

An



White Paper

Implementing an LMS

A 12 point plan to help make your LMS
implementation painless

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**Implementing an LMS:
A 12 point plan for a successful LMS implementation!**

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Introduction

So you've convinced the board of the business benefits of introducing an LMS¹, met the vendors and made your choice. Now you get to the interesting bit – implementing your new system!

For many organisations, this task is relatively straightforward. Many Learning Management Systems are well specified and based around standard web components and databases. These technologies are proven and probably already used in your organisation to run other systems. But whilst some organisations are able to implement easily and quickly and enjoy excellent ROI despite all the technical hurdles, others find the process exhaustive despite having all the latest, high powered systems to hand. This white paper draws upon the experience of e2train, as one of the UK's leading suppliers of LMSs and elearning authoring tools. It consolidates data drawn and created from a variety of sources. But primarily it comes from the experiences of e2train's clients themselves and the observations of those experiences. In doing this, it identifies some of the issues that have enabled organisations to be successful.

Every company faces a set of differing circumstances sufficient to make its LMS deployment unique. But there are also many common steps and processes which can be applied to each institution. This white paper looks at those steps and processes.

Executive Summary

In any enterprise wide software implementation, there are a number of issues that users face which are common. These include making sure that your organisation has the right technology, and sufficient budget. You should also be sure that the software actually addresses the issues that are critical to the demands of your organisation.

But the introduction of a learning management system also requires a number of specific issues are addressed which are unique to this kind of system.

This white paper identifies 12 key issues which are bound to effect an LMS implementation. They range from initial planning and budgeting, how to ensure that you have the right technology in place, getting users and other administrators on board, the importance of having the right content, going live with the system and ensuring its ongoing success. The conclusions of the paper are, in the main, based around actual statistical experience.

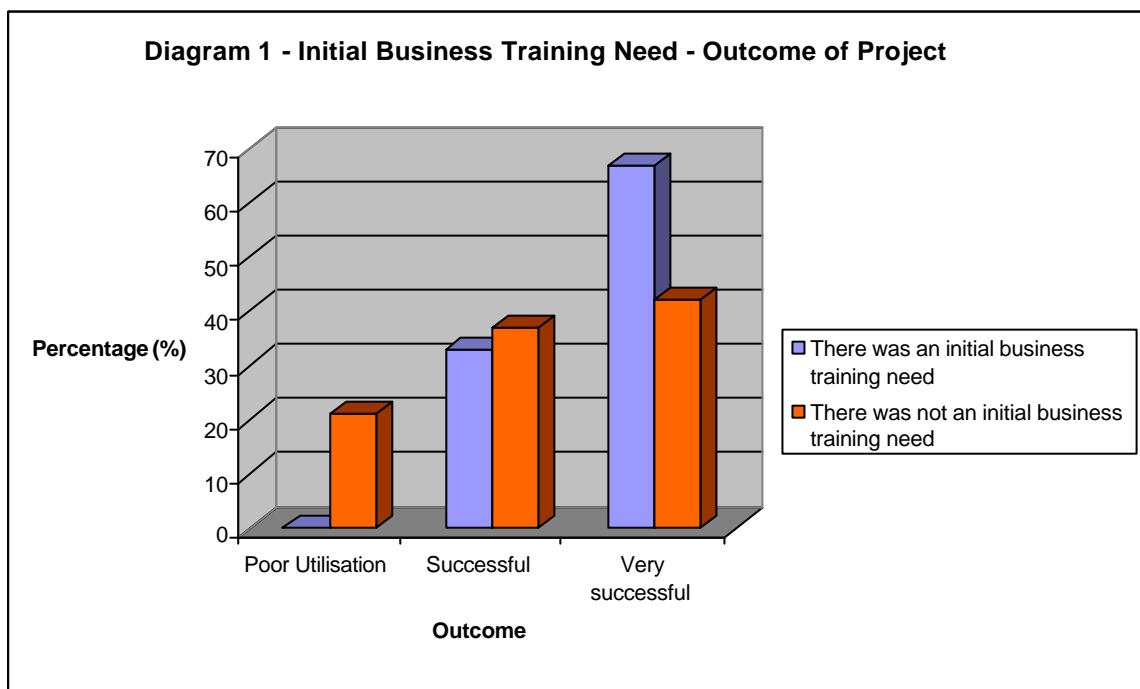
¹ If not, we recommend you read 'The Business Benefits of Introducing an LMS' available from the e2train website (www.e2train.com) before going any further.

12 point plan for a successful LMS implementation!

1. Identify a Clear Business Training Need

As you might expect, having a clear business training need as part of the initial business case for implementing an LMS has a positive influence on the success of the implementation project. Such a business need might be the rollout of compliance training for a financial services organisation, support for a rollout of a new IT system or training the sales team ready for the launch of a new product.

