

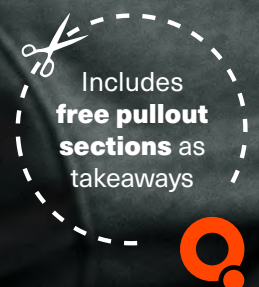
An expert guide to

SOURCING A LEARNING SYSTEM



thinkoi

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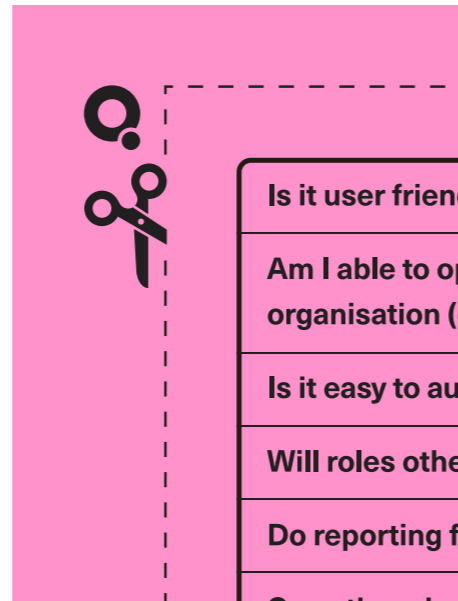
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We've included handy pull-out sections to take with you, ask questions and make notes when looking for a system.

Look out for the  icon.

01

Welcome

Sourcing the right learning system is no easy task.

With so many options, all using different terms and touting different features, it's easy to become overwhelmed by a dizzying array of flashy features, disruptive technologies and huge promises.

57% of L&D practitioners agree that 'working smarter' involves working on the right priorities for the right people in the right way.

Source: CIPD, Learning at Work Report 2023



With so many options on the market, an increased workload, and pressure for tangible results, it's tempting to invest in a solution without ensuring it addresses all of your organisation's challenges.

Does a learning system give you a competitive advantage?



Your learning system is a strategic investment – and while the right choice can help you upskill your workforce and provide an impressive return on investment (in fact, **72% of organisations report gaining a competitive advantage through use of a learning management system¹**), the potential losses incurred by getting it wrong can weigh heavily on any L&D manager's shoulders.

¹ Source: TowardsMaturity & eLearning Industry

It's no wonder you're feeling the pressure.

However, by asking the right questions and gaining a full understanding of your organisation's unique requirements, you can begin to uncover the right choices for you.

To help you get it right first time, we've put together the ultimate guide to sourcing a learning system.

02

Learning outcomes

Any good learning activity should have clear learning objectives. Here's an outline of what you should take away from this guide.

By the end of this guide, you'll be able to:

01

List

the key challenges you want to help your organisation to overcome.

02

Describe

the critical criteria to look for in a quality learning system.

03

Formulate

a suitable plan for boosting stakeholder adoption.

04

Analyse

the benefits of different features according to your organisation's unique needs.

03

What kind of learning system do you need?

Before investing in learning technologies, what do you need to know? Well, let us provide an overview of what's available and what might work best. Is the traditional **learning management system (LMS)** really dead? Is the **learning experience platform (LXP)** the learning technology of the future?

LMS LXP



Let's take a closer look at each one.

The LMS

With its ability to create, manage, track and deliver online corporate courses, the LMS, has long been seen as a bastion of the old-world learning order. For example, an LMS might be used in order to assign induction training courses to new employees, so that progress can be tracked and learning retention assessed in a scored test.

However, in recent years, there's been debate over whether the LMS has become redundant in light of the rise in personalised, adaptive delivery that's so intrinsic to modern learning.



Is the age of the LMS well and truly over?

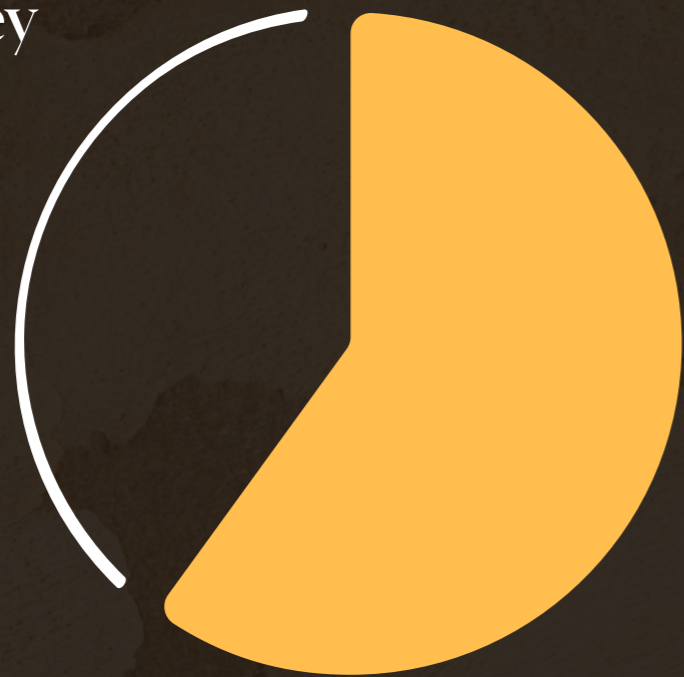


...perhaps not yet.

