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LEARNING MANAGEMENT
SYSTEMS DEMYSTIFIED

STEVEN D. FOREMAN

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To my Dad
David C. Foreman
1928-2017

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Foreword

“You must choose, but choose wisely, for as the true Grail will bring you life, a false one will take it from you.”

—*The Grail Knight to Indiana Jones in Indiana Jones and the Last Crusade (1989)*

While choosing and implementing a learning management system (LMS) is certainly not a life or death situation, your decisions and actions along the way (and the consequences) often make the process seem like one. LMS selection, implementation, and management are tough jobs. Choosing wisely, based on knowledge, experience, and proven practices, can go a long way toward avoiding an LMS experience that could be almost as bad as drinking from the wrong Grail.

But that’s easier said than done. As a speaker at many e-learning conferences and corporate meetings, I usually ask my audience if they have an LMS. Almost all raise their hands. I then ask how many are on their second LMS. More than half the hands are still in the air. When I get to a third or fourth LMS, and there are quite a few hands still raised, I start to wonder why there’s so much churn in LMS purchases. The reasons, of course, are varied, but over the years, a common thread has become clear:

“We bought before we thought.”

There is no doubt that the LMS world is fraught with challenges and tough decisions. After all, you can spend a boatload of money on the software, and then another boatload on implementation. You don’t just need savvy in LMS technologies; you also need to build support for your LMS investment.

When seeking an LMS, you need to get three things right. First, you need an overall learning strategy that the LMS can support. The LMS itself is not a strategy, but it can be a good strategy enabler. Then, you need to select the right LMS for your organization—not just for today’s needs, but for future ones as well. Buying an LMS can be a bumpy road—and a very expensive one—or it can be an easy, well-paved superhighway. And finally, you can’t just get an LMS and declare victory; you need to implement it correctly. Turning on an LMS without careful consideration of how it will be used can spell disaster.

Steve Foreman, a leader in LMS strategy, selection, and implementation, tackles the process head-on. After dozens of soup-to-nuts LMS projects in large corporations, small businesses, and government agencies, he knows a thing or two not just about LMS products and technologies, but also about the value that a solid LMS can bring to a training department and the organization as a whole.

Steve brings his experience to bear in a clear set of steps to acquire and implement an LMS. For trainers and their managers, the book provides a pathway for making sure the selected LMS is the right one and implemented correctly. For IT professionals, the book details some of the major technical issues that must be addressed for the LMS to fulfill its mission. For senior managers, the book represents best practices in LMS acquisition and implementation that can improve effectiveness and save money by doing it right the first time.

And do not fear: This book is not LMS hype. Steve does not tout one LMS over another or push you to rush into buying a certain LMS type. He has seen enough LMS mistakes to know that not every organization needs the same things from an LMS—and some might not need one at all. Every LMS selection and implementation is unique to the organization doing the project. This is not a cookbook either, but you should consider all the ideas in *The LMS Guidebook* for a successful project.

Steve takes a realistic look at LMS initiatives—the good and the bad—to come up with recommendations for making it all work. Even if this is your second or third LMS, you will likely find information and checkpoints that you weren’t aware of that will help you do a better job this time.

The book has lots of technical information and LMS jargon, some intended for trainers and some for IT professionals. There is no way a successful LMS project can work without addressing some serious technology issues, so Steve doesn’t shy away from any of them. That’s why the included glossary is so robust.

If this is your first LMS selection and implementation project, it's probably a bigger undertaking than you first realized, but this book can help you make the right decisions, the first time. If you've been through this before, you still probably don't know where all the pitfalls are, but you have certainly gained a healthy respect for them. *The LMS Guidebook* can help you avoid the mistakes of the past.

Like all software and software vendors, the LMS market is in a constant state of flux. New players replace (or merge with) old, technologies evolve, and organizations find new uses for their LMS while, at the same time, getting rid of some of the old uses. If you think this is going to be simple, think again. And start planning. An LMS is a big-time IT investment, and you will have a lot riding on this.

You will need to skirt some land mines on your LMS journey, but the destination is a host of great opportunities for your organization and the learners you serve. Steve knows the best route and is marking the trail. Now all you have to do is follow it.