At e2train, in our experience, in every project where a clear business need has been defined in advance, the results were successful. Conversely as many as 20% of projects who have pressed ahead without a clear business need have resulted in a poor utilisation of system (see Diagram 1).

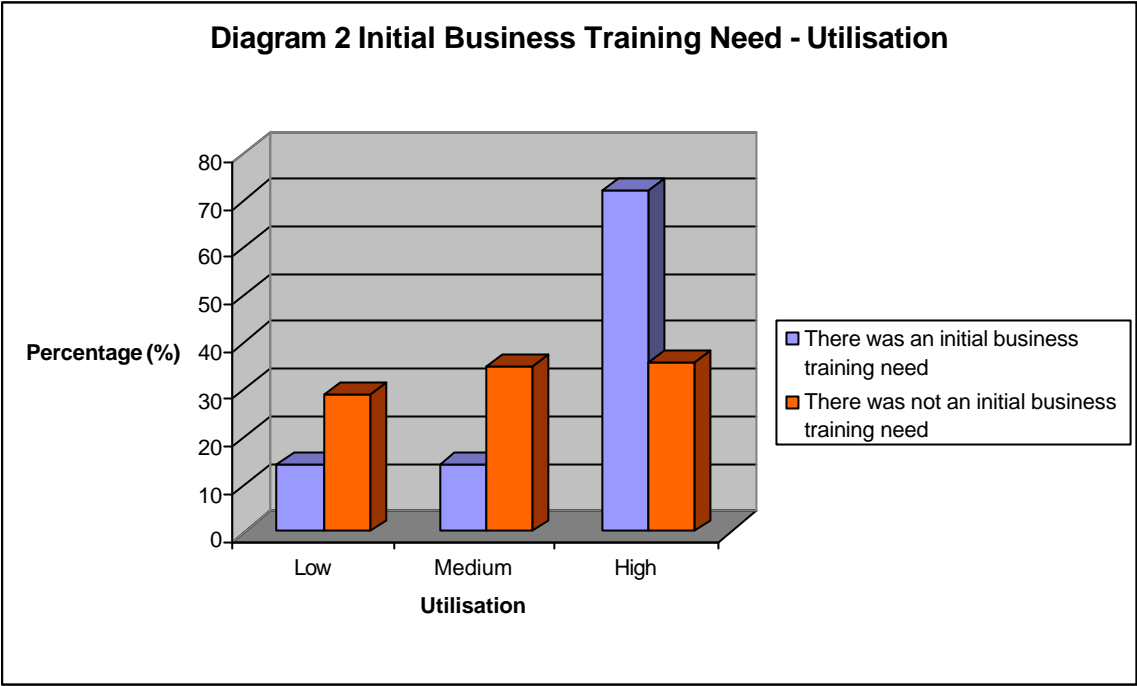


Having a business training need normally means that there are a number of contributing factors to support the LMS project. These include;

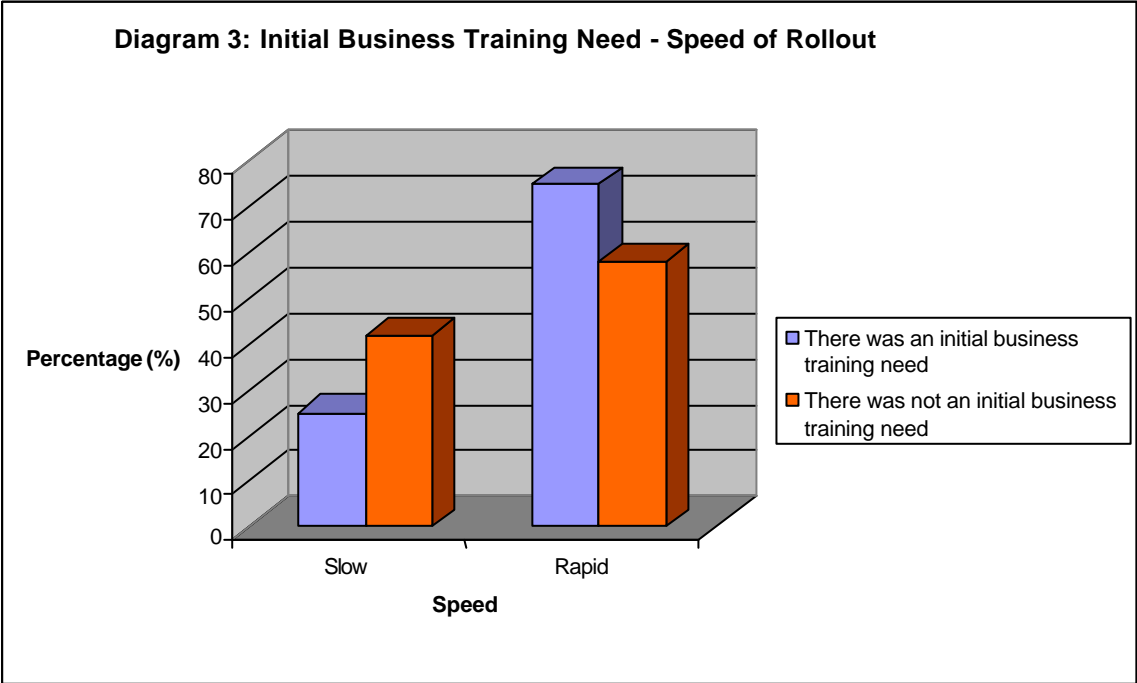
- Having the support of senior management
- Allocating the right resources
- Having access to relevant content and strict deadlines
- Having a measurable learning outcome