Despite the fact that modern learners are now gravitating towards more learner-led, rather than administrator-driven learning experiences, the LMS still serves a purpose in delivering compliance training, hence still enjoys widespread use. To put this into context, the Annual L&D Benchmark Report 2023 revealed that:

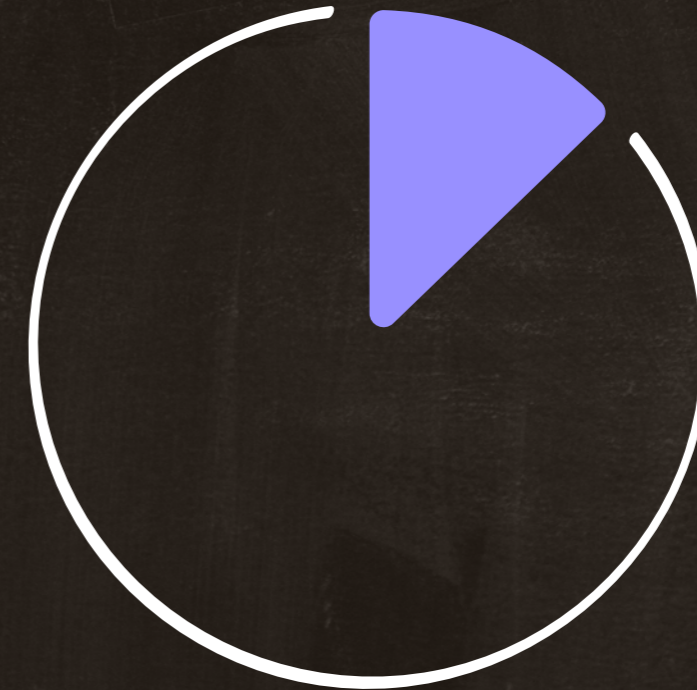
65%

of respondents stated that they use an LMS within their company.



...however, only
13%

are looking to adopt it within 12 months.



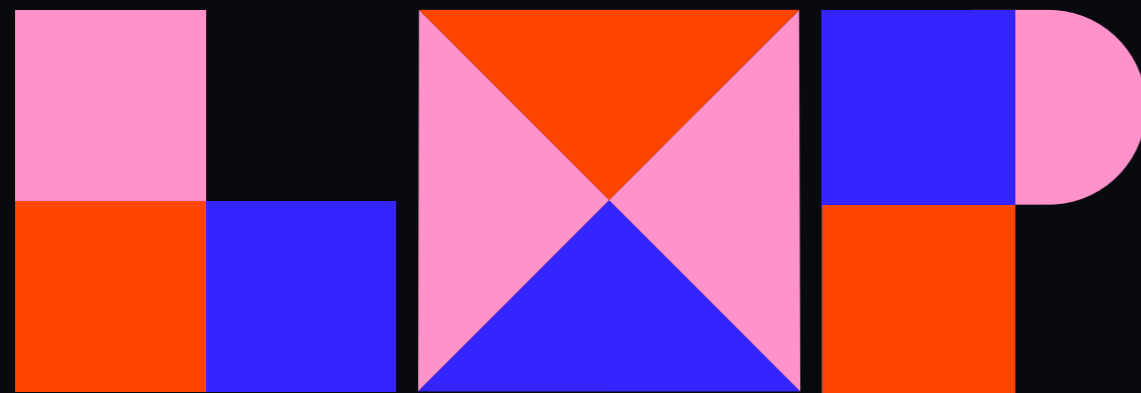
What this tells us is that while the LMS still has its place, the traditional LMS is by no means future-proof as new learning technologies continue to emerge.

The LXP

According to world-renowned industry leader Josh Bersin, the LXP market “exists because the paradigm of the LMS is out of date²”.

Think about the sort of content you engage with on a daily basis: for example, entertainment. When you log in to streaming services such as Netflix and Spotify, you’re presented with a wealth of personalised options based on your preferences and activity history. The content has already been curated based on your interests, allowing you to select from the most relevant categories without having to waste time wading through countless options yourself.

Now imagine you could log in to a learning system and find the most relevant content at the touch of a button without hours of searching. Imagine selecting your preferred form of content, such as: articles, blogs, videos, podcasts and micro-learning.



² <https://joshbersin.com/2018/09/the-learning-experience-platform-lxp-market-expands/>

Imagine a learning journey that puts the learner in control. Curation and user-led experience is one of the key capabilities of the LXP that make it arguably more suited to modern learning than the traditional LMS.