Marc Rosenberg, PhD
Hillsborough, New Jersey
December 2017

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And now a walk down memory lane to acknowledge the InfoMedia Designs team of the mid-to late 1990s, who worked with me to develop a very early web-based learning management system for a multinational communications company. Our LMS was focused on supporting what would eventually become known as blended learning programs. Complementary solutions included a socially adaptive knowledge base and online communities of practice. Together, these platforms provided technology and process support for an early learning and performance ecosystem. Thanks to Rob Davis, Carl Chase, Bill Weisbach, Rick Ziminski, Alan Zeldin, Dean DesRosiers, Jackie Figueroa, Vanessa Fox, Alon Baram, Stephen Dempsey, and John Larson for all that innovative work. You were ahead of your time.

Thanks to all the InfoMedia Designs customers who have hired us over the years to assist in evaluating and selecting, implementing and integrating, and optimizing and improving operations for their LMS.

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Introduction

Just a few years after Tim Berners Lee invented it, the World Wide Web became ubiquitous in our daily lives and made many new applications of networked computer technology possible. One of these technologies, the learning management system (LMS), has been a staple in business, academia, and government since the mid-1990s. Over the last decade, advances in technology, changing workforce demographics, and the emergence of instructional design models that are more social, experiential, adaptive, and gamified have raised the question, is the LMS is still relevant?

Over the years, I have read many articles and blog posts declaring the imminent death of the LMS. The usual argument is that the LMS has not kept up with the times in which we find ourselves, when people are learning informally through social networks, knowledge bases, games, and short microlearning videos. And yet why are so many LMS products available, and why do so many organizations still have or want one? In fact, a 2016 study by MarketsandMarkets estimated the LMS market to have been worth \$5.22 billion in 2016 and forecasts that it will grow to \$15.72 billion by 2021. The bottom line is this: As long as organizations need to deliver courses, LMS products will continue to exist as an option.

Despite the proliferation of LMS products, there is still a good deal of confusion about what they actually do. When I ask people what LMS their organization uses, the responses I get are sometimes unexpected. I have heard people equate an LMS with e-learning authoring tools, web-conferencing systems, and social networking platforms. Clearly, there is some misunderstanding about what an LMS is, what it does, and what is involved in acquiring and operating one, not to mention getting a return on your investment. One of my goals in writing this book is to address this confusion.

I have also come across a great deal of customer dissatisfaction with LMS products. Some of my most popular conference presentations and workshops have had titles like Pain in the LMS and Avoiding an L-M-Mess. Over time, I have found several reasons for this dissatisfaction. One is customers who are unhappy with their LMS vendor's level of responsiveness or lack of alignment with their priorities for new product features. Another stems from problems with a product's usability, including its look and feel, complexity, or inadequate searching and reporting capabilities. Yet another is a result of the customer's lack of diligence in defining requirements and evaluating the right products for the right reasons, leaving them with a product that is not well suited to their needs. Last is the customer's lack of governance, standards, and processes, which results in a mix of outdated and poorly defined content that makes their LMS hard to use.

Putting a new LMS in place involves a significant investment in money, time, and resources and can be very disruptive to the L&D function and the organization as a whole. *The LMS Guidebook* is intended to help organizations minimize the disruption and get the most value from their investment by clearing up the confusion about the LMS and providing a set of proven practices for how to go about evaluating, selecting, implementing, and operating an LMS.

Why This Book?

The LMS Guidebook offers a broad view of the LMS industry and its various product categories. It offers guidance on how to go about evaluating and selecting an LMS. This shouldn't come as a surprise, but not all LMS products are the same—they won't all meet your needs. One of the purposes of this book is to enable you to ask better questions of vendors about their products and evaluate those products in a way that improves your decision-making process and increases your likelihood of successful software selection and implementation.

Once you have found the right LMS, you will be embarking on a potentially large-scale implementation project. This book offers in-depth guidance on LMS implementation and operation. It provides the information you need to effectively plan and execute all aspects of your LMS implementation, including how to establish appropriate standards, processes, and governance, and collaborate effectively with the IT function to ensure that the LMS works within your technology infrastructure.