This may be attributed to the fact that employees are often *required* to do the training (e.g. for regulatory reporting purposes). Thus driving the initial change management normally required for implementing LMS and e-Learning.

The figures are equally convincing from the point of view of ongoing utilisation of the system (see Diagram 2). Unsurprisingly, this increases dramatically where a clear business requirement has been identified in advance.



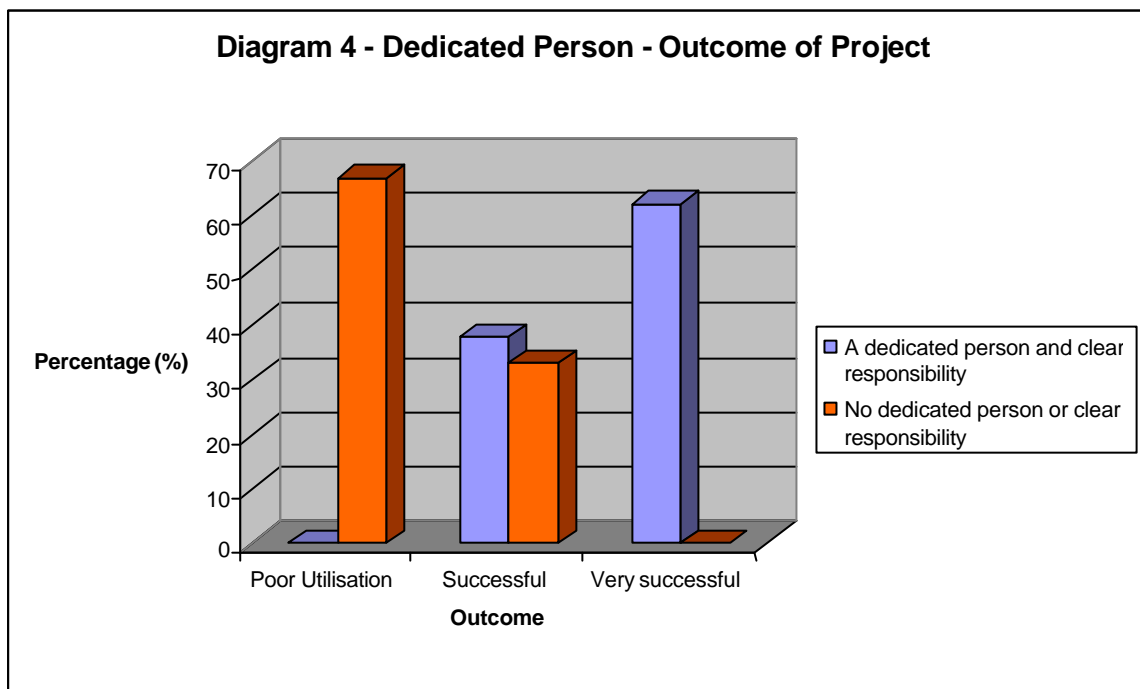
Perhaps more surprising, a clear business need also improves the speed of the rollout of the system (see Diagram 3). You are three times more likely to have a rapid implementation where this is specified. This is most probably because it removes some of the major barriers and arguments surrounding the roll out. Instead, the focus is on the system's required capabilities and set up.



2. Have a Person with Clear Responsibility and Time for the Project

For the implementation and rollout of a Learning Management System, as with any new IT system project, it is crucial that there is a person within the organisation who has clear responsibility for the LMS implementation. It is also important that this person has been allocated the time and resources to be able to focus on the project.

From our experience, where a single person employed by the client with dedicated responsibility and time was responsible for the LMS implementation, the outcome of the project was always successful (see Diagram 4). In projects, where there wasn't someone dedicated to the project two third of them resulted in poor utilisation and only a third were successful (see Diagram 6).



Where someone has been given responsibility for the project on top of an already full job role, the project is likely to suffer from a prolonged implementation and rollout, as well as a low utilisation (see Diagram 5). Similar outcomes also result where a committee is in place, without a person coordinating and implementing the committee's decisions. However, in the latter case it is likely to cause delays in agreeing requirements and rollout, but may not impact the final utilisation of the LMS.