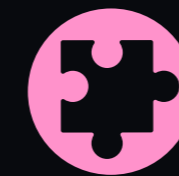
Other benefits of the LXP include:



An open system to accommodate external resources



The ability to track learning outside of formal situations (with the help of xAPI)



The ability for users to contribute their own content



The ability to track soft skills (or 'intangibles')



Adaptive learning paths



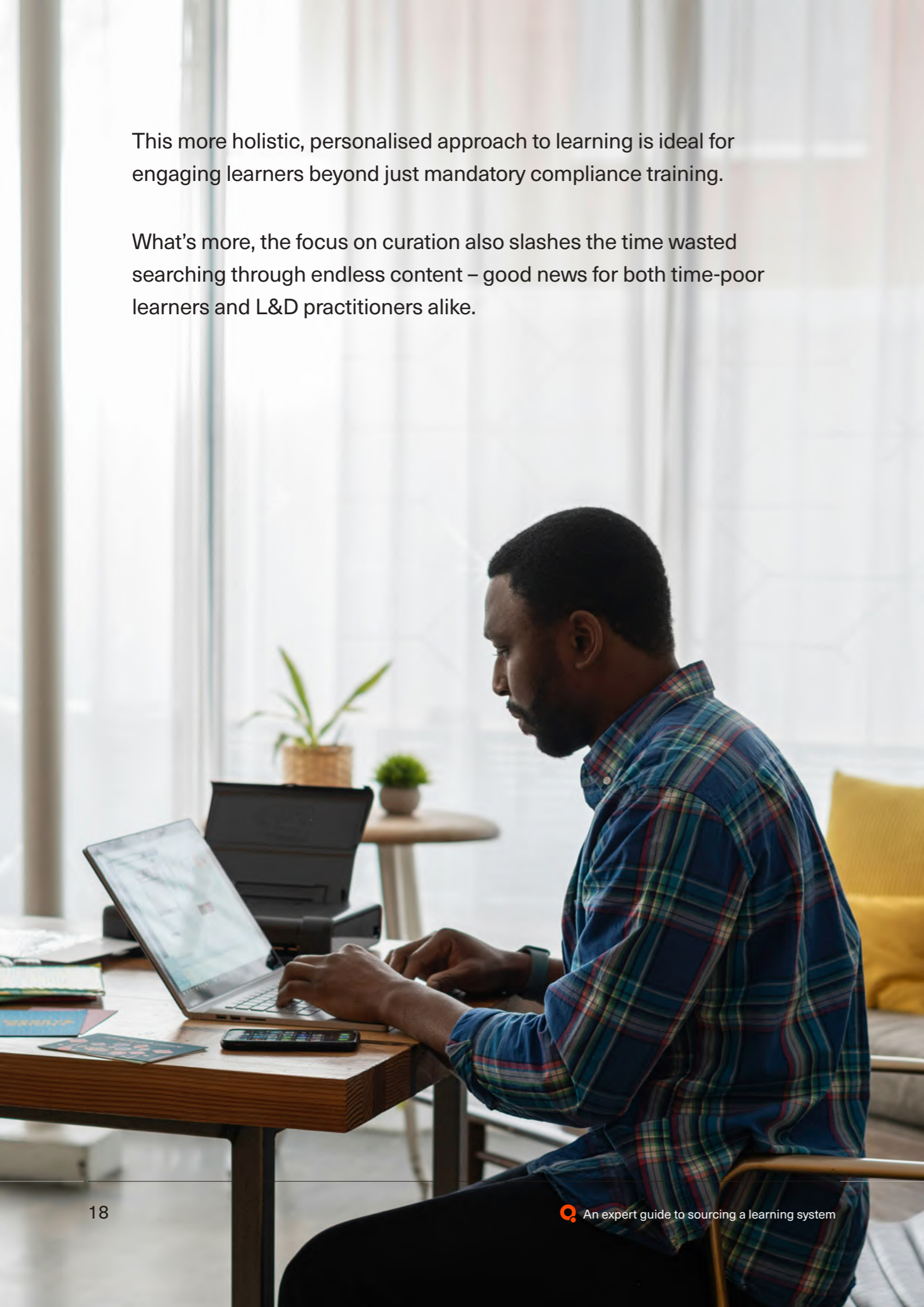
The capacity for unmarked, practice assessments



Discussion spaces for collaborative learning and coaching/mentoring

This more holistic, personalised approach to learning is ideal for engaging learners beyond just mandatory compliance training.

What's more, the focus on curation also slashes the time wasted searching through endless content – good news for both time-poor learners and L&D practitioners alike.



The result?



**More money saved and
more time spent learning.**

Is the LXP better than the LMS?

Not so fast.

The key difference between the LXP and LMS is that the LXP focuses on putting learning experience first, whereas the LMS is based upon learning management. But remember, there are times when we do still need formal learning management. Compliance training isn't going away anytime soon.

This only makes that painstaking decision between LXP and LMS more difficult.

But what if you didn't have to decide?

What if you could have a learning system that was built upon the foundations of the traditional LMS but also integrated the enhanced capabilities of the LXP?

With new, integrated learning systems, we now have real, proven solutions that are perfectly suited to modern learning.



Your next challenge is to find the right vendor.

This means asking the right questions.

04

Questions to ask before buying

Before committing to your choice of learning system, there are several questions you should ask to decide which one is right for your needs.

Before you even continue with this guide, there's one question you should be focusing on.



Question 1:

“What challenges can I expect a learning system to solve for me?”

