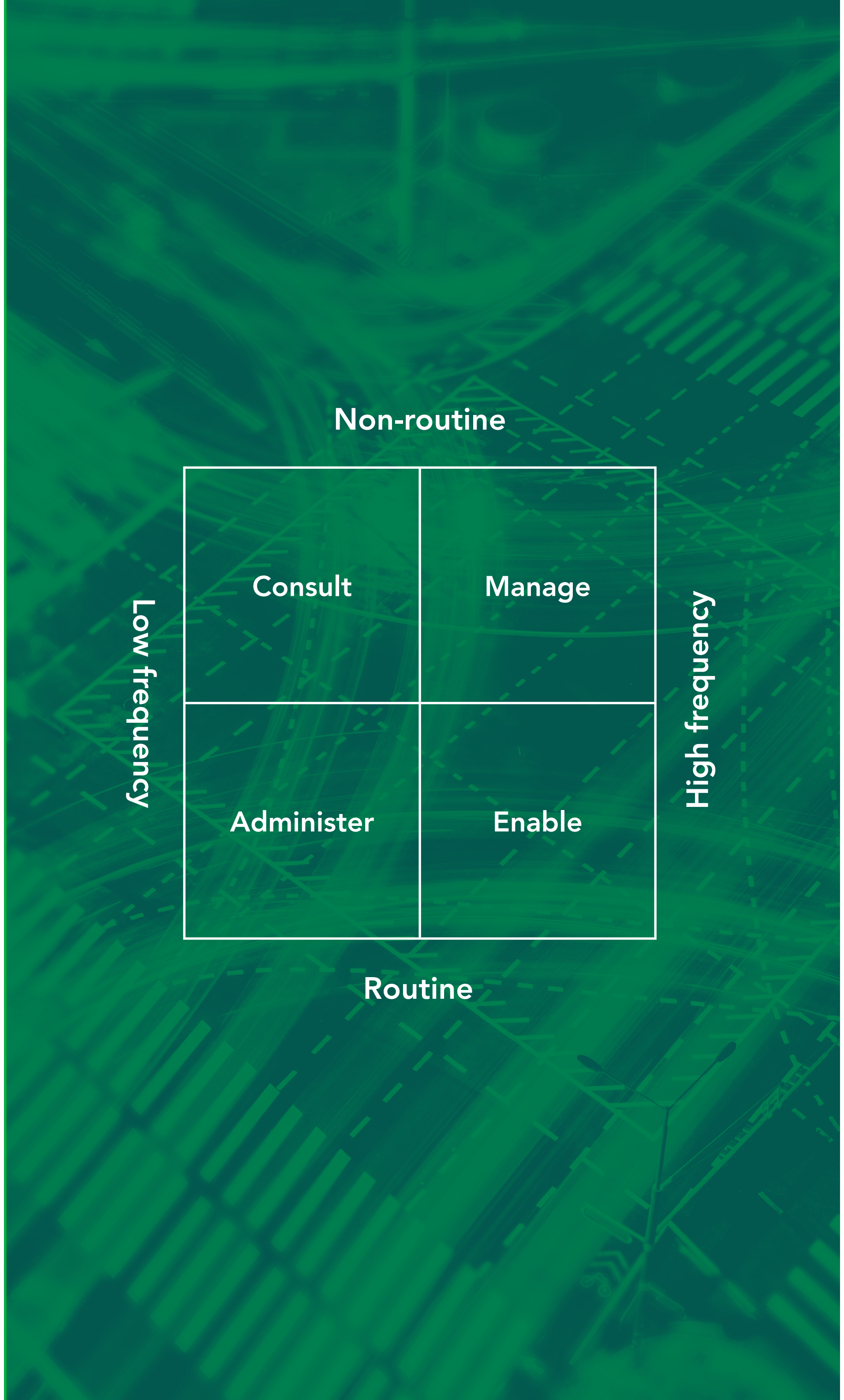

We've developed a simple framework that helps to inform which support model would be best for each specific group. This framework considers two aspects. First we look at the predictability and consistency of the group's needs. Routine needs have a similar pattern over time with the same approach used time and time again whereas non-routine needs tend to each require a unique solution. Secondly, we consider the frequency of the group's needs.

While there will always be exceptions, plotting these considerations in the 2x2 will start to provide a roadmap for how to allocate resources and what level of support your team should provide. Each quadrant indicates a different approach:

Consult

These needs may be infrequent, but they are non-routine. Think of these as one-off projects and have a team available to provide a high-touch experience to guide your administrators and instructors along.