For e2train's implementations, 88% of deployments had quick rollouts when a client person had dedicated time to the project verses only 13% where they did not.

Diagram 5 - Dedicated Person - Speed of Rollout

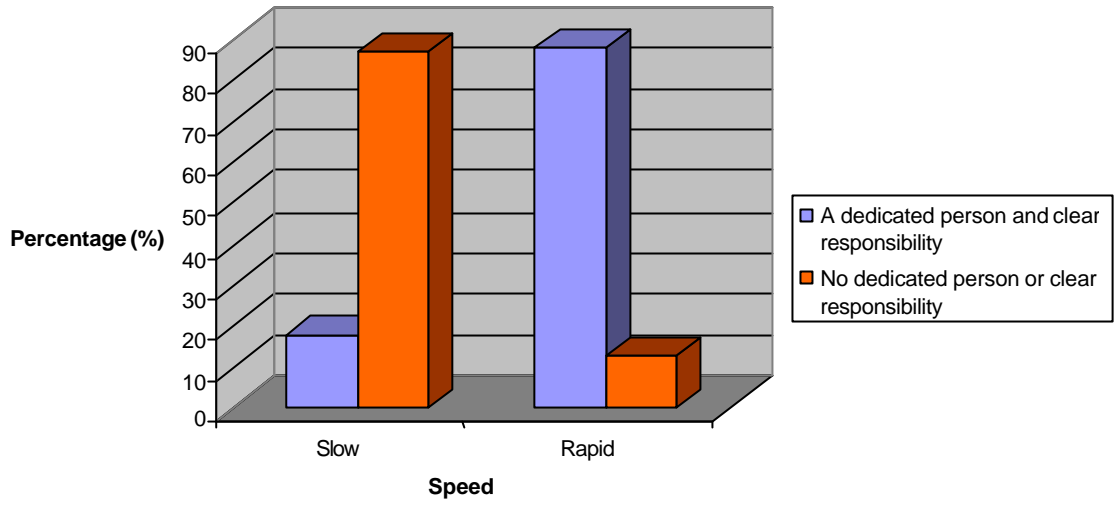
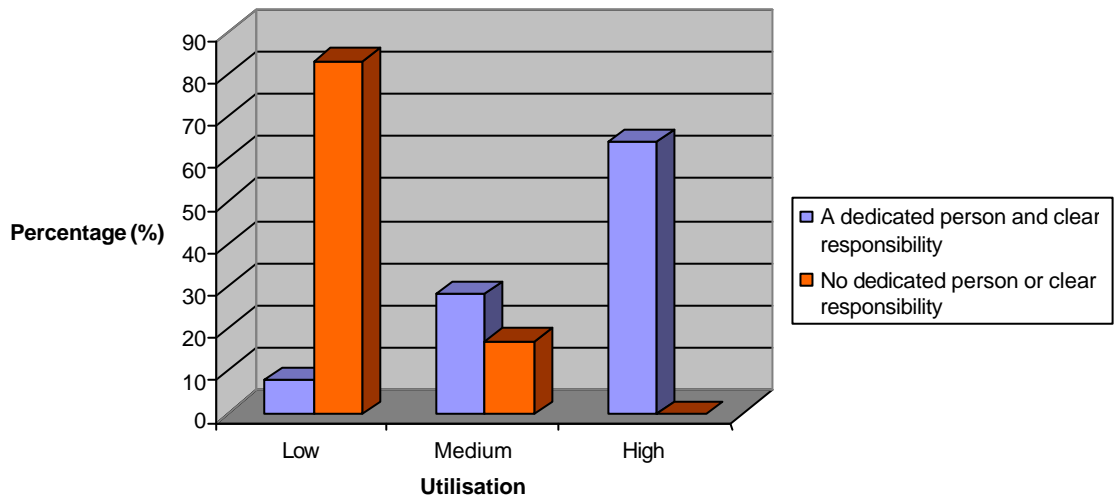


Diagram 6 - Dedicated Person - Utilisation



3. Make sure IT are involved and Supporting the LMS Project

Delay involving the IT department in the early stages of your project at your peril! From our experience 95% of projects were delivered on time when the IT team were involved from the LMS selection stages of the project right through to implementation.

When the IT department was not involved until after the LMS had been selected and purchased (it does happen!), then the projects always resulted in delays for one reason or another. Conversely, where an IT department has been brought in early on in the process, and played a large part in the project, it has often possible to implement in a surprisingly short time period (see Yorkshire Building Society case study below).

Case Study: e2train and YBS IT departments work together for speedy implementation



With incoming FSA compliance requirements intended for the sale of mortgage and insurance, Yorkshire Building Society (YBS) needed a system that could deploy and manage all elements of training in this area and awarded the contract to e2train for its Kallidus LMS.