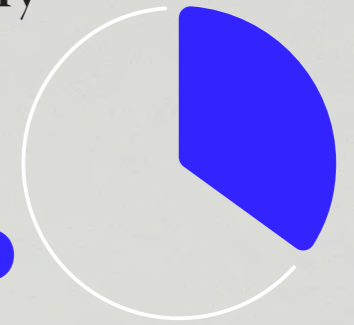
Without being clear on the organisational goals you want a learning system to help you achieve, it's going to be near-impossible for you to convince stakeholders or fully consider the pros and cons of different options according to your unique organisational objectives.

Ensure everyone is clear on your objectives and start by going beyond your department, ensuring you're speaking the language of each of your stakeholders. Gather feedback from learners, stakeholders and any other relevant people.

In high-performing organisations, success is a team effort.

Only 35% of L&D teams regularly review their programmes to check that they support the organisation's goals.

35%



Source: YouGov and MindTools, Turning Pressures Into Opportunities: Leadership Report 2023

Remember...

...your technology will serve as a tool to help you achieve success and should not be seen as the overall solution.



Before exploring your options, create a requirement list for the new learning system. Your organisational objectives will help you decide what you need the technology to do.



Remember!

The ability to link performance and improvement to learning programmes (via an appropriate **talent and improvement framework**) and understanding the appropriate pedagogy for achieving these goals should be the number one priority **before** engaging with suppliers.

Think about what you want your business to achieve. The learning should be aligned to business objectives, and the right supplier will have the right analytics, and the right customer success support to align the learning to tangible outputs.

For example, the aims of your organisation could be as follows...



TARGET:

Increase retention of staff

What is the percentage?



TARGET:

Increase retention of customers

What is the percentage?



TARGET:

Improve sales growth

What is the percentage?

Question 2:

“My stakeholders know what’s needed, right? I’ll ask them.”

Not necessarily.

While stakeholder collaboration is indeed an essential skill for any modern L&D professional, and you’ll most certainly want to align your plan with the overall needs of the business, just asking your stakeholders to research their top requirements risks **‘groupthink’** occurring.

Your approach shouldn’t ask stakeholders to prescribe the solutions, but to represent their challenges.



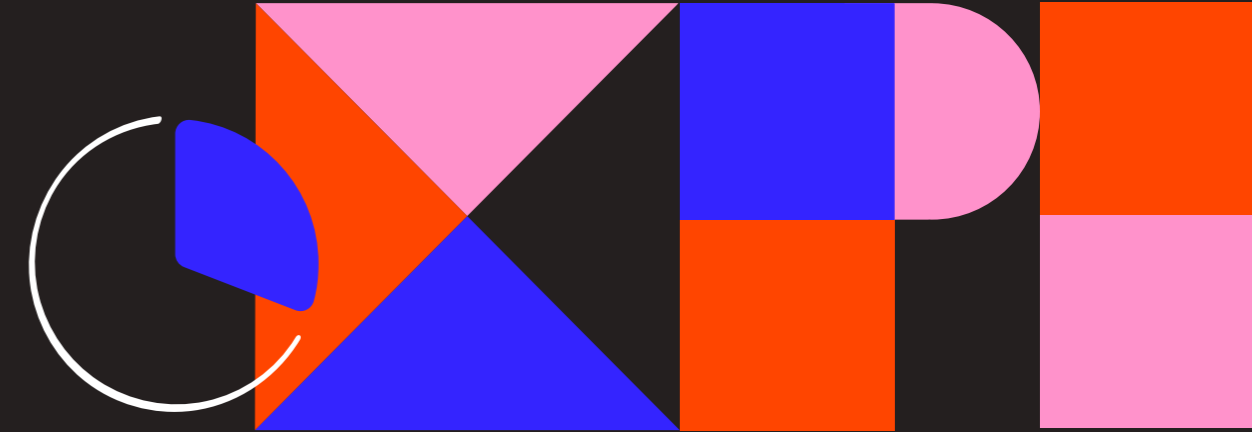
You can add these challenges to your list of requirements to further help find the most tailored solutions.

Different stakeholders will have different challenges. Here are some examples.

Your business leaders

How often do you interact with your business leaders? Does communication with your business leaders inform your strategy?

A survey by YouGov found that only **27%**



of L&D managers work with senior leaders to agree on business metrics and key performance indicators (KPIs) for L&D.

Yet, in that same report, organisations with a learning and business strategy aligned to these goals are more than four times as likely to report:



Increased revenue



Improved productivity



Improved staff engagement



Improved staff retention

Source: YouGov and MindTools, Turning Pressures into Opportunities Report, 2023

Perhaps your business leaders want to see staff productivity improved by 50% or a 60% growth in sales. They'll want to see clear evidence that your learning strategy is working. Make sure you're clear on the business impact that they are seeking and consider how implementing a learning system can play a part in achieving it.

Once you're aware of this, build a business case for a learning system, justify the budgets and present the potential for return on investment. You need to ensure your business leaders can see evidence outlining *why* a learning system is needed.

