

Requirements Discussion Guide

Learning Platform Selection Process

On the following pages you'll find a set of questions an organization may need to ask when developing requirements for a learning platform and undertaking a selection process.

The list is not intended to be comprehensive, but it should provide a solid starting point for your selection efforts.

The questions are purposely not targeted at specific platform features. Rather, they are intended to surface general issues and circumstances that the implementation of a learning platform may help address.

You can use these as a discussion guide, adding and deleting topics and questions as your situation dictates.

We have a few overarching suggestions to accompany the discussion guide:

- Start with stakeholder value.

Faulty platform selection processes tend to start with a list of features; better ones start with a clear idea of the objectives for the platform (derived from the objectives for the organization overall and its education business), which often speak to the business problems to be solved and the desired user experience. And the best ones start with agreement about the value that a learning platform can deliver for all key stakeholders.

- Determine the desired user experience.

Once the platform objectives and the value to be created are clear, meticulously map out the elements of the ideal user experiences.

- Focus on the highest-priority features.

When the value and the user experience are clear, the highest-priority features and functionalities will also become clear. Learning platforms can do many things, but most organizations only need a platform to do a particular set of things really well.

- Leave no stone unturned.

Make sure vendor demonstrations cover your highest-priority features and functionalities in exhaustive detail. If, for example, it is important for you to be able to assign continuing education credit to a course, make sure you walk through every step of the process and are satisfied that the system either delivers on the user experience and value you need or that you have a plan for filling gaps.

Requirements Discussion Guide

Learning Platform Selection Process

- How important is it for us to follow the model of similar organizations (e.g., other associations) and potentially learn from their experiences?
- How many learners do we expect to serve through the platform?

General Company Information

General Platform Information

Implementation

- What length of time do we feel is reasonable for implementing a system, based on our organizational goals?
- What resources can we dedicate to it internally?
- Have we taken into account potentially more complex parts of an implementation, like integrating with other systems?

- How much is it reasonable for us to spend on a platform, based on potential revenue, cost savings, or other key considerations?

Pricing

Technology System Requirements

- Does it matter what technologies were used to develop the platform?
- How scalable does the platform need to be (e.g., do we foresee many learners accessing the platform simultaneously)?
- Do we need a lot of storage for our learning content (for example, if a lot of video will be used)?
- Do our end users or administrators have any special technology challenges or requirements we need to consider?
- How important is mobile access to our end users and administrators?

Integration and Interoperability

- Does the platform need to integrate with a Webinar platform?
- Does the platform need to integrate with an association membership system or other key software, like an e-commerce system?
- Do we want to make third-party content (e.g., “off the shelf” catalog courses) available through the system?

Standards and Guidelines

- Is it important for us to be able author content within the platform?
- If so, how “portable” does that content need to be (e.g., is there the possibility that we would need to move the content to a different system in the future or license it to third parties that use a different system)?
- Will we need to offer our learners course experiences or other content that was authored outside of our system?

- Is it important for us to host the platform?
- What are some of the details we would want to know about hosting provided by the vendor?

Hosting

Personalization

- Is it important that the learner be able to specify her time zone or language or otherwise “personalize” her learning environment?
- Is it important for us to provide the learner with course recommendations or special content based on her profile data, activity in the system, or other criteria?

- How closely will the platform need to reflect our overall organizational branding?
- Is it important that we be able to modify the overall look and feel? The navigation? The general content in the platform?
- Will there be a need to do any of this for administrators as well as for end users?

Interface Configuration

- Do we plan to serve an international audience with the platform?
- Which languages other than English does the platform need to support?
- Can we easily replace specific terms used in system navigation or other areas with translations or different terms entirely?

Internationalization and Localization

Search and Catalogs

- Will the learning platform house our catalog of offerings, or will another system handle that?
- How large do we expect our catalog of offerings to be?
- Will it be important to offer end users options for searching the catalog?
- Will it be important to offer administrators options for searching the catalog?

- Which modes of learning do we need to support? Completely on-demand and self-paced? Real-time? Facilitated over a period of time?
- Will the content for a single learning experience be authored and/or reviewed by multiple people?
- In what form does the source content for our learning exist (e.g., Microsoft Word or PowerPoint)?

Authoring, Managing, and Displaying Learning Content

In-person, Place-based Courses

- Would we benefit from managing our place-based educational offerings through the platform?
- Would this include education sessions at conferences?

- Do we currently deliver or will we want to deliver Webinars?
- If so, how important is it for the Webinar environment to integrate with this learning platform (e.g., is it important that they share the same registration and enrollment process)?
- Is it important that learners go through this platform to access a Webinar?

Webinars

- What are the ways in which our learners will typically register at our Web site, and what process or processes will result in their enrollment in a learning experience?
- Is it important to support multiple options for registration and enrollment?

Registration

Enrollment

Managing Continuing Education and Certification

- Do we expect to issue continuing education credit for learning experiences managed through the platform?
- What are the complexities of our credit process, and how would a software system ideally support this process?
- What key requirements do our end users have for tracking their continuing education?
- How might we add significant value beyond these requirements?

**Assessments
Evaluations**

- What role will assessment play in the learning experiences we intend to manage through the platform?
- What are the complexities of our approach to assessment, and how would a software system ideally support this approach?
- What role will evaluation play in the learning experiences we intend to manage through the platform?
- What are the complexities of our approach to evaluation, and how would a software system ideally support this approach?

- What data will we need to access to determine that the learning experiences we intend to manage through the platform meet the success criteria we have defined for them?

Reporting

- Is it important for us to provide chapters, corporate members, or other organizational stakeholders with access to the tools available in the platform?

Support for Multiple Sites

Custom Programming and Content Development

- Do we have needs so specific that custom programming for the platform may be needed to meet them?
- How desirable is it for the platform provider to be a one-stop shop (e.g., it can offering LMS and LCMS capabilities)?

E-commerce

- Do we plan to sell courses or other learning experiences that will be accessible through the platform?
- Will the learning platform handle e-commerce, or will another system?
- What are the complexities of our commerce process (e.g., member discounts, volume discounts, etc.), and how would a software system ideally support them?

- Ideally, how “hands on” will we be in managing the platform and supporting our end users?
- How much support do we expect our end users to need?

Support and Training

- What role do we expect communication and collaboration to play in achieving learning outcomes and meeting learners’ needs?
- What are some specific types of communication and collaboration it is important for the platform to support?

Collaboration and Communication

- Do we expect to issue microcredentials or digital badges?
- How will the microcredentials and badges workflow be similar to or different from the continuing education credit we award?
- What gamification features and functionalities do we want to support our educational offerings?

Gamification

Microcredentials and Digital Badges