Research Brief

Replacing your LMS?

By **Stacey Harris**, *Vice President, Research and Advisory Services*

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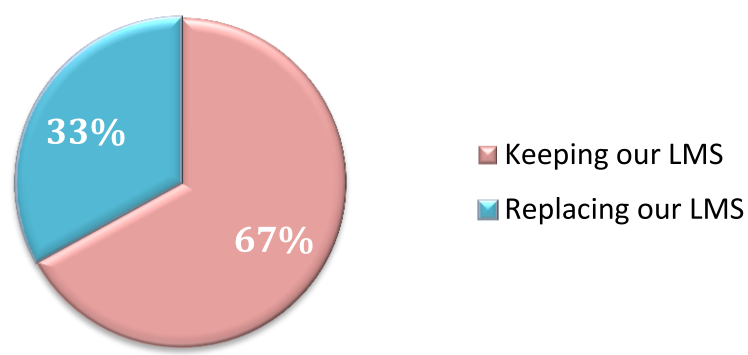
Introduction

Since the first Learning Management Systems were implemented in the early 1990's, learning organizations have been on the necessary path of regular technology upgrades. In a recent Brandon Hall LMS trends survey, over 78% of organizations reported using a Learning Management System. Of those organizations, over 33% of them stated that they were looking to upgrade and replace their current technology.

Figure 1: What are your current LMS plans?



Brandon Hall Group, LMS Trends Survey N=207, 2011

Most organizations look forward to a learning technology transition with a mixture of dread and optimism. It is often a great opportunity to increase learning capabilities, and create a better learning environment. But, organizations also question if they can make a solid business case for the change. Will the transition impact business processes or mission critical learning needs? Will the new technology create governing challenges or highlight gaps in data structures?

In this paper we will review the key practices in helping organizations not only reduce the fear of making a transition, but prepare for a positive experience and enterprise success.

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Start with a Plan

Selecting and implementing a replacement learning technology should be taken very seriously, if not more seriously than the original LMS implementation. With an original LMS implementation, an organization is often starting off with a limited amount of existing data, content, standards, or even stakeholders involved in the process. They usually start small with a few minor test programs, and expectations are limited.

When replacing an LMS, an organization has considerably higher levels of expectation, and the overall impact is usually enterprise wide. An organization has years of data and content creation to manage and transfer, as well as numerous governance groups and stakeholder inputs to include in the process. Additionally, they may have multiple third-party tools that they are leveraging to conduct assessments, content creation, and video-conferencing – tools that play an important role in meeting their learning needs.

Having an extensive and clearly communicated plan is the number one indicator of a successful LMS transition. Many organizations separate the plan into two elements, the selection process and the implementation process. Our research has found that a successful technology transition integrates these plans to ensure that solution providers are viewed in terms of both what the system can provide and the transition services they can offer.

Use Migration Framework

A migration framework is a tool that maps out the critical elements and their risk factors within the larger learning technology transition plan. These elements usually require their own individual plan cycles, timelines, and sub-committee focus. Preparation and partnership on these elements with the selected solution provider are critical for success.

As seen in Figure 2, a migration framework includes multiple planning areas, and highlights possible risks in the transition efforts. Each organization may identify different risk areas, depending on their size, scope, IT structure, or long term strategy.

Figure 2: Sample Migration Framework

Planning Areas	Risks
System Integrations	Logins, connections, competing data structures
Structure and Domain Setup	Multiple domains, multiple levels, multiple roles, multiple rules
Content/Data Transfer	Data mapping, data cleaning, content ownership, content portability

Globalization Setup	Languages, financial data, government regulations
Reporting and Security	Historical data, permissions, business integration
Administration Changes	Admin selections, training, communications
End-User Changes	Access points, change management plan, support tools
Stakeholder Changes	Governance models, business impact