Stuck on what and how to measure? Here are some common examples...

| Successful goal | Measurement |
|---|--|
| Return on investment | <i>Achievement of business objectives (e.g. user retention, engagement and growth)</i> |
| New/existing users achieving consistent success and increased engagement | <i>User net promoter score (NPS) and/or feedback</i> |
| Usage of the learning system and engagement with additional services | <i>Measurable ROI</i> |
| Reduced skills gap and greater clarity on business succession planning | <i>Talent/competency mapping</i> |
| Improved on-the-job (OTJ) performance | <i>Business intelligence and performance attribution</i> |

Your line managers

Line managers translate policies into day-to-day practices and are the familiar face your staff will associate with people management and work allocation. It's your line managers who play a key part in the learning transfer process and helping learners create behavioural change post-learning.



Research shows that

78%

of learners say support from managers is essential or very useful to learn what they need.



Source: Towards Maturity's report, The Learner Voice: Part 3

However, a report by CIPD found that only

36%

of L&D leaders stated that line managers support their team to transfer what they learn back into the workplace.



Source: CIPD, Learning at Work Report, 2023

This needs to change. And to change this, you need to get your line managers involved from the very beginning when looking to implement a digital solution. What challenges might they be facing?

Line managers are busy people. Easy access to the learning profiles of their staff via a learning system, along with detailed learner reports, could make preparation for one-to-one meetings and performance meetings less of an administrative headache. You should be prepared to explain how having such detailed visibility of learner activity will mean that they are able to reward and encourage these behaviours in the staff they manage.

| Successful goal | Measurement |
|--|---|
| New users enrolling on and completing onboarding sessions | <i>Learning system enrolment and completion data</i> |
| Engagement of the existing audience with the learning system and regular completion of refresher training, tailored to requirements | <i>Achievement of onboarding milestones</i> |
| Tracking of learner progress | <i>Existing audience enrolment (%)</i> |
| Meaningful data to support coaching sessions | <i>User NPS / feedback</i> |
| A positive, engaging and enjoyable learning experience for staff | <i>Repeat active login</i> |
| Easy onboarding of new hires | <i>Reports for line managers to see how learning takes place most organically (e.g. self-directed, prescribed, via email)</i> |
| Data for line managers to focus their employees time to develop an individual/ collective learning culture | <i>Heat maps to show when learners are active and what they naturally gravitate towards</i> |

Users *(admins and learners)*

Of course, you can't consider your list of challenges complete without considering those faced by the people who will be using the system for their own learning.



What do modern learners need from a digital learning experience?



The early days of e-learning didn't see technology being used to its full potential; it only moved the standardised, static old methods of learning onto a digital platform. Employees were still away from their jobs for long periods of time completing assessments and reading through content, only this time in front of a screen.

What do both learners and admins want and expect from a learning system?

Admin



"I want something quick and simple to set up - I'm working to strict deadlines with training!"

"I need features that can save me time on admin so I can focus on the actual training."

"My team needs to be able to maintain and manage the learning system once set up."

"I need to ensure the right people have access to the right reports and insights."

Learner



"I need something easy to access on any device, whenever and wherever I need it."

"I'd like the learning system to show me the learning content that matters to me personally."

"I want to clearly see how to progress in my current role, or roles that interest me."

"I need somewhere I can discuss my learning with peers and mentors - support is important to me."

Your IT department

Don't forget your **IT department** when considering stakeholder challenges.



What potential challenges might they face when implementing a learning system?



Who needs to be trained on the system? Will they require specialised training to use it (and will this be included by the supplier)?



Can it integrate with core parts of the existing digital eco-system?



Does the system (and vendor) adhere to;



ISO 9001/27001 standards



GDPR Regulations



Security Standards

Question 3:

“How can a learning system support a more modern blended approach?”

Organisations are now adopting a more integrated learning approach which blends training courses with workplace-based, informal learning.

Think about your own list of priorities when it comes to the skills you most want to develop in your organisation. What are your top five?



A report by CIPD has revealed that

63%

of L&D practitioners work in collaboration with other functions to deliver business-critical priorities

Are you one of this 75% who want to bring people together on their learning journeys? Often, working through topics with others can provide fresh ideas and perspectives. If so, what will you need to achieve it?



Some key factors include:



➤ *Coaching for employees to become more independent*



➤ *Tools that enable collaboration (this is where an effective learning system such as Thingi can really work)*



➤ *Learning that's measurable in order to inform the curriculum*



➤ *L&D managers who can drive learner engagement*



➤ *Greater use of informal content libraries*

05

Selecting the right vendor

It's all too easy to get drawn in by flashy features and big promises. However, it's learning first and technology second.





The technology should be the enabler for effective learning and pedagogy.

Success in digital transformation is bigger than the learning system and you should be looking for a learning partner who has expertise in both digital transformation and L&D.

Software requirements should be borne out of the challenges the organisation is looking to solve (which is why it was important to make those considerations in the last section).

Anyone who's experienced the buzz of an exhibition hall at an L&D event will know that the sheer range of technology and suppliers on offer can be pretty overwhelming.

How do you know which one is right for you?

There's no need to hide behind the stand of free tote bags in terror. Just keep this one question in mind when dealing with different vendors:

“How can your team and product help me achieve my organisational goals?”