Additionally, *The LMS Guidebook* covers the industry standards and specifications relevant to LMS products, and provides a glimpse of the future role of the LMS in the broader learning and performance ecosystem.

Who This Book Is For

If you are on the technical side of the LMS, there are many terms and concepts in this book that you'll already know and that may seem overexplained. Hopefully, you will find value in the book's description of LMS use models, processes, standards, and approaches, as well as how technology decisions play into LMS selection and implementation activities.

If you are on the instructional side of the LMS, you may find unfamiliar technical terms and concepts. I have done my best to explain the technology and added two glossaries at the end of the book, which you may find helpful. The first is a glossary of IT technical jargon. The second is a glossary of terms that have different meanings for L&D and IT. If you are able to talk about LMS technology with your IT partners, both parties are likely to emerge from those discussions with a more unified approach and a healthy working relationship.

But no matter your technical or instructional competencies, to get the most out of *The LMS Guidebook*, you should have a basic understanding of the L&D world and its lexicon. This involves courses, classes, curricula, credits, certification, compliance, course completion certificates, and other words that start with *c*—and relevant terms and concepts that start with other letters, too.

How This Book Is Organized

The book is split into three parts. Part 1, “What an LMS Does and How It Works,” contains the first five chapters. Chapters 1-4 provide a thorough grounding in the LMS market, the types of LMS products available, and the features you should expect to see in each type of LMS product. Chapter 5 delves into the various LMS-related industry and de facto standards of which you should be aware.

Part 2, “How to Select, Implement, and Operate an LMS,” has five chapters. The first, chapter 6, provides a clear set of steps to follow for evaluating products and selecting a new LMS. Chapters 7-9 provide detailed guidance on all the tasks required for effective LMS implementation. Chapter 10 focuses on how to operate your LMS efficiently—an area that is often overlooked by organizations and can lead directly to user dissatisfaction, poor data quality, and a negative perception of the LMS.

Part 3, “Beyond the LMS,” has two chapters. Chapter 11 discusses how LMS solutions are evolving to keep up with current and future needs. Chapter 12 concludes the book by introducing

the concept of a broader learning and performance ecosystem, a more comprehensive learning strategy that many organizations are moving toward, and how the LMS fits into this bigger picture.

Key takeaways are listed at the end of each chapter and included in appendix A, forming a comprehensive list of the most important considerations for your LMS project. The glossary of IT technical jargon in appendix B defines technical terms you will hear from vendors and your IT staff as you work on implementing your LMS. This is followed by a second, shorter glossary in appendix C, which contains a few terms that have different meanings for L&D and IT. You must take precautions when using these terms with your IT partners. I have seen situations where everyone was using the same term thinking they understood one another, while they were actually talking past one another because of the different meanings of the terms.

How to Read This Book

The LMS Guidebook will not tell you which LMS product you should buy. No book can do that because each organization—its needs and its resources—is different, and because the LMS market is crowded with so many vendors and products of different sizes, features, complexities, and costs. Matching the right LMS to the right organizational need is as much a function of experience and insight as it is about process and technology.

But this book does provide a comprehensive set of proven practices for LMS selection, implementation, and operation. It will help you get organized and put you on the right path to success. It will enable you and your team to manage a lot of issues, obstacles, and opportunities of which you may not have been aware. Share it with everyone who has a stake in your LMS project—or better yet, buy one for each member on the team.

Finally, this book reflects my experiences with many clients who have successfully selected and launched an LMS, and with others who have upgraded or replaced an existing LMS. While confidentiality rules limit my discussion of specific clients, the lessons learned and proven practices that came out of this work have greatly influenced the pages that follow.

Your LMS journey will be challenging, but I have found that it can be a satisfying one. It can also be a great learning experience, resulting in an outcome that provides value to you and your organization.

Good luck with your LMS initiatives!

PART 1

What an LMS Does and How It Works

CHAPTER 1

What Is a Learning Management System?

This chapter defines *learning management system* and describes the three main types of LMS products. It identifies the key advantages of commercial and open source products and lists the costs associated with acquiring an LMS. It describes stand-alone LMS products and those packaged as apps or plug-ins to popular software frameworks. It also compares an LMS with a learning record store.

