

GEARING UP FOR CHANGE

LMS Replacement Guide

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Mission Critical



As we approach the end of the second decade of the 21st century, most organizations have a learning management system in place. In fact, LMSs have become mission critical in many organizations. But why?

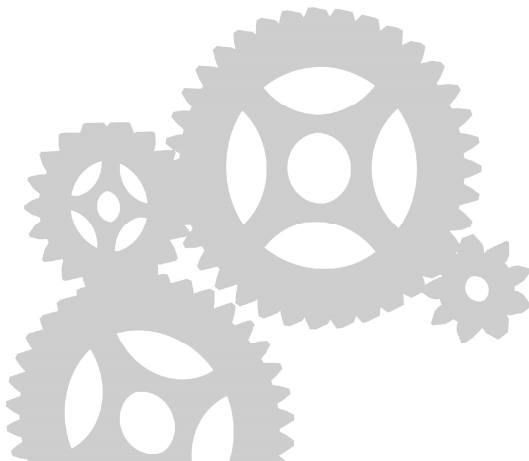
Today's business environment is an increasingly complex maze of rules and regulations. Legislation and standards are in place or being proposed for almost all aspects of business and industry. Throughout the world, regulations govern the manufacturing and handling of a variety of products for health and safety reasons. Other policies are designed to provide privacy and security or prevent fraud. These regulations are administered by government agencies, international organizations and industry associations, and compliance is sometimes voluntary but often mandatory.

A compliance survey carried out by the Brandon Hall Group a few years ago showed that demonstrating learning compliance to an external agency was important for 90% of respondents. About 50% of all the organizations surveyed said it was actually critically important to their business. And in specific industries, the number

that said it was critical was much higher — more than 70% for biotech, healthcare, transportation and certain types of manufacturing.

High consequence is a term that has been used to describe those industries where compliance is essential. High consequence equals highly regulated, and for good reason. As the name suggests, errors at these organizations have severe consequences. For high consequence organizations, an LMS may not be optional. They may need an LMS to help them prove compliance. In the military and in space travel, obvious high consequence environments, this is called ‘mission critical.’

Although a learning management system is not involved in the manufacture of products normally covered by legislation or standards, it may manage the training of those who are. These systems often play an important role in the training and certification of workers who operate equipment or carry out processes that are regulated. An LMS may therefore carry records



related to courses and learning activities that are critical to compliance.

Even if an organization isn't as highly regulated as some of the above, an LMS can still be mission critical. Competition for talent has become fierce. Acquiring and keeping the best talent is one of the biggest competitive advantages in today's world. In that kind of marketplace, an LMS plays a key role by helping the organization ensure that its workers are not only skilled but up to date on necessary certifications, aware of the latest developments and more.

For most medium and large organizations, whether private or public, an LMS is considered necessary today and has become part of the essential suite of enterprise systems.

Reasons Organizations Scrap Their LMS



Dissatisfaction in the Marketplace

Learning technology is now considered mature. Having had its infancy in the early 1990s, two-and-half decades later, it's considered mission critical as noted in the previous chapter. And yet...

A recent report from Brandon-Hall.com summarized the findings of one of the analyst's recent learning technology studies. The survey received more than 300 validated responses from 31 industries and 35 countries, including the U.S., Canada, England, France, Germany, India, Turkey, Australia, and New Zealand.

The top five findings were:

1. Social and mobile technologies were shown to be the biggest priorities.
2. User experience was listed as critical.
3. Integration is becoming more important.
4. Learning technology satisfaction is lagging.
5. Key performance indicators show significant improvement after technology implementation.

It's not surprising that social media, mobile technologies and user experience are big priorities. They are the latest trends and are in demand by users. The reality is that today's workforce is more

demanding—learners want content pushed out to anywhere at any time.

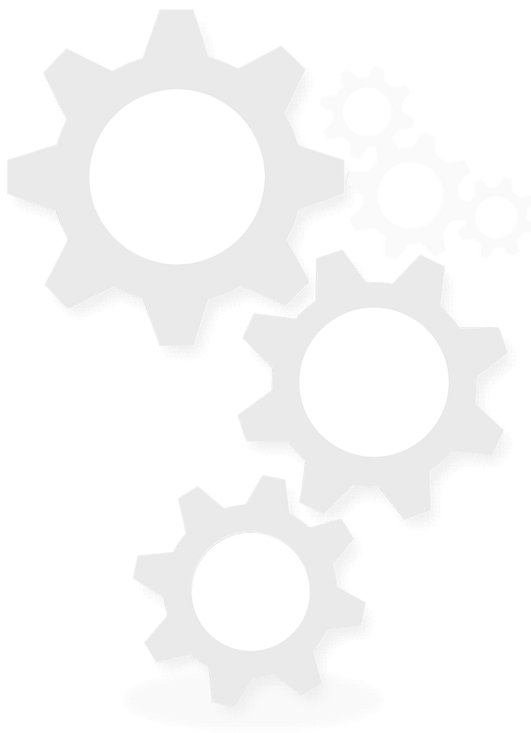
However, another study showed that nearly 70 percent of corporate learning is still instructor-led. Much of that is now done virtually rather than in-person, but according to that study, organizations still rely on instructor-led training for the majority of their training. While learners often want digital content, the fact is that ILT is often the best choice for many types of learning. As a result, a blended approach of instructor-led training and e-learning continues to be the ideal solution. Yet most innovations in learning management systems have nothing to do with ILT. And in fact, many software vendors have completely removed (or never offered) the ability to manage ILT from their LMSs.

Integration is becoming more important because it is becoming less available. But as many software companies jump on the cloud or off-the-shelf bandwagons, integration ability can be lost. Turn-key cloud applications that let customers set up instantly may be unable to easily integrate with existing enterprise systems. Many interfaces

look good, but what's under the hood doesn't fulfill the learning organization's needs. The idea is nice but is not sustainable over time. It's no wonder learning technology satisfaction is lagging.

Why Replace an Enterprise System?

Below are the main reasons why organizations consider moving from one LMS to another. And this list isn't just for learning management systems. They are the typical reasons for discarding any enterprise system.



1) Insufficient Functionality

Organizations that made software purchasing decisions based on price rather than functionality may find out fairly quickly that the system can't meet their needs – and never will. Or maybe the organization has evolved but the software hasn't – or it hasn't evolved in the same direction. As a result, you find yourself with new or changed activities that you can't manage properly with the

existing software. Either way, the relationship between the available functionality and the organization's needs is failing.