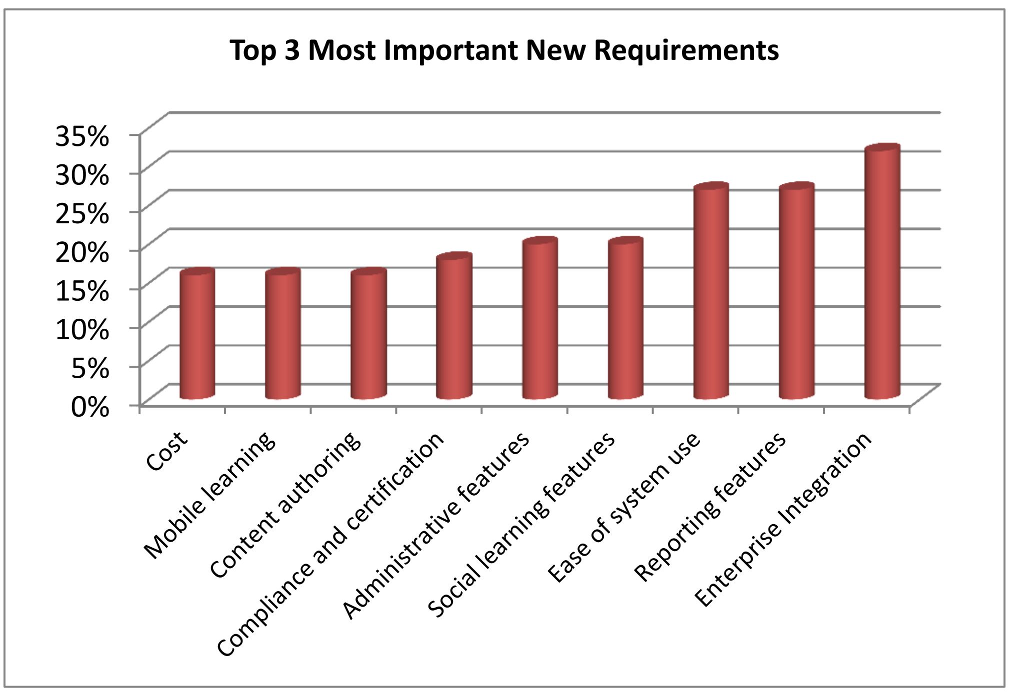
Source: Brandon Hall Group, 2012

The highlighted risks are points at which the transition process could fail or be managed poorly. It is here that organizations should spend considerable time.

System Integrations

Of the 33% of organizations in the LMS trends survey who stated they would be replacing their current learning management system, over 32% noted that one of their top three new requirements was to acquire better enterprise system integration capabilities. The next two requirements were better reporting features, and ease of use.

Figure 3: Practical Learning Design



Brandon Hall Group, LMS Trends Survey N=207, 2011

Enterprise integration falls into two categories, learning related tools and business system tools. Learning related tools include support tools that are often separate but need to work in conjunction with a Learning Management System, such as assessment builders, video-conferencing tools, and content builders. Through acquisitions and aggressive feature development, many LMS's have begun to offer "Unified" learning platforms that pre-integrate or include these previously missing support tools inside the LMS. In purchasing a unified platform, learning organizations can provide an end-to-end learning experience for their learners. This positive end-user experience is major value proposition for enterprise integration in learning tools.

The second category of enterprise integration is business system integration. Today this goes beyond the traditional employee payroll system, and now includes requirements to integrate with enterprise resource planning systems, e-mail tools, sales platforms, marketing platforms, intranets, and a multitude of unique business platforms. Some organizations are also looking at connecting their learning platforms to social environments such as YouTube, Facebook, or Twitter to access unique and dynamically generated content.

All of these integrations require an organization to have a plan for mapping security requirements, login codes, shared field names, and content access across the multiple systems. The goal of integration efforts is to make the end-user experience seamless, no matter how complex the actual back-end mapping requirements.

Key practices for preparing for system integration efforts include:

- Defining both current and future system integration requirements.
- Getting to know the selected solution providers experience with integrating each of these elements.
- Defining what data needs is between systems (now and future).
- Defining how often shared items need to be updated.
- Defining the value or business goal of each connection.
- Mapping data table to data table, understanding where the data resides and how it maps to the integrating systems.
- Prioritizing each connection and defining required integration efforts for top priority items.

Structure and Domain Setup

All organizations, whether they are small or large, deal with structure and domain setup issues when transitioning data to a new learning management system. Organizational data is rarely clean, and complex organizations often face multiple domains, multiple levels, multiple roles, and multiple security rules that go across each area of an organization. Depending on the system, this setup effort may define factors such as who can access what content, what reports and data will be viewable by certain groups, and who has access to change these rules.

Large complex organizations such as Yum! Brands, with over 400,000 users and over 2 million course completions in a single year, need more than just a plan to effectively re-setup an entire organization correctly in a new system. They often require special tools and programs to help them accomplish and validate the move.