In this case, a speedy implementation was essential so it was critical to pre-empt any IT issues that might arise. The solution was to put e2train's technical specialists together with the Society's IT people. e2train worked closely with the Society's key technical teams including:

- Their Desktop Services Team (responsible for everything from commissioning the dedicated servers to ensuring end user PCs were capable of accessing the LMS).
- Their Network Services team (to ensure bandwidth demands would not adversely affect crucial customer service and teller systems)
- Their Database Administration Team to ensure that a live and back-up databases were efficiently set up and maintained.

e2train was first approached at the end of 2003 and a comprehensive proposal was submitted immediately. At the end of April 2004, Kallidus was installed onto the Society's server, and licensed to manage 2200 users nationwide.

The e2train package also included comprehensive training and maintenance as well as copies of Kallidus Authoring System, allowing the creation of bespoke training in-house.

4. Think through your Customisation Requirements

If you have chosen your LMS vendor well, they will be able to provide you with a system which may be customised to meet your specific needs. This is especially useful for organisations that work in extremely specialised fields of business which lead to specific and unusual training demands. But most organisations today benefit from an LMS that can be integrated with a HR system. At minimum, your system should be branded with house colours and logos.

At e2train, the most common requests for LMS customisation come from:

- Organisations that face specific reporting requirements, either from regulatory bodies or for broader enterprise reasons.
- Organisations who wish to use the system in close conjunction with other online systems that already have a specific look and feel which they wish to emulate.
- Implementations where the LMS must be integrated closely with other software systems and databases which demand dedicated data feeds to be set up.

As with any customisation or configuration project it pays to thoroughly think through the requirements in detail prior to implementation. That means:

- Cross referencing business needs with the LMS's functionality; such as checking you have access to the relevant reporting information and that you have the right kind of collaboration tools.
- Involving IT to understand the technical implications of required customisations
- Consulting with other users about their requirements
- Understanding the repercussions of any customisation work and budgeting appropriately
- Clearly specifying and documenting the customisation requirements in a full 'statement of work' before progressing with the project.

In our experience, where requirements have not been thoroughly thought through, it will almost always result in changes during implementation. That inevitably leads to delays, increased costs and even systems which don't achieve the full business needs which is frustrating for everybody.

5. Planning: set realistic timelines; think through potential issues

One of the most rewarding steps to add into the LMS implementation process is a documented plan. This will save time, effort and provide valuable cost savings. Good planning will ensure that short term technical problems are more easily met. It will also enable you to reduce the issues surrounding the delivery of your course materials – especially if they contain rich media which requires plug-ins. It should also ensure that the system is more easily scalable in the future

In preparing plans for your LMS, e2train has identified a number of questions that it is useful to address. These include:

- What are the short, medium and long term training goals for our organisation and how can the learning management system help us reach them?
- What is needed to achieve the short term goals (software, hardware, testing, going live, educating trainers and users on the system)?

- What is needed to achieve the long term goals?
- Do we have the right technical infrastructure and database solutions to run all the applications properly, especially during the peak periods?
- What do we need to do to ensure that the benefits of the LMS are extended to the broader enterprise so that the information can be usefully shared?

In formulating your plans it is always important not to underestimate the future success of your system, or indeed the speed at which it will grow: it is not uncommon for clients to extend their system licenses well ahead of expected schedule as the demand for access to the benefits of elearning can be surprisingly strong.

6. Budget for the entire project

One of the biggest obstacles to success of an LMS is not to budget for the entire length of the project. Perhaps surprisingly, few organisations fail to budget sufficient funds at the start of a project. In a recent survey, one of the sources of greatest satisfaction amongst users with LMS providers was their ability to bring projects in on budget². Moreover, the same survey also noted that there was no correlation with the success of the project and the amount per user that was initially spent. However whilst many projects start off well, too often they fail to account for the possible success and the likely growth of the system and environment.

To budget successfully, users should consider the following items:

- Cost of all the items necessary to install and run the learning management system including software, hardware and all related services
- The costs of any data migration and integration with external systems, particularly HR systems.
- Costs of all other items that might be necessary to reach your learning goals. These might include authoring tools, simulation tools, assessment tools etc.
- Updates should also be planned for. That should include updates of hardware as well as the LMS itself.
- Support and training costs - both internal and external.

Real success in budgeting and for the project as a whole will come with effective long term budgeting, ensuring that it is possible to effectively scale your system.