2) Unsatisfactory Reporting

Is your current system providing you with the financial analysis you need for budgeting and planning as well as showing you which activities are having the most impact? If your current system lacks the necessary reporting capability, you'll probably want to move on to software that does. Data has become king. There's a good reason we have the saying "Who masters the data rules the world." Even if the functionality that you require is available, if you can't get the information you need out when and how you need it, then the system isn't working for you.

3) Inadequate Vendor Support

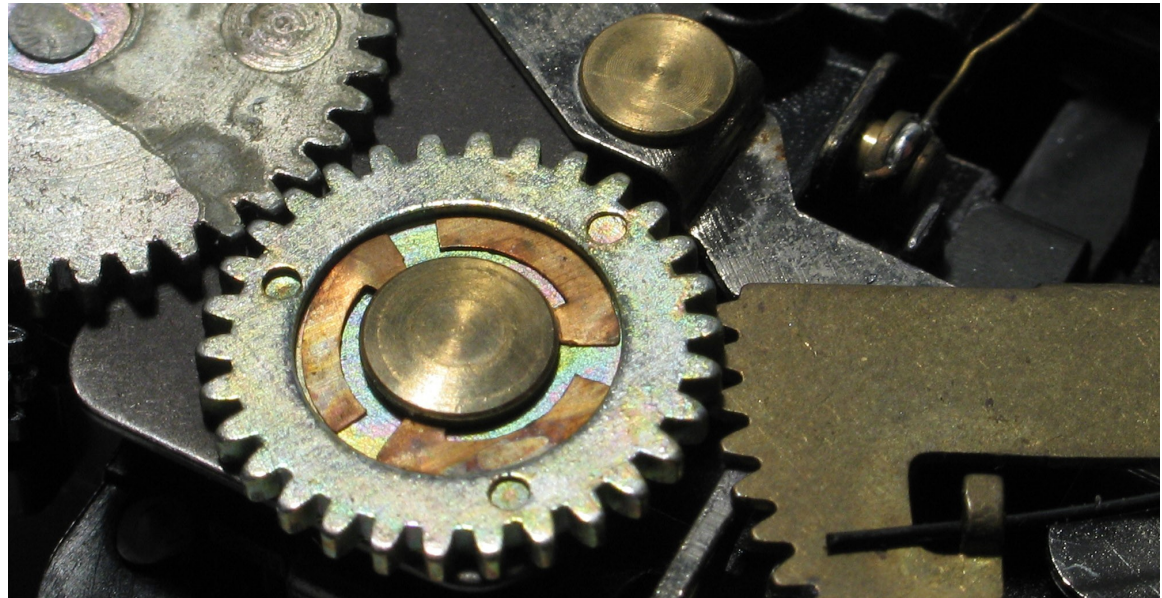
Did you discover that after the purchase was completed and the vendor had your money, they seemed to completely disappear from the face of the earth? Emails and phone calls go unanswered. Issues are never resolved. In some cases, it's simply that the vendor has

focused all their resources on sales and has neglected customer support. In other cases, a lack of vendor support can also be a result of mergers or acquisitions. The vendor you originally purchased from has merged with another vendor or was purchased outright. You were promised that your software would be maintained and that your support would not suffer. But later, you find the new vendor wants you to ‘migrate’ to a different product. To push you along, they have scaled back (or ceased to offer) support, and you are left hanging.

4) Financial Unsustainability

Over time you’ve found that the price to maintain the current system is more than you were expecting or that the costs have grown substantially since your initial purchase. Possibly you were misled about what was included and now you find that modules or services ordered ‘a la carte’ are eating up your budget. Maybe you are a victim of a vendor merger or acquisition as mentioned above and now are being pushed to migrate to a new (and much more expensive) product. Many systems turn out to be unsustainable due to unexpected costs.

Do You Really Need to Replace?



Maybe all four of the reasons for replacing an LMS listed in the previous chapter apply to your organization. But before you run out and replace your LMS, take some time to objectively evaluate your

existing system. Is it broken or just a little rusty? Ask yourself the following three questions and answer as impartially as you can.

Is the issue the LMS or is it something else?

Is the LMS truly not able to meet your needs or is the issue outdated learning or internal processes? Are there staffing or procedural issues interfering with the management of learning within the organization that have nothing to do with the LMS software?

Maybe you've had a turnover of staff and the current administrators have never been formally trained to utilize the LMS software. In that case, training provided by the vendor may solve the problems you are having with the system.

Is it possible that the issue is with learners not taking advantage of what's offered to them via your LMS? Could it be that line managers aren't promoting your learning programs? It might also be an issue of learners not understanding how learning & development within the organization helps them and the organization meet specific

goals. A review of internal processes or even a learning promotional campaign might be necessary before making a decision about software.

What's wrong with the LMS?

If you've eliminated organizational or procedural issues, then it's time to do a review of the LMS and its functionality to find out why the software isn't working for you anymore. Maybe it never did work for you the way you wanted, but you've 'made do' and now you can't. If it did work for you at one time, what has changed? Has your organization changed? Has your industry changed? Has technology changed? Have your needs evolved in one direction while the LMS evolved in another (or not at all)?

You may need to have an appraisal done in conjunction with your current LMS vendor to determine how and why your needs are not being met, which would lead to the third question you should ask.

Have you maximized your current system?

If the second question resulted in you determining why the LMS isn't meeting your needs, is it possible to make it work for you?

Maybe when the system was implemented, only some of the functionality was made live, but more exists that has never been put into service. It is also possible that new features have been added to the software since you purchased it, but those have never been put into operation. Are there features you aren't aware of or modules that can be added?

Consider re-tooling the existing software rather than implementing an entirely new system. In most cases a rebuilt system can be cheaper than a new one.