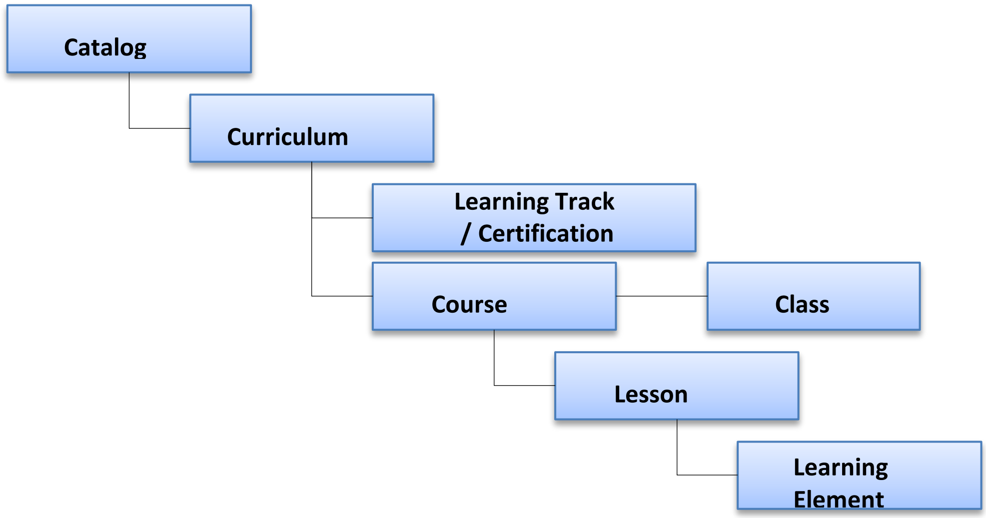
Key practices to managing the structure and domain setup in an LMS transfer include:

- Identifying all audiences tracked and managed within the LMS today and those that may be tracked tomorrow, such as franchise or external organizations.
- Identifying required data for each audience.
- Identifying where each group fits in the hierarchy or group structure.
- Identifying classifications given to audiences or groups.
- Identifying branding, sharing, and reporting needs between groups and roles.
- Mapping out multiple scenarios for multiple branding, sharing, and reporting needs.
- Working with the solution provider to test multiple scenarios.

Content and Data Transfer

The primary role of a learning management system is to manage both content and user data. This includes course names and user histories, as well as multiple levels of content and data taxonomy. Taxonomy is the science or approach an organization takes to classifying things or concepts that have some relationship to each other in the learning management system. An example of a standard content taxonomy can be found in Figure 4, where content is classified into multiple levels and a hierarchy that creates a method for accessing and cataloging the information so end-users can use the information appropriately.

Figure 4: Example Content Taxonomy



Source: Brandon Hall Group, 2012

Taxonomies also apply to other data elements in a learning management system, such as audiences, activity history, or locations. For each taxonomy, a set of rules and guidelines have been developed, either through industry standards such as SCORM[1], government requirements such as HIPPA[2], or internal governance such as content governance bodies. An organization needs to identify who owns these taxonomies, how flexible or critical the standards are for an organization, and how they will be implemented in the new LMS.

Key practices to manage the content and data transfer processes in LMS transfers include these tasks:

- Assess and map taxonomy for all current content; including items such as active use and master locations.
- Assess and map taxonomy for all current data elements; such as user activity and structure.
- Identify realistic content and data standard requirements and owners.
- Partner with the solution provider to communicate all standards, and discuss any risks for challenges with the transfer of data.
- Build or review data and content migration scripts, validation scripts, or manual processes.
- Work with your internal IT partners and solution providers to Test, Test, Test.
- Conduct several rounds of validation after all information has been transferred.

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[1] http://en.wikipedia.org/wiki/Scorm
[2] http://en.wikipedia.org/wiki/HIPPA

Global/International Setup

Many organizations look at the requirements for a global or international learning community as simply an issue of language translation. In reality, preparing an LMS for an international community can be far more complex, and includes the need to understand government laws, financial markets, and regional IT infrastructures.