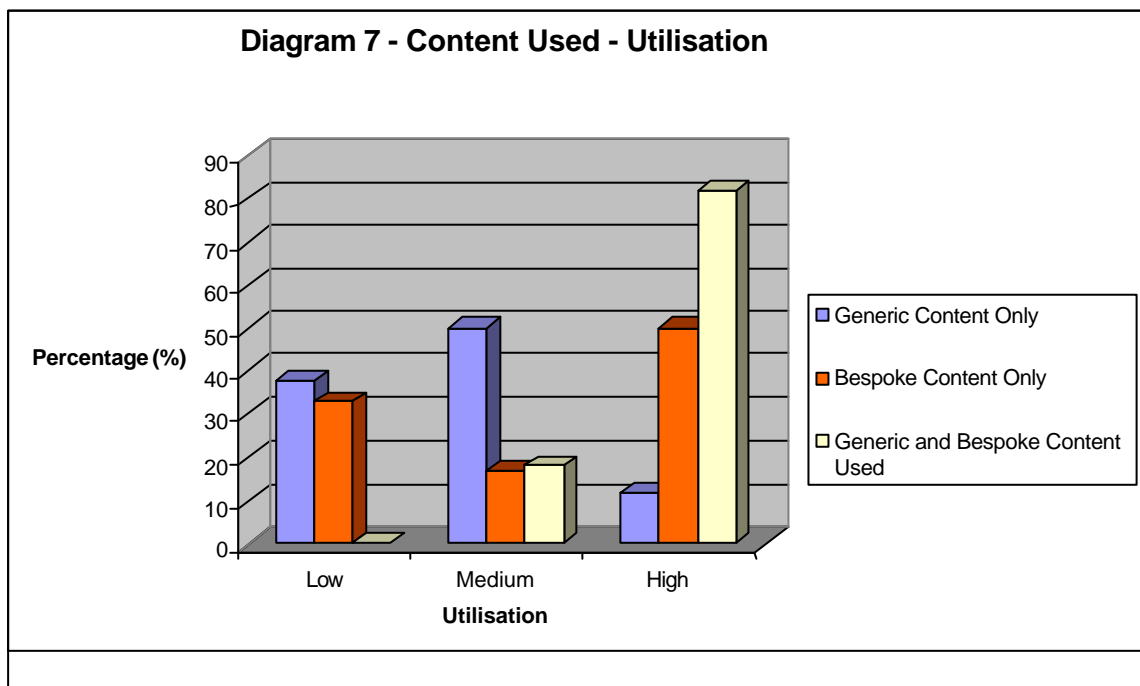
7. Start with content

Many observers believe that an LMS is only as good as the content it delivers. But it is equally true that a poor LMS with great content is still a poor LMS. Nevertheless, one of the great benefits of the system is its ability to deliver content to the right people at the right time. Providing your content is AICC or SCORM compliant, most LMS's couldn't care less whether your content is created in-house, bought generically 'off-the-shelf', or developed specifically by a bespoke content provider. Each method of creating content has its merits. But it is worth considering what you want to achieve with your content solutions and which methodology may be the most appropriate. To that end, you should refer to the learning goals that you have established for your LMS:

² Bersin, March 2005.

- If your learning goal is generic in nature (e.g. to enable employees to understand more about health and safety laws, discrimination and accessibility or Microsoft Office training), your needs will probably be best served via generic learning content from a popular provider. These packages are frequently tried, tested and proven and relatively good value for money.
- If you are creating a lesson or course which is high value, frequently reusable and may set the scene for your organisation, you should consider a bespoke content provider. A good provider should be able to take your ideas and produce something which will not only be an effective learning solution but also a 'flagship' for your learning system.
- If you have to produce a lot of very company specific training content in a short period, then undoubtedly the most effective solution will be to author it yourself using a rapid authoring tool. Often easy to master, the best authoring tools will help you structure your learning content and even enable you to add existing resources.

An LMS is an integral part of implementing an e-Learning strategy and the delivery of e-Learning content. The kind of content that you choose can have a significant impact on the success of the project. Some clients have been very successful in making catalogues of generic content available. Others have been successful with the launch of a single bespoke course to address a specific business need. But in our experience, where both business driven bespoke content and relevant generic content have been used to support the rollout of an LMS and e-Learning strategy, the resulting outcome is the most successful.



When implementing an LMS and e-Learning strategy, you will almost certainly be changing the way in which people have been learning. Launching with bespoke content is a great way to get people used to accessing training via the LMS. But at the start of your e-Learning initiative, it may be some time before more bespoke content is available. This is where relevant generic content can help fill the gap and continue to support the adoption of e-learning and the use of the LMS.

8. Pilot: use a phased approach - flush out any user, content, technical and support issues.

One best practice issue that has been deployed by a number of e2train clients has been to use a phased approach to introducing an LMS. That means, not making the complete system available to the entire organisation at once. Instead, training solutions and system functionality is introduced in a planned way as and when appropriate.