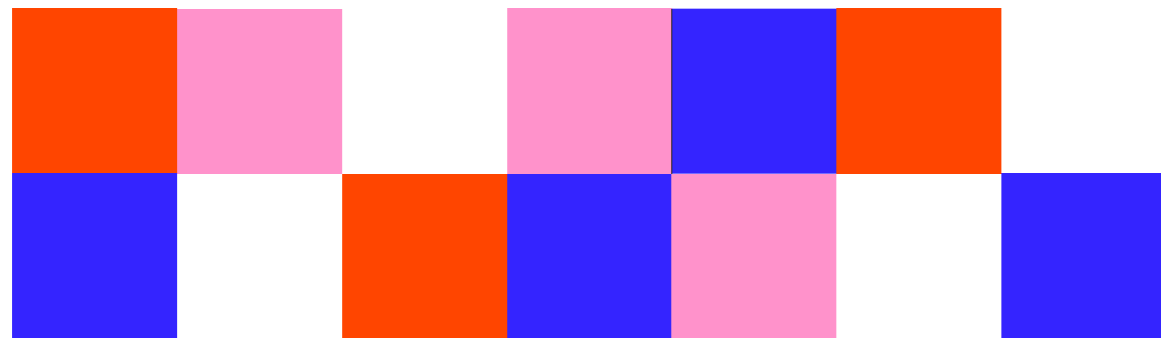
You'll have prepared your list of requirements linked to organisational goals and stakeholder needs in the last section of this guide. This is key to linking your organisation's unique needs with the solutions vendors can offer.

Consider the features carefully

If one of the first engagements with a vendor is a long and impressive-sounding list of features, then you will end up letting the tail wag the dog, so to speak. Remember...

...unless you can get people to engage with the learning, the feature set is largely irrelevant.

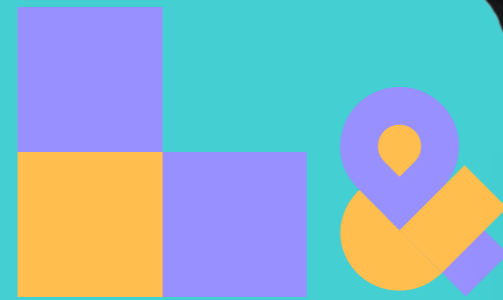
Vendors are sometimes geared to have all of the 'popular' features to tick procurement boxes, but this is meaningless without a focus on how usable the system is for end users, and without the expertise to advise on the best application of digital pedagogy.



Let's explore some examples of common challenges and consider how a learning system can solve each one.



John
HEAD OF L&D



“How can you help me engage my learners?”

John is Head of L&D at a well-known supermarket brand. One of the main challenges for the organisation is the high rate of staff attrition, which they want to reduce by 50%. To remedy this, they want to create more opportunities for career development through training. John needs a learning system that provides a central repository for learning content, which is easily organised for relevance. He also needs the training to be engaging, and for admins and managers to be able to track learner progress. Detailed learner reports, organisational roles, and badges to reward and encourage learner activity can all be of benefit for his needs.

Somrita

TALENT MANAGER



“How can I manage talent and succession?”

Somrita wants her L&D department to become more data-driven in order to develop and nurture talent. The reporting insights afforded by a learning system should allow for an ongoing review process, so that skills gaps can be identified and remedied where needed. When combined with the right communication tools, a coaching dynamic can be implemented to ensure learners are supported throughout increasingly self-led and remote learning journeys. Finally, visibility of learner reports for relevant stakeholders (such as line managers) is important for providing detailed insights prior to performance reviews.



Max

L&D MANAGER



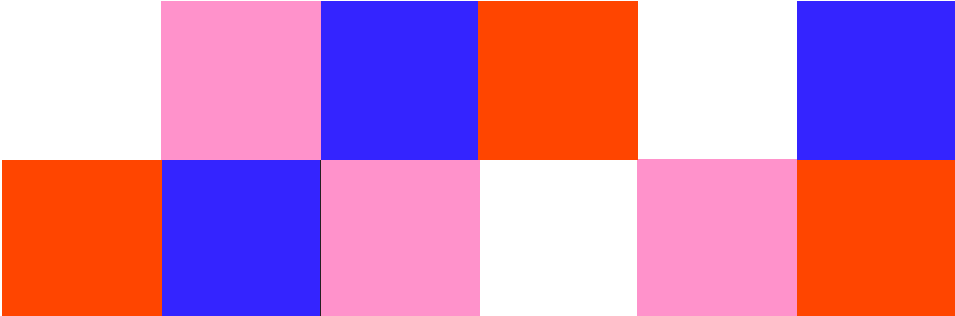
“How can I organise hundreds of trainer-led workshops?”

Max is an L&D manager at a large organisation which provides a significant number of trainer-led workshops. For Max, the right learning system could really help reduce the administration load and give him more time to focus on the most pressing tasks of the day. Max might want to consider a learning system that can help him manage virtual classrooms, record attendance, distribute resources and provide an easy booking tool for trainers.

Why is being standards-driven so important?