If the learning technology transition is allowing an organization to now expand to a global audience for the first time, the organization needs to consider language, currency, government standards, internet infrastructure, and cultural norms for each individual region from which learners will be accessing the technology. For example, if e-commerce payments are gathered from 40 different regions, what are the standards for rolling those payments into aggregate figures for enterprise learning? If an organization is transitioning an already existing international community, then they may also need to understand data transfer laws, individual government requirements for training record storage, and any customizations regional groups may have made to taxonomy or organizational structure standards.

Key practices to managing global and international setup with a learning technology transfer include the ability to:

- Identify current and future regions of business.
- Work with the regional HR community to gather regional government requirements and standards.
- Identify cultural considerations and taxonomy standard changes with solution providers.
- Work with local and international IT departments, as well as the solution provider, to identify and test options for data storage, transfer speeds, off-line capabilities, and security backups in critical international regions.
- Work with international governing communities to confirm global standards to which the specific organization will adhere.
- Confirm and test all settings with the global community.

Reporting and Security

As seen in Figure 3 on page three, over 27% of organizations listed better reporting features and functionality as one of the top three most important requirements for their new LMS. Most organizations select an initial learning management system based on features and functionalities and its ability to automate manual processes. On average, by the third year of use, most learning leaders will agree that the most critical asset of a learning management system is its reporting capabilities.

A system's reporting and security settings provide immense amounts of decision making information for organizational leaders. If managed appropriately, reports can clearly define a company's learning compliance level, gaps in skill development by function or region, or opportunities for talent mobility. When managed poorly, a lack of reporting functionality can lead to an area of real frustration for learning leaders, stakeholders, and end-users that are unable to view the information they need to make better business decisions.

Key practices for preparing a new LMS to better manage reporting and security needs include:

- Identifying all current reports and assessing their use.
- Validating the relevance of these reports and their continued value.
- Identifying reporting gaps (business needs not being met).
- Assessing new solution provider reporting capabilities and dashboards for their ability to address reporting gaps.
- Re-thinking security requirements versus security norms.
- Identifying opportunities for transparency and openness.
- Producing sample reports and verifying format, layout, location, schedule, and drill down requirements before final configurations.
- Regularly assessing reporting value.

Audience Preparation

Finally, never underestimate the importance of preparing your various audiences for a learning technology upgrade. Even if an organization has limited access and may have a less than popular view of a current learning technology, they will have built a set of expectations and perceptions about the new technology that need to be addressed.

As seen in Figure 5, three key audiences to plan for include the learning technology administrators, learning end-users, and learning technology stakeholders.

Figure 5: Audience Preparation Table

Administrators	End-Users	Stakeholders
Communication Plan	Communication Plan	Communication Plan
Login Review	Login Review	Login Review
Reporting Assessment	Reporting Assessment	Reporting Assessment
Assessing Use/Role	Assessing Use	Meeting Schedule
Training Plan	Training Plan	Decision Schedule
Support Plan	Support Plan	

Source: Brandon Hall Group, 2012

Each of these audiences requires their own separate strategy for communication, access standards, reports, usage reviews, training, education, and on-going support. If this area of the transition is not handled well, it will not matter how good the technology is or well integrated the systems are – the perception of the system will be less than positive. Leverage your solution provider extensively in this area, partnering with them to provide valuable communication throughout the process.

Conclusions

The advent of the learning management system has given learning organizations the ability to reach a multitude of audiences across the globe. These systems are the tools that allow organizations to roll-out new product training to thousands of employee's simultaneously and provide individual learning for a single IT professional with a skills gap in Bismarck, North Dakota.

There is no doubt that the new features and functions available in todays' learning management systems are amazing, and can make organizations feel like a different solution provider will solve all of their current problems. In reality, a positive experience also requires a sound partnership between the solution provider and the learning organization. This partnership must be based on an open dialogue concerning the risks and benefits of each step an organization takes when planning a transition effort. Key strategies for success include:

- Ensuring solid business drivers for the upgrade plans and strategies.
- Ensuring the selection process is as diligent this time around as it was the first time around – based on a vision of the future learning needs.
- Ensuring all the right questions are asked of each solution provider; not only questions on current system capabilities but their experience in supporting transition efforts.
- Creating a migration framework specific to the risks and opportunities faced by an individual organization in the transition process.
- Communicating plans clearly and often; to solution providers, stakeholders, and end-users.

The time invested in preparing and planning for a learning technology transition will pay off with a solid solution provider relationship and realistic stakeholder and end-user expectations.

Research Brief

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