

# 5-Step Model for Selecting a Learning Management System (LMS)

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I recently participated in a panel where the question was asked “how long does it take to work through the LMS selection process?” The first consultant, who I greatly admire, and with a vast amount of experience in helping companies work through the LMS selection process quickly replied that in his experience, the process usually takes about **one year** to “do it right.” He went on to explain that LMS systems and process can be very complex and that there are some tough decisions to be made. TRUE!

However, I started feeling a bit uneasy, because for the last 9 years of specializing in LMS selection and tutoring services that walk through the entire process from beginning to end in about **2 1/2 months**; I began to wonder what is the big difference between his process and mine. The general model looked somewhat similar, but there was one major difference. In my model, I have learned the value of moving the demo upfront, rather than waiting until after the RFP. It makes all the difference in the world.

Here is the 5-step model I strongly recommend (whether someone uses our services or not). I have tweaked and refined this model for many years now and it works.

**Step 1: Short Listing.** With over 140 LMS’s on the market, you will spend way too much time chasing down possible leads for the project unless you narrow the field right up front. The biggest mistake made during this phase is creating massive feature and functions list and then starting to weigh them against every system available. I have seen such documents with feature numbering in the thousands. In fact, I just saw a recent document with statements such as “The system shall allow a learner to log on to the learning environment.” Yikes. Have you ever heard of an LMS that doesn’t already do this? The process for short listing is so much more straightforward than all that. Just come up with some highly differentiating characteristics of your learning infrastructure or project. Make a small list of such critical needs. Our team works to keep the number to 10-20 items maximum. For example, one recent client wanted to build a customer-facing learning environment where their customers could self register and set up a learning account and their information would also set up a customer profile in Salesforce CRM. So, the critical needs list included (1) Looking for LMS vendors with experience working with Salesforce, (2) LMS must have e-commerce capability, and (3) potential users must be able to browse the LMS catalog before they create a profile/account. With these few items, the list was narrowed very quickly. Overall, I like to try to narrow the list to somewhere between 3 to 5 systems max during this phase.

Short listing is also where the Brandon Hall Research, LMS Knowledgebase comes in extremely handy. It has all the tools you need to quickly narrow your list.

**Step 2: Use Cases.** Use cases are very different than features/functions. In fact, when I'm meeting with a stakeholder group for the first time; whenever someone throws out a feature, I make them tell me a story about how they plan to use that feature from beginning to end. Writing down the story is the use case. When the use case document is complete, it is a bigger story telling exactly how the LMS will be used. The document is written as a script for the 3 to 5 vendors selected during the short list phase. The purpose is that you want the vendor to come in and show how they might fit into this storyline. Consider how this is so fundamentally different than a typical LMS solution demo you might get if such a document did not exist. I generally try to keep use case documents down to around 10 pages in length. The idea is that the vendor should be able to tell the story in apx. 4 hours (length of the demo). I also refer to this part of the process as the "speed dating" phase. Spending 4 hours with each of the vendors quickly lets you know if they are a match or not.

**Step 3: Scripted Vendor Demos.** I put the demo much sooner in the process than traditional models of due diligence. There are many reasons to do this: (1) it helps members of the stakeholder team solidify in their common vision by seeing 3 to 5 different approaches to their common needs, (2) the vendor is much more focused on client needs from the very beginning (no dance of formality), (3) vendors walk away from the experience much better equipped to write a proposal/bid for the project, (4) the stakeholder team is much better prepared to read proposals (visualizing systems that they've already seen in action, and (5) it exposes issues such as "ease of use," "visual appeal" and other subjective measures right up front. Something that is hard to capture through the RFP/Proposal process.

**Step 4: RFP Development.** By moving the demo ahead of the RFP, writing the RFP just became about 10 times easier. You write the RFP to the use cases and storyline. Certainly you can add detail to the story, but this is so much better than pasting in an Excel spreadsheet with 500 features all ranked from "must have," to "nice to have" to "future need." The vendors, instead of pencil whipping your included features list ("yes, we do that") will tell you how they fit in your story and also what it will cost to reach that goal. So much better!

**Step 5: Evaluate Proposals.** When the proposals come in, you can go through the traditional process of grading their responses, but with the demo occurring prior to RFP, you have a very good idea about what they mean when they saw "yes, we have e-commerce," because you've actually seen their model of e-commerce and you have an opinion about how well it will work into your processes.

The idea is to use the five steps to narrow the list to one (or perhaps two systems) before spending valuable time going extremely deep into the system, through sandbox testing, extensive discussions with the vendor, negotiations, etc.

Back to the original question. How does this all boil down into 2 1/2 months. Here's how:

**Week 1:**

- Summit meeting with entire stakeholder team (collect information for both short list and use cases)

**Week 2:**

- Develop short list criteria (10-20 items) and Use Cases (apx. 10 pages)

**Week 3:**

- Schedule vendor demos (usually schedule for 2 weeks out)
- Circulate documents for feedback and final approval

**Week 4:**

- *[wait for vendor demos]*
- Start work on RFP

**Week 5:**

- Vendor demos
- Grading demo evaluations
- RFP out for feedback and review

**Week 6:**

- Send RFP to vendors

**Week 7:**

- *[waiting for responses]*

**Week 8:**

- *[waiting for responses]*

**Week 9:**

- Read and Grade Proposal

**Week 10:**

- Final meeting to pick a system (using demo evals and proposal evals)

How long does it take to select an LMS?

Answer = 2 1/2 months