Pressures resulting from the current economic situation are causing many organizations to cut back and to try to do more with less. Organizations are striving to become leaner and more efficient. Staff shortages and budget cuts are prompting HR and training

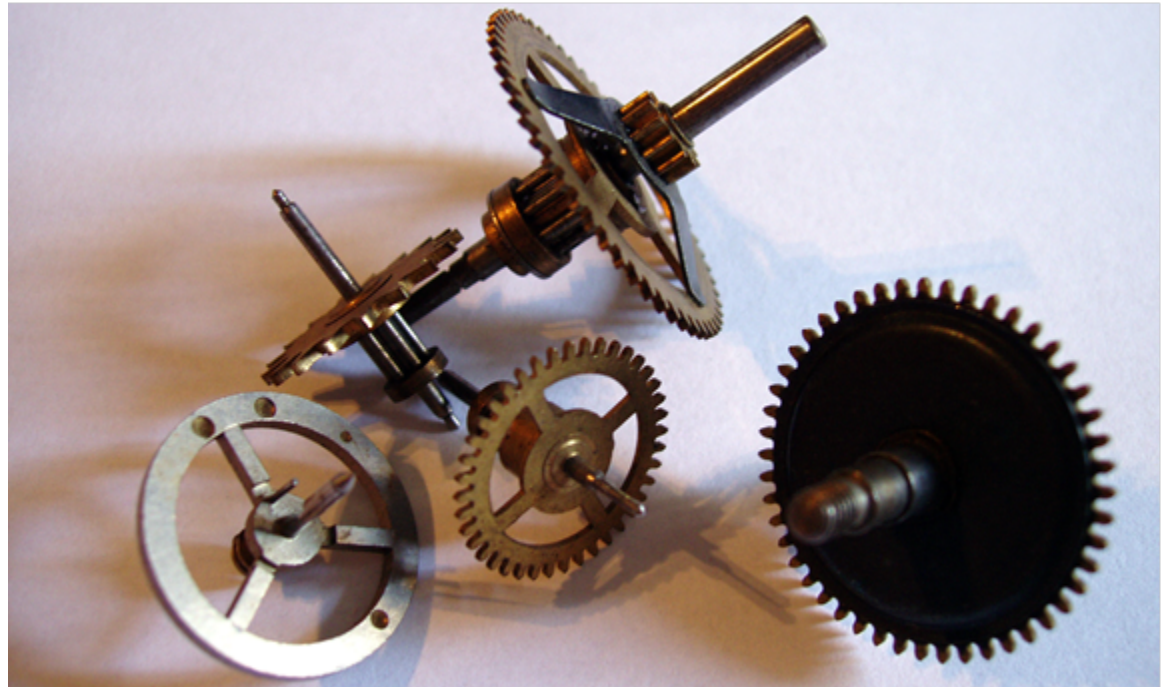
departments to look for ways to increase productivity. Before you purchase a new LMS, try maximizing your existing LMS first.

In addition to using new or hidden features, organizations might be able to tailor dialogs, automate tasks or add custom fields. They can expand use of the interface with new or re-designed Web pages. If the system has built-in reporting engines, custom reports can be created.

If the majority of the system works for you, but you have a unique need not covered, can you customize the software or have the vendor do it for you? Many vendors will perform customizations for a one-time fee that may be vastly cheaper than replacing the whole system. Also, some software platforms offer developer tools such as an API (application programming interface) that lets customers make modifications themselves from changing the look and feel, to writing custom pages and unique workflows.

Again, a discussion with your vendor is in order to ensure that your current LMS cannot meet your needs.

Build Your Business Case



Whether you've decided to re-tool the existing system or purchase a completely new LMS, to acquire the necessary resources, you'll likely need to build a business case. There are several steps in this process.

The first is to do return-on-investment (ROI) assessments of the current system and the options available to you.

ROI assessment of the Existing System

ROI metrics measure differences between costs, productivity and other factors before and after the new system was implemented. The purpose of ROI is to prove that the time, effort and money invested in a new system is providing some – ultimately financial – return, whether that is direct cost savings or indirect profitability from increased productivity or efficiency.

If you didn't do an ROI for your existing system or haven't updated that information in a while, you do that first.

Remember that implementing a new learning or talent management software is often part of a larger initiative, so it can be difficult to separate the two when measuring outcomes. Software supports processes, and if those processes changed at the time the software



was implemented, improvements could be a result of one or both changes.

Some measurements can be directly attributed to the use of software (such as time to generate a report from existing data), but others are related to new opportunities that are created by the addition of the new systems (such as the ability to offer Web-based training or virtual classroom instruction instead of conventional classroom-based training).

Often, the implementation of a learning or talent initiative can have wide-spread results, such as reducing employee turnover. This may have resulted from employees having access to critical learning and thus being more satisfied with their jobs. Or it may be that a talent initiative offers them more say in the direction of their work resulting in feelings of greater responsibility and fulfillment. A new LMS may offer the ability for employees to self-assess skills and create learning plans that will help them accomplish personal career goals and thus feel more productive or valuable.

Separating software from process results can be tricky, unless the project involved the simple replacement of one technology with another, which is seldom the case. The implementation of a learning or talent management system can be a large endeavor and has probably been initiated because of some other changes at an organizational or at least department level. Therefore, the following suggestions are related to the implementation of a new learning and/or talent management initiative and not to software alone. But each situation is different and yours will determine how and what you measure.

Acquiring ROI Data

Some measurement data should be available in financial systems, for example, the expenses related to employee travel for training. Others will be more subjective and require staff to estimate or track activities. Many of these metrics can be accomplished by creating survey forms that workers complete based on current tasks compared to previous workflows.

If the new system allowed the use of virtual training not previously available, the metrics can be estimated based on time and/or expenses related to delivering traditional classroom training. Figures can be acquired for instructor and student travel to and from a classroom venue. Then estimated results would be based on no travel time/expenses being incurred if the instructor stays in his/her office and the students stay at their workstations.

Utilize whatever information you have available to determine what you should and can measure. Strategic plans, organizational performance data and needs analysis reports can all be mined for measurement ideas. And you can make your measurements as large or as detailed as you can accomplish with the data you are able to acquire.

Ideally, the system should have automated many of the tasks previously performed manually. For those that were already automated, the software should have improved the process or made the data easier to access or more relevant. Measuring these areas should be straightforward. Others will be more difficult and will

require developing surveys or subjective ratings. But all data, whether qualitative or quantitative, is relevant and can be used to determine return-on-investment of the technology or of the processes introduced at the time of implementation.

What to Measure

Following are some samples of metrics related to learning and talent management initiatives. These are just samples and are by no means the only metrics that you can consider. What you measure should be customized to your specific organization and to the implementation. You may want to look at your organization's strategic plan to see what areas are targeted for improvement, and then extrapolate existing data based on these goals to use as your baseline or starting point.