What are standards when it comes to learning systems and what do the acronyms mean?

A **standard** is simply an agreed way of doing something. Standards contain specifications or other specific criteria that are to be used consistently as a rule or guideline. An example of this might be health and safety standards in the workplace, with set processes in place to keep everybody safe.



In the context of learning systems, your courses and learning system need to be able to ‘speak’ to each other using a shared language. This ensures learner progress and online activity (e.g. assessment scores) can be recorded.

Let’s take a look at some of the common standards to consider when sourcing a learning system.



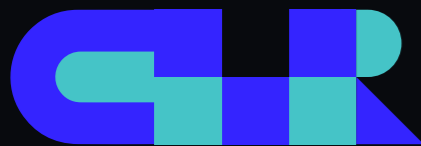
xAPI

This provides a more granular reporting set than older e-learning standards such as SCORM. Some of the most significant things xAPI can enable you to do include designing more readable, qualitative and quantitative progress and score reports. It can also help capture previously intangible behaviours that demonstrate or have an impact on learning.



LRS (Learner Record Store)

This is a portable learner record store, designed to receive, store and return xAPI statements. The LRS is also an essential component in the process flow for xAPI. It's portable nature helps to prevent vendor lock-in.



Comprehensive Learner Record (CLR)

A Comprehensive Learner Record (CLR) standard allows organizations to manage and showcase learner records like courses, competencies, skills, internships, open badges, in a verifiable and machine-readable format.



LTI (Learning Tools Interoperability)

This is used to enable easy integration with different learning tools.



CASE

This is a standard that facilitates the exchange of information about learning and education competencies. It allows applications, systems and tools to access and manage this data.



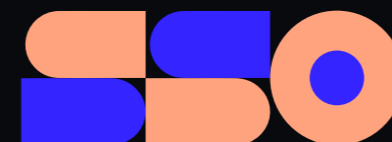
Open Badges

This is a standardised way of verifying achievement. An Open Badge contains data about achievements and embeds this into a visual symbol of accomplishment.



API

API (Application Programming Interface) is a set of protocols, tools, and definitions that allow different software applications to communicate and interact with each other. It defines the methods and data structures that developers can use to request and exchange information between applications from your digital ecosystem.



SSO

(Single-sign-on) - Single sign-on (or SSO) is the process of giving users access to multiple systems within your organisation using a single set of login credentials.

Great digital transformation requires great customer support

While it's important to select the right features and meet the right budget, don't overlook the importance of great customer support when choosing a learning system.

Your unique set of challenges should be addressed by the product and the people from your vendor of choice. They should be working *with you* towards your vision of success in digital transformation, every step of the way.



Don't be afraid to ask the following:

"Who is my Customer Success Manager?"

"Who can I contact on the Customer Support team?"

"Who will be assisting me with onboarding?"

"What are your hours of support?"

"What is the average response time?"

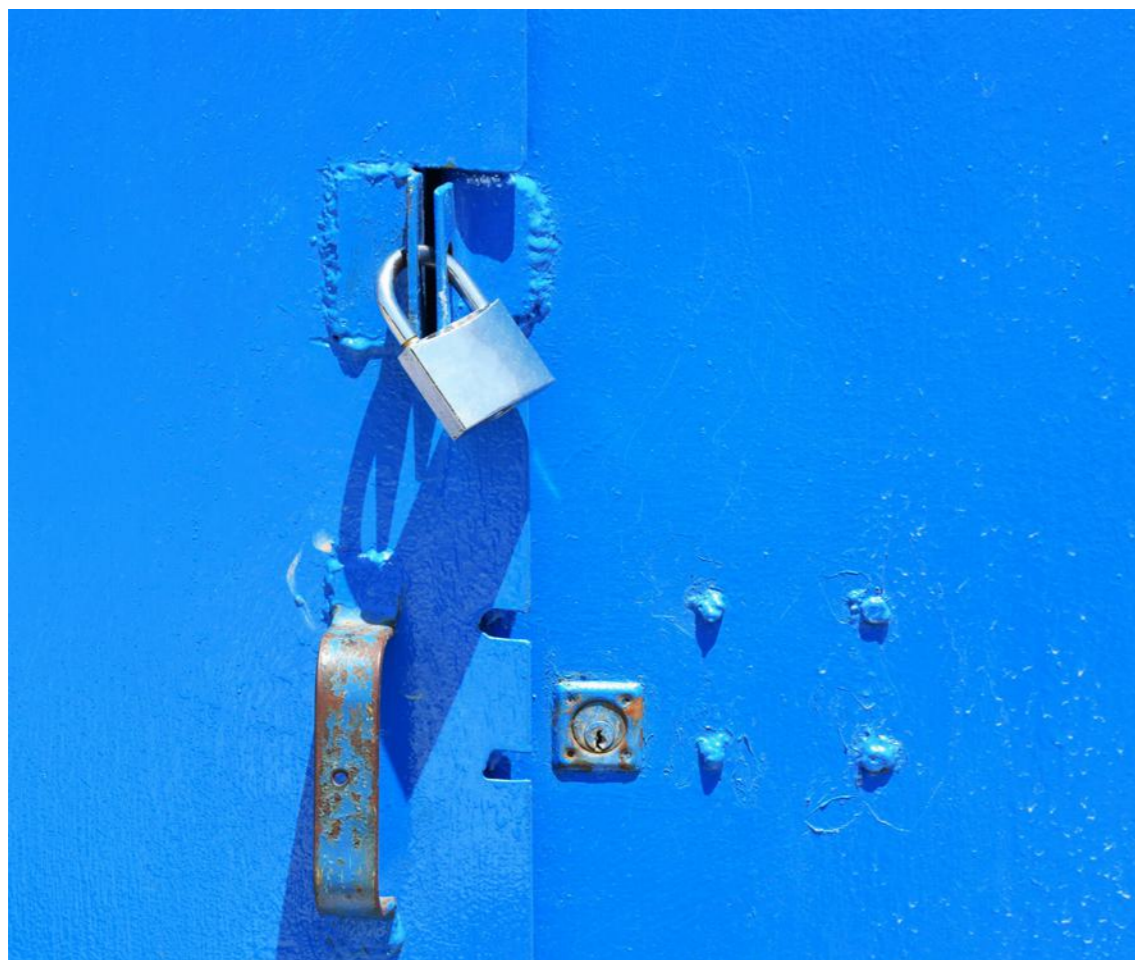
"Which channels of communication do you use?"