This can be done in a variety of ways:

- An organisation may start by simply using the LMS to handle some e-learning programmes. At a later date they will bring control of classroom training under the system's umbrella as well.
- The system may be rolled out to a limited number of departments. For instance a retailer using Kaldius LMS first deployed the system by simply targeting stores that already had appropriate technology in place – in effect using the company's limited technology resources to determine the reach of the pilot. As the appropriate network technology was introduced to the other stores, so was the LMS. This kind of 'phasing through necessity' approach not only enabled the LMS to be introduced smoothly, it also provided another business driver for the introduction of the necessary network technology throughout the company.

9. Ensure that you test before going live

Before any system goes live, it is important that you test it thoroughly first. That means testing it in situations that are likely to be more taxing than you anticipate.

Testing will enable you to avoid technical problems before they arise. It will also enable you to establish the right kind of security levels.

Your testing should start as soon as the system is in place. Note that, with most LMS's it should be possible to run your testing without getting in the way of live systems. The pilot will give you the opportunity to discover more information about your system. Specifically:

- Get to know about all the features on your LMS, especially the ones key to your specific learning programmes
- Prove the platform the system is running on by testing the capacity of the servers, the integrity of the databases
- Test the integrity of related software programmes such as content authoring tools
- Test your content and its delivery
- Check out bandwidth issues. These should be tested at every point to ensure that the system can run at adequate speeds during peak usage.
- Make sure you are in a position to answer any questions that you think your trainees may have once they start to use the system "in anger"!
- Prepare any specific instructional information for trainees on your system.

10. Train the trainers (and the users)!

An effective Learning Management System such as Kallidus offers a range of features within the system which will provide business value to more than just the organisation's training administrator. The detailed reporting information can be used by:

- HR staff for personal development information
- Content authors to help them discover what works and what doesn't
- Staff involved with managing regulatory compliance systems
- Departmental Managers
- Senior board directors

It is important therefore that each of these groups of potential users is educated on using the system. Unfortunately this is not always straightforward. As each group of users will be getting something very different from the system, your training must be specifically tailored to their separate demands. Moreover it is not unusual to encounter resistance to learning from these busy groups of people.

Users that have managed this successfully have followed a number of rules:

- Begin early: the earlier users are taught to use the system properly, the less likely that problems will arise.
- Provide one-on-one training sessions to key influencers and users which will encourage them to ask questions and discover the possibilities that are relevant to them.

Encouraging users to take up an LMS

House of Fraser solved its user education issues via a combination of launch packs, posters and user guides. Explains House of Fraser's Leanne Peckover: "As with any change program, one of the biggest challenges in elearning is to get users to accept the concept. To that end we produced a user guide which would act as a 'bridge' for the learners between traditional learning methods (including the guide itself!) and elearning.

The guide provides a reference for Online Learning and runs through:

- The training available to the users
- What courses will benefit them the most
- How to use the Learning Management System
- Accessing the skills and House of Fraser's own modules
- Logging on & off the Learning Management System

fulfil
personal development in House of Fraser
Online Learning

Your Guide to Learning Online



Concluded Leanne: "Once the learners realised what was available to them and how easy it was to use the system, their fears vanished. Today House of Fraser staff are extending their own learning programmes on their own initiative."

One of the key definitions of success for an LMS must be the successful uptake of the system by the learners. Here, success should be defined as starting and completing courses. Where applicable, it should also be possible to demonstrate how effective the elearning programmes were.

One of the best ways of ensuring that this takes place successfully is to ensure that the users are fully educated on the system itself. That means:

- Properly marketing the system in the first instance
- Ensuring that all who are scheduled to use it understand all the features on offer (via training programmes)

Marketing the system might include:

- Seminars on the general use of the system
- E-learning courses developed especially to instruct on the system
- e-newsletters to users
- Posters
- Mouse mats
- Internal competitions

Generally the advice is that a variety of solutions should be deployed rather than just relying on a single tactic.

11. Support your users

Once the users are on board, it is tempting to think that you need do no more. But to ensure that the system continues to grow and gain further support it is important to provide ongoing support to your users. Good quality support will ensure that people use the system more effectively. Users will be able to focus on enhancing the learning process and its enhancement rather than worrying about the complexities of using a piece of technology.

One of the most proven ways of managing the support function is to adopt a tiered approach where each level provides a different function and type of support. For instance:

- First level support would answer general questions such as recovering user names and passwords or how to navigate the course structure
- Second level support may provide support for more technically demanding issues such as support for administrators who wish to get more detailed reporting information
- Third level support might deal with technical issues which may need referring to the LMS provider in conjunction with IT staff.

This support solution means that both the administrators and users time are deployed most effectively – system administrators won't have their time wasted on answering training and usage questions. Instead they will be allocated more resources to ensuring that the infrastructure is running smoothly.

12. Maintain your success

Having successfully implemented your LMS, the same principals can be used to maintain the system's success. One of the most popular ways of continuously improving the systems is to add solutions in a strategic manner – picking off the most pressing or suitable training requirement and implementing it according to the same rules.