1. Company/Organization Level

Metric	Description	What to Measure	Goal
Productivity	Any noticeable increase in productivity since the	Statistics related to	Increase in

Metric	Description	What to Measure	Goal
	implementation that can be directly or indirectly related should be considered. And there should be a comparison not just at the administrator or end-user level (employees being trained, for example) but also for supervisors and instructors.	product or service delivered	productivity
Completion rates	This could measure the completion rates of performance or learning processes before and after. For example, the number of employee appraisals that are submitted can be compared from one year to the next.	Number of completions	Increase in completion rates
Compliance	This is a comparison of the percentage of staff who met compliance before and after the initiative.	Percentage rate of employees who meet compliance	Increase in compliance rates
Onboarding	This measures the time that it takes to get an employee up to speed in his/her job role.	Time from hire to productivity	Decrease in time

Metric	Description	What to Measure	Goal
Turnover	This is a comparison of the number of employees leaving the organization or department before and after.	No. of employees who leave	Goal is a decrease
Accuracy in data and reporting	A new system should offer the potential for more accuracy in data and reporting. This may be difficult to measure since errors often go unnoticed. Typically, data from before and after is reviewed specifically looking for errors. In some instances, a relative feeling about accuracy is measured based on anecdotal evidence.	Number of errors	Decrease in errors
Alignment of goals	Most organizations have high-level strategic goals, which should trickle down to department and individual goals. A new system should make it easier to apply organizational goals to individual learning or performance plans. The number of reported individual goals that match organization goals could be measured before	Actual number of reported matching goals or a percentage of the total reported goals	Increase in goal alignment

Metric	Description	What to Measure	Goal
	and after.		
Competency improvement accuracy	Data can be used to determine if competency improvement is taking place in reality or just on paper. Competency improvement reporting at the individual level should be compared with the competency improvement reporting at the department and organizational levels.	Competency improvement at individual/ dept or org levels	Increase in accuracy of comparisons

2. Administrator/Department Level

Metric	Description	What to Measure	Goal
Administration tasks	Person-hours over a specific period for tasks carried out by admin/HR such as scheduling or entering employee data. For example, automated resource assignment compared to previous methods might be measured.	Time spent carrying out the tasks	Decrease in time
Reporting	Person-hours over a specific period, say, in relation to a monthly report	Time producing	Decrease in time

Metric	Description	What to Measure	Goal
	cycle.	reports	
Accuracy in data and reporting	Again, typically data from before and after is reviewed looking for errors. In some instances, a relative feeling about accuracy is measured based on anecdotal evidence.	Number of errors	Decrease in errors

3. Instructor/Supervisor Level

Metric	Description	What to Measure	Goal
Administration tasks	Time that instructors or supervisors spend doing administration related to learning/talent management such as completing forms, marking enrollments, etc., is measured over a typical period.	Actual time spent carrying out tasks	Decrease in time spent
Travel time	If the initiative involves introducing virtual training that reduces instructor travel, the time associated with travel during a period before the initiative would be compared to a similar period	Time spent travelling to delivery training	Decrease in time spent

Metric	Description	What to Measure	Goal
	after.		
Travel costs	As per the above, travel costs for instructor travel could be compared before and after the initiative.	Actual or estimated expenditures	Decrease in costs
Satisfaction level	This might measure the satisfaction level of supervisors with a performance appraisal process before and after. This would probably require a subjective survey.	Subjective ratings would need to be determined	Increase in satisfaction rating

4. Student/Employee Level

Metric	Description	What to Measure	Difference
Time managing own data	This could compare the amount of time a typical employee would spend viewing learning and skill options, determining personal requirements, registering for learning events, and so on.	Time spent (most likely based on a survey)	Decrease in time
Time taking	This could be related to a switch	Time spent	Decrease

Metric	Description	What to Measure	Difference
training	from classroom training to elearning or virtual training and compare the time required for students to take training including travel to and from venues.		in time
Costs for taking training	As per the above, this could compare the costs for a student to acquire training before and after the initiative.	Actual or estimated expenditures	Decrease in costs
Time to take evaluations	This could be a comparison of the time students spend taking evaluations or exams in person to completing them online.	Time spent	Decrease in time
Satisfaction level	This might measure the satisfaction level of employees with learning and/or performance processes before the initiative and after. This is would probably require a subjective survey.	Subjective ratings would need to be determined	Increase in satisfaction rating

Intangibles

The above suggestions are for tangible outcomes that new software or processes can provide. But, as noted, there are many intangible and trickle-down results that are difficult to measure when implementing a new initiative. For example, meeting compliance can prevent costly mistakes, which can mitigate risks and liability.



Improved access to data can reduce response times for time-sensitive issues, which can in turn reduce stress. Eliminating the need to travel can provide more time for other tasks that staff would like to tackle but did not have the time for before. Reducing staff turnover eliminates production delays that occur when mission-critical employees leave. Since hiring new staff is expensive (both in recruitment and onboarding time/costs), improving this process can save money and increase profitability.

Obtaining precise measurements of all the effects may not be possible, and measuring the bottom line alone may be deceptive to an overall success strategy. A classic example of this is with

business initiatives that involve laying off employees to save money. There may be an immediate cost savings, however, service levels may suffer as a result, which may cause customers to leave, reducing profits in the long term. In this same way, a lack of *instant* cost savings at the beginning of a new project may not indicate that the project is unsuccessful. All other areas should be considered, and time should be allowed for the trickle-down effects to become apparent.

Be aware that attempts to measure the intangibles related to learning and performance have not necessarily been successful nor widely accepted as accurate. This difficulty goes hand-in-hand with issues related to valuing the human capital possessed by an organization. Much has been written on the subject of "human-resource accounting" in the past couple of decades both in academia and in the business world — mostly about its impracticality.

If the measurements you seek are subjective or not easily available, assigning staff hours to the acquisition and measurement of data

can reduce productivity. Be sure to measure only what is relevant to the implementation of the new initiative, and then use that information for future planning and even more improvement. But don't expect your new system to eliminate problems that were the result of poor planning, inefficient processes or organizational issues. Software is only as good as the processes and people it supports.

Define the Problem

Now that you have a current ROI assessment, you can compare that to any past ROIs done on the existing system. You may find that while improvements were significant in the beginning, those have waned. Showing two ROIs side-by-side may show how the existing system is failing.