"What does training look like?"

"Do you have a training academy?"

"Can I speak to a client who had similar requirements?"

DON'T FORGET TO DO YOUR RESEARCH VIA REVIEWS OR ASKING ABOUT CUSTOMER SATISFACTION RESULTS.



How scalable, secure and reliable is the learning system?

Sometimes, there may be situations which require operations to scale up rapidly at short notice. You may need to accommodate far more learners to meet demand, and it's important to consider how your learning system will cope should the situation ever arise.

You'll no doubt want assurance that your vendor has a robust system in place for data protection. Your learning system will contain sensitive information, user data and other content that will need to be kept private and secure.



Ask your potential vendor:

"How do you store the data?"

"What is the average downtime?"

"What recovery plans do you have in place?"

"Can you quickly scale up operations if required?"

"Are you ISO 9001/27001 compliant?"

"Do you have a security policy?"

"Can you integrate with our internal systems via API?"

Cloud-based or self-hosted?

While both options have their unique sets of benefits, you'll need to carefully consider which one best fits your needs.



Cloud-based

This is a good option for organisations that need a scalable learning system without the work and costs involved with installing and managing hardware. This is all handled by the vendor.

As your organisation grows, your learning system can grow with it.

Self-hosted

If your organisation has network limitations or a strict architecture for the learning platform, self-hosted is likely your best option to accommodate your requirements.

You'll need to ensure you have the resource and capabilities within your in-house team to manage a self-hosted solution.

06

Your demo checklist

To remind you of all the things you might want to cover, here's a handy checklist to take with you to your next learning system demo.



| | |
|---|--|
| Is it user friendly from both an admin and learner side? | |
| Am I able to opt for branding on the platform bespoke to my organisation (or individual teams within it)? | |
| Is it easy to author content? | |
| Will roles other than L&D have the ability to author content? | |
| Do reporting functions cover what I need to track? | |
| Can others in the organisation have access to reports? | |
| Are there tools in place to facilitate discussion and collaboration? | |
| Are there features which can help support talent development? | |
| Are there features in place to support self-led learning journeys? | |
| Do the standards meet my requirements? | |
| What hosting does it use? | |
| Is it mobile-accessible? | |
| Is it offline-accessible? | |
| Does it integrate with the right tools? | |
| Does it have SSO (single sign-on)? | |
| Is there good customer support in place? | |
| Is it easy to implement? | |
| Is it scalable? | |
| Does it meet security requirements? | |
| Does the supplier have valid examples of case studies? | |
| Did the vendor establish you specific needs before a demo? | |
| Did the vendor personalise and contextualise the demo to show how it addresses you challenges? (Note: This will show how invested they are) | |
| Does the system support badges and certifications? | |
| Does the system support xAPI and LTI? | |
| Does the system enable you to plug in BI tools? | |
| Can I manage competencies and skills for my learners? | |

07

Summary

We know that was a lot to take in. After all, sourcing the right learning system takes time if you want to get it right (and you definitely want to get it right). Here's a quick summary of what's been covered:

1. **The choice of learning system is individual to your unique organisational needs and challenges**
2. **Research and stakeholder involvement is key**
3. **Education and learning comes first, technology second**
4. **Consider the features carefully in relation to your needs**
5. **Don't overlook the importance of great customer support – find out what others are saying**
6. **Outline what you need in terms of scalability and security**
7. **Don't be afraid to ask the tough questions during a product demo**

By now, you should hopefully be feeling far more confident in approaching vendors and asking the right questions. Selecting the right learning system and integrating a more blended approach paves the way for learning that's personalised, collaborative, accessible and trackable – and can save your organisation both time and money in the long-run.

Do your research. Ask questions. Try the products first-hand.

The more you ask and explore, the more apparent the perfect choice will become.