A learning management system (LMS) is not the remedy for all your organization's learning challenges. But it can be useful, especially to organizations that provide training and education programs to employees, customers, suppliers, distributors, professional association members, military personnel, college students, and others. If your organization is one of these, you probably know that managing the delivery of learning programs presents many challenges.

Training events such as classes, workshops, and seminars must be scheduled for a specific time and place. The event may be at a physical location or a web address, as in the case of a webinar or virtual class. People must be able to enroll in the training event, and one or more instructors must be assigned to deliver the training program, take attendance, and issue credit for course completion.

Self-paced training introduces its own set of challenges. Course software and other digital materials must be uploaded and published for online access. People must be able to locate and launch the course. Their work must be tracked and recorded automatically so that they can receive credit. People who exit before finishing the course must be able to resume at the point they left off.

And of course, some training requires a blend of scheduled events, self-paced modules, assignments, tests, surveys, and other components.

Clearly, the need to manage and track training programs of all types requires software that can handle the task with sophistication and ease, and provide the L&D function with information it needs to improve its services to individual learners and the organization as a whole. An LMS can contribute significantly to this goal.

LMS Explained

Before going any further, we need to establish what an LMS is. Let's start with a basic definition:

An LMS is a multiuser software application, usually accessed through a web browser. It helps organizations manage training events, self-paced courses, and blended learning programs. It provides automation that replaces rigorous and expensive manual work, saves time, and enables you to organize your content, data, and learners. It tracks and reports on training activity and results.

If the key word in your organization's name is *education*, *training*, *learning*, *performance*, or some combination of them, you probably need an LMS. However, there are several different types out there. The specific type you need depends on what you are trying to accomplish.

3 Types of LMS Products

If you are confused about what an LMS is and what it does, you are not alone. Even if you believe you have a clear understanding, you may be surprised to learn that there are three distinctly different types of LMS, each with its own unique feature set. The learning management capabilities you need may be found in one or more of these product categories.

I have worked with organizations that started out trying to compare products from two or all three of these categories. After much wheel spinning and head scratching, they discovered that they were comparing apples with oranges. If you are getting ready to buy an LMS and don't have

a basic understanding of the LMS landscape, you may waste valuable time and effort evaluating products that are not optimally suited to your organization's needs. So let's take a quick look at the LMS marketplace.

I find it helpful to break down LMS products into three major categories, which I call corporate LMS, academic LMS, and integrated LCMS-LMS (the *C* in *LCMS* stands for content). While these labels are generally not used by vendors, they can help you understand the LMS business and make better LMS choices. But be careful not to rule out any of these categories because of its label. For example, many corporations use academic LMS products instead of, or in addition to, a corporate LMS. The labels are more about *how* each type of LMS is used rather than *who* uses it. Ultimately, a better understanding of these categories may help you focus on the type of product that best meets your needs.

Corporate LMS

A corporate LMS is about connecting people with learning programs. It has a catalog of all the courses you offer. People log in to the corporate LMS to register and get credit for your courses.

Corporate LMS products are primarily geared toward organizations that offer relatively short courses that may range from an hour or less to several days. They typically contain courses that a company's employees might need related to sales, customer service, products, policies and procedures, soft skills, personal productivity, management and leadership, new hire orientation, regulatory compliance, and other relevant topics.

Most LMS products are in this category, and there are many corporate LMS products available.

Academic LMS

An academic LMS is an online extension of, or replacement for, the classroom. It is a website where instructors and students meet and collaborate online. Instructors can post materials and assignments. Students can chat with the instructor or with one another, hand in assignments, and take quizzes.

Academic LMS products are primarily geared toward institutions that offer courses spanning a term or semester. There are a few dozen academic LMS products available.