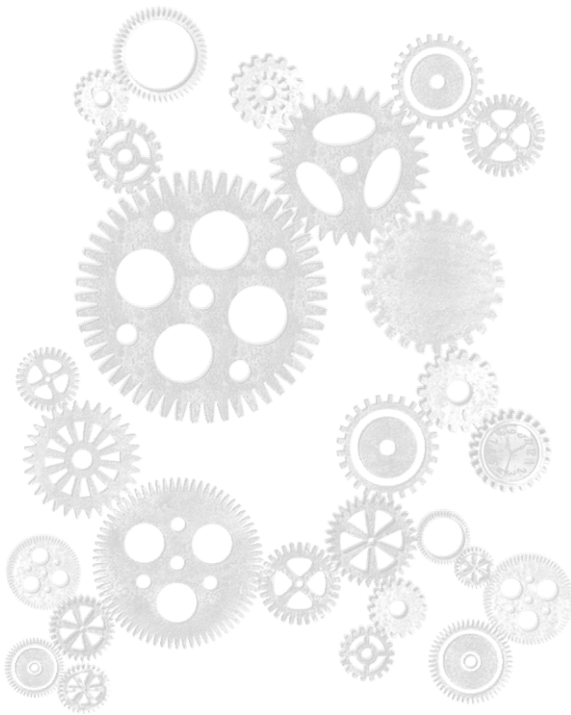
You can also compare your LMS ROI to ROIs for other enterprise systems if you can access those. If nothing else, ROI data for a recent implementation of a different kind of system should show

significant improvement. This can be used to help build your case as it shows the successful outcome of making a change.

Do as much research as you can to justify what's wrong with the existing system to define the problem clearly. But you don't need to include all the data in the business case. Summarize or present infographics and offer to provide the detailed ROI information on request or attach it in an appendix.

Identify Solutions

Note that it says 'solutions' plural. Never offer one solution when preparing a business case. You need to show you've done your due diligence by identifying all viable solutions. The pros and cons for each should be outlined clearly. Remember that while you may believe that one solution is ideal, you must prove it. Define the risks and issues for each along with feasibility, then forecast the costs based on available data.



You may want to rank the options in different ways and give them points based on each type of evaluation. Rate them by cost, feasibility, benefits, etc. You must be able to show not only which solution you recommend but why. Make the rating system as simple or complex as you need to, and again, use visuals if you can.

Recommend a Solution

If you've been thorough, you know which solution you'll be recommending when you present your business case. Be clear as to which of the options you recommend and quantify the benefits of your preferred solution. If you've done your job, the best solution should be self-evident by the business case you've presented.

As you know, a fully functional LMS can provide a multitude of benefits to a large organization, including improving the speed and effectiveness of the training process, ensuring an enterprise is in compliance with industry standards, improving efficiency and communication, contributing to knowledge transfer, and the retention of employees. When describing the outcome, illustrate

your vision for the future, but don't exaggerate. You need the project to live up to expectations.

Of course, before you make your recommendation, all members of the team should be behind the choice. Even if you are the project sponsor, you still need the support of all contributors. If you don't have that, consider that if you can't convince them, how will you convince those higher up?

Provide a Plan

Be sure to also include a plan for implementing the solution. This should be brief and does not need to be a full project plan. That will come after a decision has been made. You may be sure about your choice, but higher ups may want something different. If you put time and effort into creating a full project plan for your recommended option, those resources may be wasted if a different decision is made.

But your case will be furthered if you are clear as to how you move forward especially how you will mitigate the risks involved. A SWOT analysis would not go amiss here.

Present Your Case

There are many templates for business cases available online, but generally they should contain an executive summary, and outline of the problem, background information, a list of possible solutions, financial information, risks and consequences and, of course, a recommendation. Lay your business case out in steps or stages and include charts and graphs whenever possible. Visual representations are often more compelling than narratives or plain data.

The success of your project depends heavily on the endorsement of senior management. Ensure that everyone at the top understands why you need the solution. Get all the executives on board first and make sure they believe in the benefits and will speak up to promote it. By creating a strong business case, you'll more likely achieve buy-in from the key stakeholders.

You've Decided to Replace, Now What?



You've presented your business case and a decision has been made to replace your existing system. That may be great news for you if

that was your preferred option. But it may not if you were a proponent of re-tooling. If the decision was not to go with your recommendation, don't be too hard on yourself. You may have done a great job presenting your business case, but there were considerations or pressures that were beyond your control.

Either way, you've been told to move forward with replacing your existing LMS with a new system. A budget has been allocated and a time frame identified. What's next?

Build Your Team

A typical project of this kind has a number of key team roles both during the product/vendor selection process and during the implementation.

First, it is important to the success of a corporate software implementation to assign a "champion" or project sponsor. The project sponsor is the individual (or group representative) who has requested the project.

Responsibilities include:

- Initiating and monitoring the project through selection and implementation to adoption
- Establishing project parameters
- Committing resources including budget
- Appointing the project manager
- Developing or overseeing development of the project plan
- Ensuring impediments are identified and resolved quickly
- Controlling costs

There should be a Project Manager/Team Leader. This person is responsible for day-to-day contact with members of both the vendor implementation team and the customer implementation team at each project stage.

Responsibilities include:

- Managing each stage of the project and the ongoing day-to-day activities
- Coordinating customer resources to the project
- Building a project team and managing project personnel

- Formulating actions for the project plan
- Assigning tasks to customer project team members

At different stages of the project, it will be likely that Subject Matter Experts from different areas of the organization will need to participate in the project. These team members will provide information on business rules and standard operating procedures used within the organization that must be translated into the software system, either through configuration or custom development.

IT resources may be needed for various technical responsibilities that the customer must carry out. If that is the case, a system administrator may be identified.

Needs Assessment

The next step is to do a needs assessment. This can be done internally, but organizations often hire outside consultants to carry this out, especially if they want a completely bias-free analysis.



Regardless of who performs it, this needs study should first analyze the knowledge that an organization already has, which might include documentation, employee know-how, processes, product knowledge and patents. The results of the survey should show where the knowledge is located and how it is accessed and applied.

An assessment of internal knowledge should include a survey of organizational culture and history, strategic direction, partnerships and relationships, communities of practice, processes, products and services, systems and tools, patents and technologies. An analysis of external organization knowledge could also be undertaken if that affects the overall process.

Consideration should be made to the fact that most knowledge remains in individuals and is seldom formalized or documented. Much of it is never shared and often lost as a result. The next factor to consider is the profile of the learner population. The analysis should also consider the objectives of learning for the organization, and how the results will be measured (ROI).

Current processes and practices should be analyzed to determine where failures occur or where improvements can be made. The existing LMS should always be considered in evaluation of current practices in case those have been designed to fit with the available functionality. If you are starting from scratch, you should look for ideals rather than simply planning to repair processes that are already flawed. In a perfect world, what would your methods look like?

A scoping study includes defining:

- corporate needs
- workflow processes and business practices
- reporting needs
- data migration protocols
- customization with macros, custom fields and automation to reflect defined workflow processes
- external system synchronization
- key user group expectations

Results of the needs analysis should be criteria for setting learning goals and for the processes needed to suit the learning population and meet the organization's goals – rather than how to fix what's currently wrong.