Manage

These are your high-volume, complex users. You are likely best off dedicating some portion of resource to make certain these “customers” are well served and make the best use the technology.

Administer

These infrequent, straight-forward needs can probably be handled by an Administrator and don’t need to take up a lot of bandwidth of your team.

Enable

While these customers are high-volume, their needs are consistent over time. These are good candidates to invest heavily in upfront to train, making sure they have appropriate permissions. Do this well at the beginning and this group should become largely self-sufficient.

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4 Define your service and training model

Articulate your specific services.

Now that you've identified the groups you need to support, developed an understanding of their needs and taken a stab at defining your relationship, your next step is to articulate the specific services you're going to provide these teams with under your operating model. Once you have accomplished all this, you will be able to determine how big a team you'll need to support the LMS after implementation. It will also give you a roadmap to determine what gaps exist in terms of process, standards and governance.

Defining the support models or services you plan to offer the organization will allow you to then map those to each of your stakeholder groups and set expectations. Think of this as establishing a service level agreement with them. Be ready to negotiate, but now you're doing it from a position of strength. If they want more, then you may need to ask for more in return.

Below is a list of some of the kinds of support you may want to consider offering:

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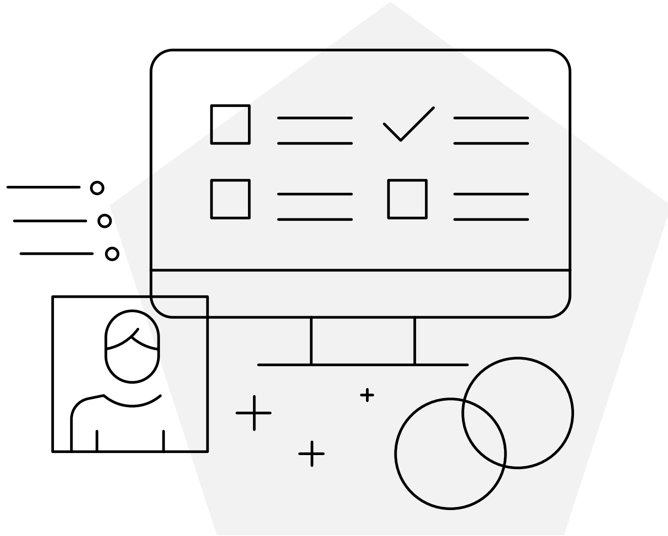
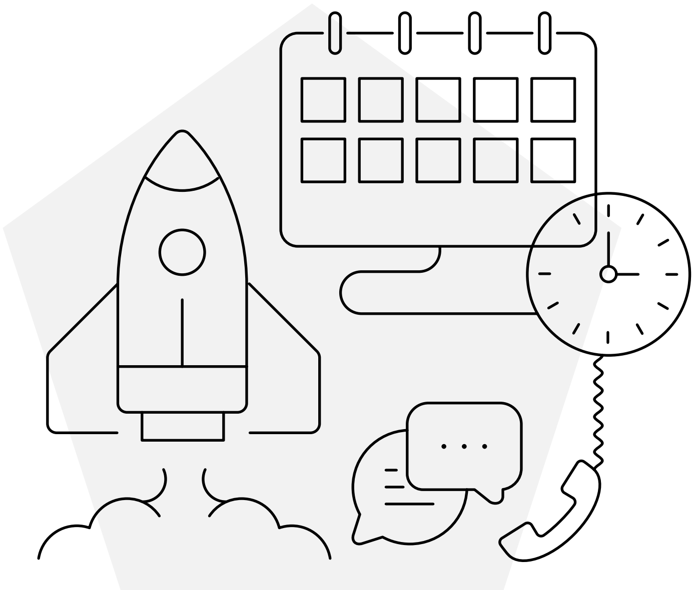
Blended / learning design support

Many LMS have features like forums, surveys, assignments, and more that can turn a straight-forward piece of elearning or an ILT class into a rich learning experience. Consider offering support during the solution design process so your users get the most out of the LMS. If you don't plan to provide support for design, make sure this is part of your training resources. Too many LMS become "dumb" launch pads for simple instructor-led or elearning courses and the most interesting social and collaborative features get ignored.



LMS administration

You may offer to do some or all of the administration of the LMS as a service. This might include adding users, creating audiences and assignments, building courses and course-activities, and more. Be explicit about what you will and won't do and what you expect the stakeholder to take on themselves – then train them!



Training

Expect to do a lot of training and don't forget about onboarding new stakeholders. Consider putting high-use training in elearning and don't forget about job aids.

Pilot testing

One way to add significant value back to the business is to facilitate gathering feedback on courses. You can offer to organize pilots and to help interpret and act on your findings.