Integrated LCMS-LMS

An integrated LCMS-LMS provides many of the same course delivery features as a corporate LMS. But it also offers features not found in a corporate LMS for developing, or authoring, content. Many course developers use PC or Mac authoring tool software to create online courses. Others use an LCMS to create not just online courses, but also job aids, instructor and student guides, and other types of learning content. Some of the most robust LCMS products are strictly focused on content development and do not offer any of the LMS capabilities needed to deliver the content to learners. But a growing number of products now offer both content creation and delivery capabilities. I call this type of hybrid product an integrated LCMS-LMS.

A learning content management system (LCMS) is a collaborative content development environment for course developers. It has a searchable library that stores and organizes digital source materials. Developers can check items out of the library to work on them and check them back in when finished. Workflows are established to manage the content development pipeline and notify developers, editors, and reviewers of actions they need to take. Templates can be created and used to make the appearance of content uniform.

Using More Than 1 Type of LMS

Some organizations use more than one type of LMS. For example, an organization may use a corporate LMS to manage self-registration, provide access to web-based courses, schedule training events, and track and report on training activity. The same organization may use an academic LMS for its virtual classes.

Commercial Versus Open Source LMS Products

Beyond the three types of LMS products already covered, both commercial and open source products are available. The key advantage of a commercial LMS is that it is fully supported by the manufacturer. If you run into problems, you have someone to call for help. The key advantage of an open source LMS is that there are no licensing costs. If you are on a tight budget, this is worth serious consideration.

Table 1-1 compares commercial and open source in terms of who owns the product, how product enhancements are managed, how costs are structured, and how the product is supported.

If you are unfamiliar with some of the technical terms, please refer to appendix B for a glossary of IT technical jargon.

Table 1-1. Commercial Versus Open Source LMS Products

	Commercial	Open Source
Product Ownership	The manufacturer retains sole control of product features, functionality, releases, and upgrades.	A voluntary community of software developers collaborates to develop, test, and release new product features and bug fixes.
Product Enhancements	• Customers may request new features. The manufacturer decides whether and when to add the requested features to its product development road map. Typically, features being requested by multiple customers get the most attention. • When a new version of the product is released, all the manufacturer's customers are able to take advantage of the new features.	• Organizations using the product may document a need for new features. The community agrees on which new features to build into the product. • Product source code is available and can be modified by anyone with software development skills; however, changes made without the consent of the community do not get incorporated into the official product.
Product Costs	• Annual or monthly licensing fees are typically charged to use the product, often on a cost-per-user basis that may be fixed or may decrease with more users. • Annual or monthly hosting, maintenance, and support fees may be charged separately or built into the licensing costs.	• There are no licensing costs. • Organizations and individuals can freely download the software, but must make their own arrangements for product hosting, installation, and maintenance.

Table 1-1. Commercial Versus Open Source LMS Products (cont.)

	Commercial	Open Source
Product Costs (cont.)	• Hosting fees typically cover a production environment that users can access. Additional fees may be charged for more environments, such as a staging instance of the LMS, where administrators can test new releases, integrations, and configuration changes before they are installed in the production environment. • One-time set-up fees may be charged for product installation and administrator training. • Some manufacturers also provide professional services on a time-and-materials or fixed-price basis to customers who need help with data migration from legacy systems or systems integrations.	
Product Support	• Manufacturers typically offer support plans and options, which define how to contact support staff, how trouble tickets are prioritized and resolved, hours of operation, typical turnaround timeframes, and issue escalation procedures. • Manufacturers may offer support service guarantees such as average bug report response time and average resolution time for bugs at each priority level.	• Open source community members often post blogs and online discussions to address product questions and issues. • Some third-party vendors may offer commercial hosting and support services for specific open source products.

Stand-Alone LMS Products

Most LMS products are offered as a complete, stand-alone system. In other words, the LMS has its own web address and user interface. Many of these products have administrator-configurable

properties that enable you to implement your own branding, logo, and color scheme. You can enable the features you want to use and disable those you do not. For example, if you want to require that people pay to take your courses, you could turn on the product's e-commerce features. However, if your courses are intended for employees, you could disable e-commerce.

These products usually offer integration capabilities that allow the LMS to share user account information and training data with other systems, such as human resource management systems (HRMS) used by businesses, membership management systems (MMS) used by professional associations, and student information systems (SIS) used by academic institutions. This is important because it improves the integrity of your data. If your LMS does not share user account data with your HRMS, MMS, or SIS, then user accounts must be created from scratch in the LMS. This can lead to discrepancies where the LMS user profile data differ from the data in your other systems, leaving you to wonder which system is correct.