And be aware that the criteria you develop in the needs analysis can be used to compare products and services in the next phase. The results can be used as the basis for a Request for Information call or for a Request for Proposal document. However, be aware that what is available in the marketplace may not exactly meet the needs of the project, so expecting to find an exact match may not be possible. But you should still dream of that ideal world.

Marketplace Investigation

Research and marketplace investigation come next. Try to discover all the options and possibilities in processes and technologies. The learning and development world has exploded with tools and technologies, so without clear criteria, this can be a daunting task.

The critical process here is to determine which features and functions will support the processes that will best achieve the organization's goals. Having done a thorough needs assessment will assist this process considerably, allowing an organization to quickly weed out the tools that don't match its needs.

In addition to software needed to administer learning & development activities, you need to consider the activities themselves and which tools will facilitate those activities.

Possibilities include instructor-led training, e-learning, social learning, mentoring and more. Each type of activities has its advantages and appropriate application. And each type has specific tools and technologies.

Those involved in this process should have an understanding of the processes and how to best fit all necessary requirements and styles. You should understand the uses of instructional technology tools but remember to focus on both the learner and the organization.

Solution Selection

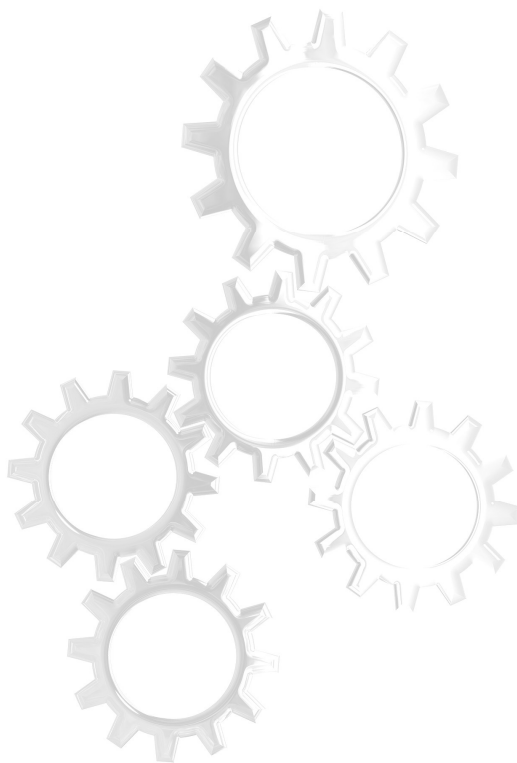
The selection process usually involves preparing Request for Information or Request for Proposal documents as mentioned earlier. These are sent to vendors who are anticipated to have suitable products and services. The needs assessment done earlier may form the basis for these documents. However, the marketplace investigation should have provided a “reality check” with relation to the project needs, and modifications can be made accordingly to meet the reality of what is available.

It is important to note at this point that an RFI/RFP that has requirements that are too far beyond the capabilities of the vendors will often not be responded to. Responding to RFIs and RFPs involves extensive resources on the part of the vendor. Often teams of sales and technical personal are assigned for days or weeks to the task of preparing a proposal for a large project. In addition, the cost of printing, binding and shipping multiple copies of a document can cost the vendor hundreds of dollars. If there appears to be little chance of meeting the requirements and winning the contract,

some vendors may simply opt out. If you had your heart set on a specific product, you may be disappointed when the vendor of that product doesn't respond to your bid call.

Of course, the reverse can be as much of a problem. Receiving too many proposals from those with unsuitable products and services can cause unnecessary work for the organization issuing the call. Ideally, the RFI/RFP should indicate which features and functionality are critical and which are optional or on a wish list. This should result in only qualified vendors submitting responses, without them being scared away by unreasonable or onerous demands.

Another warning at this stage involves a phenomenon called scope creep. This usually happens when those involved in selection are dazzled by the amazing features available in the marketplace and lose sight of the business goals. The final criteria for selecting suitable solutions should always be which tools fit best with the results of the needs assessment – not which are the flashiest. Many



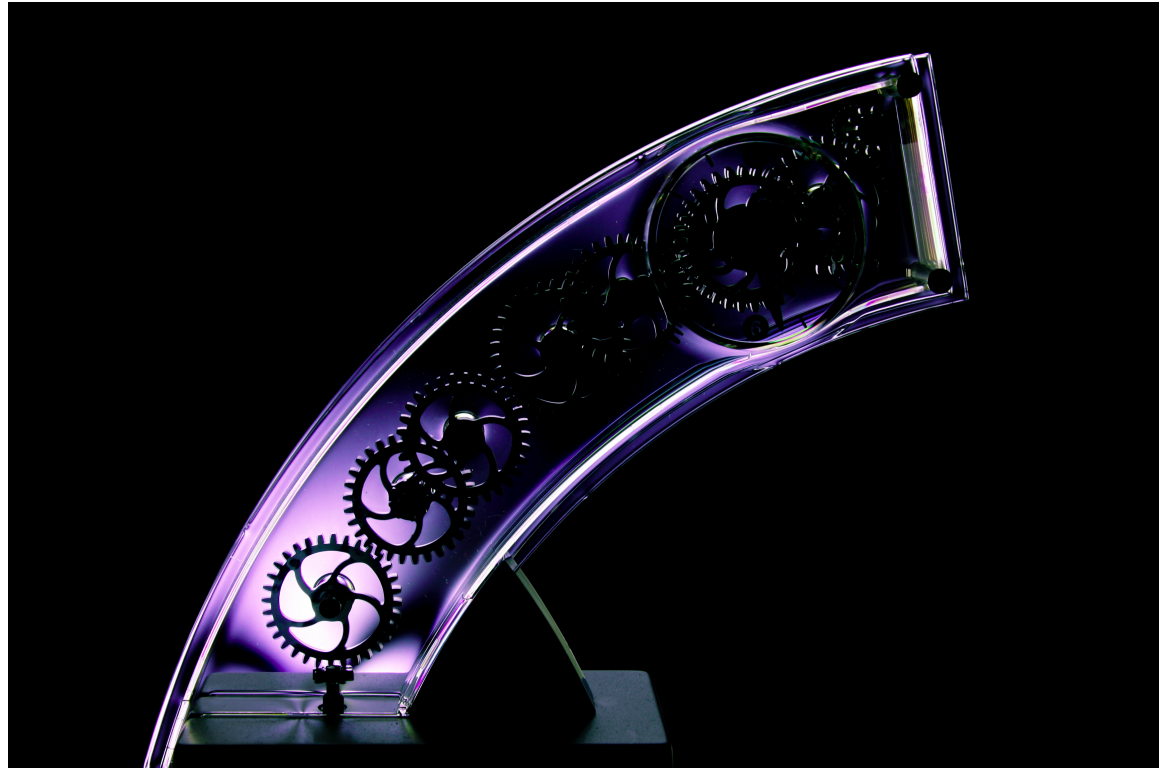
feel that more is better, but unnecessary features and functions may actually interfere with the task at hand and cost extra money.