Help desk

In a larger organization, you may consider setting up a help desk so stakeholders have on-demand support as-and-when they need it.

Office hours

A more manageable way to provide help to stakeholders is to learn from the example of university professors who make help available on a regular basis. For example, we have found it helpful to schedule sessions for an hour with a focused topic being covered in the first 15 minutes to get people engaged, then leaving the remaining time for open Q&A.

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5 Be ready to change

Turn detractors into advocates.

Don’t forget to schedule a regular check-in to make sure your users stay on track. Don't beat yourself up over trying to get this perfect the first time. What’s important is that you have a model you can share back out with different groups. You can expect some of your users to be thrilled with your proposed approach, while others won’t be. Plan to make changes based on feedback and preferences - just don't forget to factor this in when deciding how big a team you need, your budget and how long an implementation might take.

For many organizations, their LMS is a rallying point for discontent. If this is the challenge you face, don’t try to solve every problem. Instead, focus on a manageable set of key stakeholders to resolve their issues and, subsequently, change their mindset. This "change from the middle” approach can help turn potential detractors into some of your strongest advocates.

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CHAPTER 3

Creating your user stories for a better UX

One long-standing tradition of the LMS selection process is a list of features. But it isn't the smartest place to start.

Typically, when embarking on the LMS selection process, an organization will draft a long list of features then ask potential partners to respond with whether or not they have them. This approach can work for simple purchases, but for a complex technology like an LMS there can be hundreds of ways to do any given thing, some better, some worse. So while a list of features is inevitable, developing a set of user scenarios first will improve your selection process.

A user scenario is an end-to-end description of a user accomplishing an action or goal using the LMS. It documents the steps they take and can then be used as a base to flesh out other requirements. The advantages of user scenarios include:

- Focus to identify essential features and requirements that your LMS must have.
- A clear context for features, so you can more accurately evaluate how well a potential LMS will meet your need.
- Highlight integrations, feeds and other dependencies.
- Help prioritizing features. Feature creep is a very real thing. It’s easy to get caught up in all the bells and whistles different LMS offer, but which ones are worth their investment?

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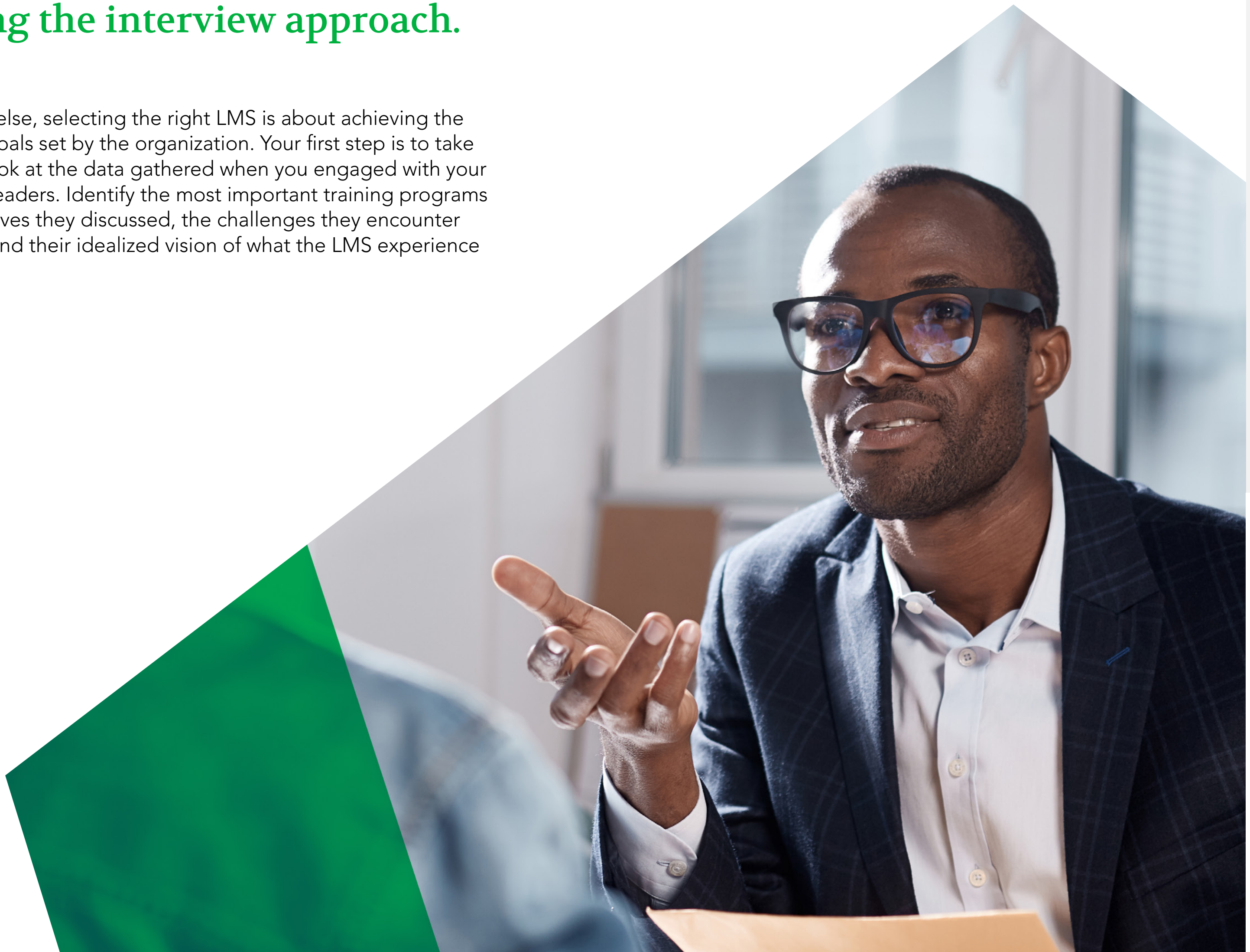
1 Pick a need