Just a few years ago, all LMS products were stand-alone systems, and they still dominate the LMS market. In recent years, however, LMS products have emerged in the form of apps and plug-ins, which deserve some attention.

LMS Apps and Plug-Ins

A growing number of LMS products are available as apps and plug-ins that add learning management features to your existing website. If your organization's website is built atop a popular software framework such as WordPress, Salesforce, or Microsoft SharePoint, you should consider an LMS app or plug-in.

Like stand-alone LMS products, LMS apps and plug-ins can be commercial or open source and may offer corporate, academic, or LCMS-LMS feature sets. They generally provide the same functionality as their stand-alone cousins.

Because LMS apps and plug-ins are seamlessly embedded in your website, the user experience is more consistent and streamlined. People can access your courses without leaving your site to go to a separate system. This means that your customers or professional association members can view and purchase courses alongside other products and services, your employees can access learning programs alongside related documents and other content, and your academic students can access their courses through your student portal.

LMS apps and plug-ins are integrated with the data in your WordPress, Salesforce, or SharePoint framework. The same user database employed by other features of your website is also utilized by the LMS, and your LMS data are accessed through the framework's reporting tool.

- WordPress can be extended using plug-ins. Adding an LMS plug-in to WordPress allows you to add course delivery and reporting capabilities while you maintain control of the overall look, feel, and layout of your website.
- Salesforce refers to their extensions as apps. Adding an LMS app to Salesforce enables you to offer product training to your customers, sell courses side by side with your other products and services, or train sales and customer service representatives.
- SharePoint also allows for apps. By adding an LMS app to SharePoint, you can introduce learning management functionality to your website and integrate your courses with SharePoint's content management and social networking capabilities for a blended learning experience.

LMS Versus Learning Record Store

There is another learning technology called a learning record store (LRS), which is associated with the Experience API (xAPI) specification. (Read more about what you can do with xAPI and learning record stores in chapter 5.) But what is the difference between an LMS and an LRS? Should you get an LMS or an LRS?

The purpose of an LMS is to help you schedule, distribute, and manage the delivery of learning programs and provide direct access to people who use those programs. LMS users are learners, instructors, and learning administrators.

In contrast, the purpose of an LRS is to store the xAPI learning activity data generated by your websites, systems, and applications. LRS users are xAPI developers and data analysts.

Some LMS products that support xAPI have a built-in LRS or can connect to a third-party LRS. Increasingly, organizations are using an LMS to manage their formal learning programs and xAPI and an LRS to collect data on the informal learning that happens through social networks, knowledge bases, performance support systems, instructional games and simulations, and elsewhere.

Key Takeaways

This chapter introduced three types of LMS products (corporate, academic, and LCMS-LMS); compared the pros and cons of commercial versus open source products; discussed how an LMS can be a stand-alone product or an app or plug-in; and explained the key differences between an LMS and an LRS. If you plan to acquire the appropriate LMS solution for your organization, you need to understand the choices available. The key takeaways are:

- An LMS is a multiuser software application, usually accessed through a web browser, that helps organizations manage training events, self-paced courses, and blended learning programs.
- The three main categories of LMS products are corporate LMS, academic LMS, and integrated LCMS-LMS. Each has a unique feature set and use model.
- There are commercial and open-source LMS products. A commercial LMS is fully supported by the manufacturer; an open source LMS has no licensing costs.
- Most LMS products are stand-alone systems. However, some are packaged as apps or plug-ins for popular website frameworks such as WordPress, SharePoint, and Salesforce.
- An LMS should not be confused with an LRS, which collects and stores xAPI learning data generated in other systems. While LMS users are learners, instructors, and learning administrators, LRS users are xAPI developers and data analysts.

Now that you have a basic understanding of what an LMS is and is not, chapters 2-4 will delve more deeply into the features available in corporate LMS products, academic LMS products, and LCMS-LMS products, respectively.

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