Make a strong effort to find products that have as close a fit to your real needs as possible. However, be aware that each organization is unique. Matching every task with a feature is unlikely as no vendor can afford to cover every possible way of doing something. Yes, tools that offer out-of-the-box operation are usually the easiest to implement and the most cost-effective. But those that offer customization can often fit an organization's needs better. Finding suitable products that offer a combination of instant functionality with tailoring possibilities can often be the best solution.

Another factor to consider is how different products will work together. Most applications need to work with at least one other system. Industry standards have been developed for certain types of products to ensure compatibility, but testing is the only way to be sure that products will interact seamlessly.

At this point you should remember the "good, fast, cheap" rule of business. In an ideal world you would be able to have all three, but reality says you can only ever have two of the three. You might want to determine which two you will settle for: good and fast; fast and cheap; or good and cheap.

Make the Change



Implementation

Any enterprise-level software project is a complex assembly of tasks, decisions, migrations and documentation, and implementing an LMS is no exception. Effective communications are essential in managing a project. Coordination of resources to efficiently utilize time, skills and effort are imperative. Team building is key to managing a large or long-term project. If the team is committed to the project it has a much greater chance of succeeding.

Project Management

The entire project should be the responsibility of the two co-project leaders – one leader from the client organization and one leader from the vendor.

Their responsibilities are to:

- establish the project parameters
- develop the plan and define the budget
- ensure the overall integrity of the plan by managing the staff on each of the project teams

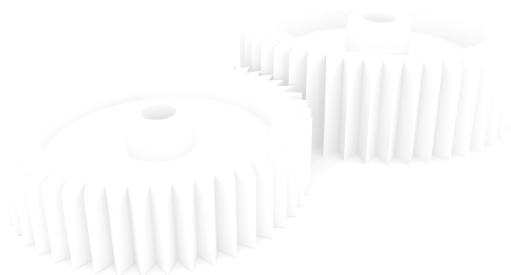
- ensure impediments are identified and resolved
- control costs
- manage communications to all project members, corporate staff and management, and local site staff and management

The customer project manager will participate in reviewing, formulating actions and revising the project plan as necessary, and as such, should have appropriate authority to commit the required customer resources. For medium to large-scale implementations, the customer project manager ideally should be available to the project full time.

The project managers must establish a plan with input from the vendor, implementation specialists and the client organization. Changing requirements must be managed efficiently.

Create a Project Plan

The project plan identifies all tasks and activities required to complete the project and the resources required for completion of



these tasks and activities. In particular, it defines the mutual involvement of the vendor and the customer in the project.

Discussions between the vendor and the project team help to define items such as; data to be migrated, training required, reporting needs and expected customizations. Contact persons from both sides are identified and responsibilities of team members are discussed. This allows the client to identify tasks and activities necessary to complete the project plan and the resources that will be required for achievement of these objectives.

Implementations of a broad scope are often divided into progressive stages that are completed over a period of time. Breaking the project into incremental stages can improve the focus of team members and allow for efficient resource allocation of the implementation team. The stages can often be completed concurrently depending on the requirements of the project team.

The project plan should incorporate a comprehensive implementation schedule that reflects all the milestones related to

the project. This may include people and resources required at each step, financial and budgeting considerations, and balancing workloads. Specifically, the schedule should provide realistic timelines for the pilot (optional) and testing phase of the project, particularly if extensive custom reports and macros are required. Be sure to include training for both administrators and end-users if necessary.

The draft project plan developed by the client is reviewed and revised by both parties and approved before implementation continues. Clarification on the work is defined and reviewed at this stage. This plan for the project forms the basis for monitoring and measuring the progress and success of the project.

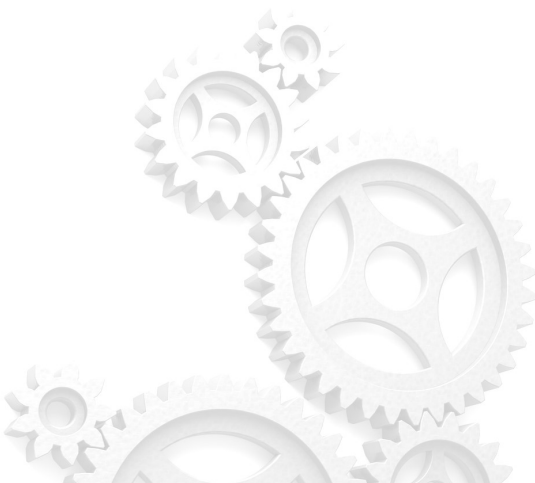
In smaller organizations, the entire project including user training may be accomplished in as little as a couple of weeks. In larger organizations this could easily be extended to several months depending on data migration needs and customization of the application and reports, as well as availability of all the necessary personnel at the customer organization.

Pilot Program

For large implementations, pilot programs are recommended. Once the project parameters and project plan are defined, a pilot version of the LMS is installed and configured for testing. The system should be configured in the operating environment intended for live deployment to all users. This will ensure accurate results for performance tests at the next stage.

Imported or input data is added to the system for testing to assess performance over the network and for reporting and other functionality. It is not necessary for all product tailoring to be complete before testing commences.

The testing phase may take several weeks to complete depending on the size of installation and the complexity of the data. The system should be tested with several users to assess concurrency or performance issues.



At the conclusion of this stage, the functionality is verified as operating correctly and signed off. The system is now ready for live access.

Ensuring Success

There are many factors involved in successful implementation of a new enterprise system.

The first is management support. A buy-in at the top is necessary for the success of any enterprise-wide application and should be garnered as early as possible.

Activities should be aligned with business goals and be considered as a factor in organizational change.

The system should be solution-focused not technology-focused. The system should be integrated with a consistent framework and tools.

The end-users should be taken into account at all stages and have an active role in the process.