Taking the interview approach.

Above all else, selecting the right LMS is about achieving the learning goals set by the organization. Your first step is to take a closer look at the data gathered when you engaged with your business leaders. Identify the most important training programs and initiatives they discussed, the challenges they encounter currently and their idealized vision of what the LMS experience should be.



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2 Create a persona

Bring your learners to life and make their issues more tangible.

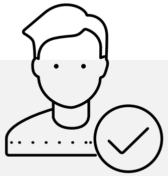
A persona is a simple tool you can use to capture key user voices and make them accessible and easy to refer to when you're considering how a program will work. They are a representation of the audiences identified by business leaders when you interviewed them.

While every user of your system is unique, they can usefully be grouped into these more general personas based on needs and behavior to provide insight into how they might engage with the LMS and get the most out of it. You could decide to build three, five or even seven different personas – there's no limit but make sure you don't try and get too granular whilst still defining the differences between each group. This information will give you a general snapshot of your learners.

Whenever you develop a user scenario for a program, make sure you then match a persona profile to it that embodies the characteristics of the intended learner. Take some time to also think about the learners in the context of this program or curriculum by asking:

- Why will they go through this program?
- What will they want from the program?
- What motivates them? Are they intrinsically or extrinsically motivated?

Finally, assign each persona a name and even a photo or drawing, as this will make it easy for existing and new project team members to reference each audience when assessing how well the project is meeting needs and requirements.



Each profile might include:

- Who they are: e.g., gender, age range, job, and location
- Background: e.g., relevant experience, education level, how they like to work, etc.
- How they spend their day (on the road, at their desk?)
- Technology they access on a daily basis
- Their attitude towards training or education in general

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3 Document steps of the program

Get your markers and sticky notes out - it's time to make a list.

Next step is to list out each activity and experience that makes up the program from the persona's perspective.

- How does their information get in the LMS?
- How do they learn about the program?
- What do they see when they log in to the LMS for the first time? What about subsequent times?
- What are the activities and resources that make up the program?
- What other systems will they interact with during the program? How does information get shared between systems?
- What determines completion?

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4 Flesh out requirements

The final step is to take a holistic view of the program steps to identify all the associated requirements.

1. Detail out what happens in each step of the program.
2. List the features and functionality you expect the LMS to provide to support the experience.
3. Call out any integrations or interfaces you need to send or receive data or to leverage existing systems that make up part of the learning experience.
4. Think about who needs to know what's happening in the program - the learner, stakeholders, managers, function heads, trainers, administrators, and coaches. What do they need to know? Do you have preferences on how the information is presented?
5. Account for other parties that need to take actions. What do they need to know? How will they be notified? How will they access this information?

Step	Features	Integrations	Reports	Notifications
• What do they do? • What do they see? • What data is captured?	• What features are needed to create the experience?	• Are any other systems involved? • Is data sent or received?	• What data is tracked? • Who needs to see it? • How does it need to be sorted / filtered?	• What comms does the learner need to receive? • What comms do others need to receive? • What are the triggers?

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Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

Whatever your business challenge, we will partner with you every step of the way to find the learning solution that fits best – and delivers results.

So, how can we help you?
Get in touch about your digital learning challenges.

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