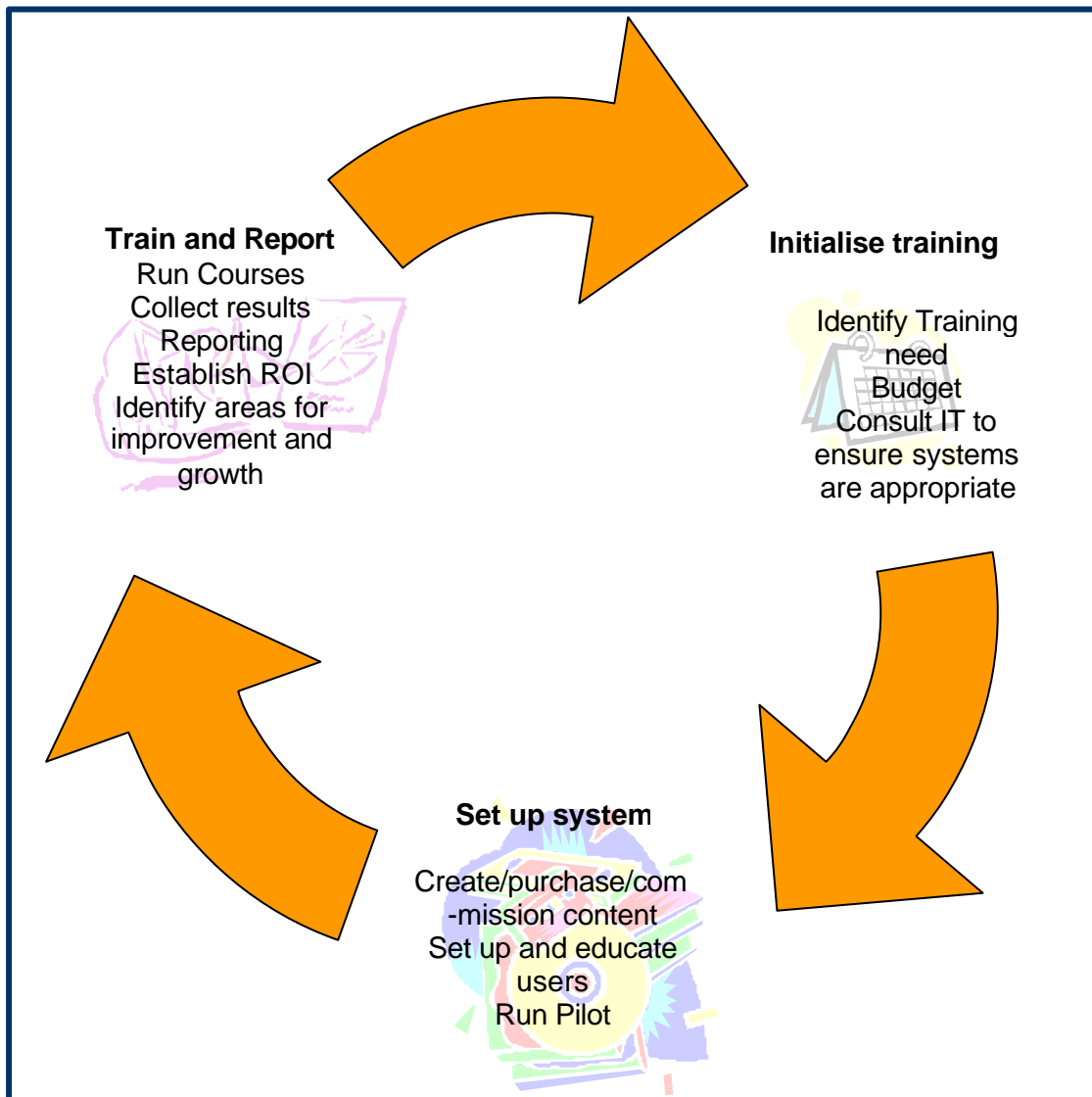


Diagram 8 – Maintain your success

Summary

Although implementing an LMS is not the most difficult task in the world, occasionally, organisations do get it wrong. This is sad because there is a remarkable correlation between those organisations that implement easily and successfully and the steps that they take to achieve that.

A properly implemented Learning Management System can provide real business benefits and a genuine return on investment³. Many software organisations would have you believe however that, to achieve this, corporations must jump through hoops and utter strange chants late into the night. This isn't true. None of the preceding 12 points that have been outlined are beyond the capabilities of the vast majority of organisations. Having a clear business need, assigning a project leader, getting IT involved, getting good content, planning, budgeting, piloting, testing and training are all simple and logical steps to take. Steps that, if properly executed will enable your training operations to prove their worth to the organisation.

³ For more information on ROI, see our white paper 'The Business Benefits of Introducing an LMS' available from the e2train website (www.e2train.com).