The success of any software implementation rests on the people involved. The project team should have a balanced and complementary skill mix with sensitivity and knowledge of the client environment and a sound knowledge of IS technology. The project team must be responsive to the changing business requirements and have strong communication, analytical and problem solving skills.

Planning is an ongoing process and involves anticipating the potential impediments to a successful project. The project manager must establish a plan with input from the vendors, implementation specialists and the client organization. Changing requirements must be managed efficiently.

Effective communications are essential. Coordination of resources to efficiently utilize time, skills and effort are imperative. Team building is vital to managing a long-term project.

Key stages of implementation include system installation and configuration, training, testing or pilot program, and finally going live.

Adoption

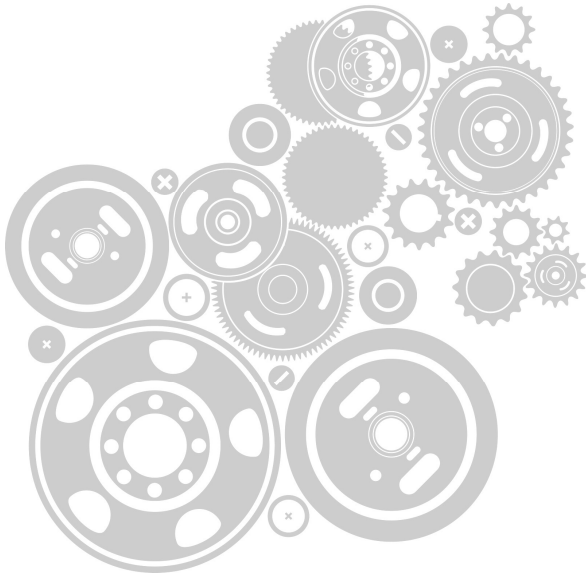
Once the system has been implemented, the organization moves into the adoption stage. This is when organization change truly occurs. Adopting a new enterprise system involves building on existing practices, linking activities directly to business goals, training and marketing to the organizational to obtain buy-in at all levels.

All parties should understand the results of the needs assessment and the results of any research carried out. This will give the members of the organization a thorough grasp of the reasons and expected outcomes.

Train the organization on usage and use the tools in practical applications. Conduct test runs and involve as many employees as

possible early on. Collect opinions and feedback from all users and refine the system as necessary. Enable employees to use the tools at their disposal and encourage participation at all levels. You should ensure that the system you have put in place allows for the use of learners' prior learning and remember that everyone is a learner and a potential teacher.

Middle managers are the ones who will present the new system to the employees. Middle managers are often skeptical of organizational change, which to them often represents a potential drain on productivity. But if middle management doesn't support enterprise learning, the learners will not see its importance — for themselves or for the organization. Middle managers need to see the big picture of how the implementation fits into the organization's strategy. Counter any concerns by explaining the business benefits of change. Show that it is a business decision rather than just a morale-boosting scheme. Engage managers by having them test tools and involve them in the promotion.



The buy-in from employees will come from the example of superiors and from their understanding that the new system can be a tool to support their own advancement. In your needs assessment you should have done research on your organization and your audience. Share the results with the employees and show them that you are responding to their needs as well as to those of the organization. The more ownership that managers and employees take of the initiative, the more successful it will be. A focused marketing plan can play a key role in overcoming resistance.

One key to successful promotion is to treat the new system as a product and treat the audience as potential consumers. The organization is essentially offering a product that will provide some benefit. Proper promotion should provide thorough knowledge of the product and its value to the consumer.

One of the first steps should be to brand your project. Logos, graphics and colors can personify your learning offerings and build familiarity. Brand recognition breeds trust and acceptance in ‘consumers.’

You also need to create a memorable message that motivates and produces enthusiasm. Creating a theme that links your branding to your message will create consistency and credibility. But remember to keep it simple. It needs to be remembered. Your message should cultivate interest and enthusiasm and create momentum. You should show your audience the virtues of the new system and how to incorporate it into their daily lives.

Develop a communication plan and be creative in your approach to raising awareness of your initiative. Use whatever means are already available such as e-mail or company newsletters. Use poster campaigns and encourage word-of-mouth promotion by managers.

Find as many opportunities to reinforce the message, linking it to other corporate programs or events. Hold an open house, have short introductory sessions or create a contest. Use whatever methods suit your corporate culture to promote the program and individual courses or events, while providing tips and outlining benefits.

Incorporate the new system into new employee orientation to immediately implant the idea that it is part of the corporate culture. Once one group of people is on board, that will influence individuals or other groups that it comes in contact with.

One of the best ways to guarantee success of an initiative is to ensure there is something in it for everyone. Track participation and make appropriate rewards available. Recognize achieved goals formally or informally. Monetary rewards or gifts are great if appropriate, but even verbal or written praise is always appreciated.

Find out what the obstacles are to acceptance of the new system and overcome them. Give the workers the time and space they need to learn the new system. Provide easy access to answers when workers have questions or problems. Make it easy for them to contact mentors or experts through an online forum or help line.

Collect feedback and analyze the results. The employees themselves are the best judges of how the system is working or not

working for them. Determine what's effective and what isn't, and make appropriate changes. Workers will be more cooperative if you demonstrate a genuine interest in their opinions and respond to their needs.

Assessment and Evaluation

There are two levels of assessment. The first is assessment of the activities or processes. The second is assessment of the overall program or outcome. You can use the same formula for return-on-investment detailed earlier for both.

When it comes to assessing the project itself, in the needs assessment you should have determined your goals and expectations of implementing the new system. Once the project is fully underway and results are available for analysis, perform evaluations and determine the ROI for the project. Your initial goals should determine how you will measure success — performance improvement, productivity increases, direct cost savings or other business metrics.

And just because the project is up and running and appears to be working well, remember to reassess regularly. Organizational needs change and your strategies should follow suit. Technology also changes, rapidly. Although your current project may be running effectively and efficiently, you should never rule out the possibility of making it better. New research, better techniques and more advanced processes should be considered as they become available. Not all will be necessary or suitable for your needs, but some might be.

Without proper care and attention, most things will degenerate and deteriorate over time. So even if your needs do not specifically change, maintenance is important.

Conclusion



Let's face it, everything needs maintenance including enterprise systems. But sometimes more than regular maintenance is required. Re-tooling or refurbishing is one option. Replacement is another.

But before you make a decision about which is the right move for your organization, be sure you've considered all the pros and cons. Changing an enterprise system is no small task and can have significant consequences throughout your organization. We've tried to provide you with enough information to help you through the process of making the decision on what to do and also on what should happen if a decision to replace is made. Good luck with whatever you decide.



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