

Learning Platform Toolkit

Buying a Learning Platform

If you're reading this, chances are you have already taken a look at learning technologies, such as a learning platform, as well as scanned online software technology portals for intel on a potential solution, such as Capterra, GetApp or Software Advice.

When the time comes to make a decision, you won't be alone. Different stakeholders have

different perspectives, different priorities, and unique requirements. Your first step to moving a collective purchase decision forward is not about solutions or tools, but instead identifying the problem you want to solve or opportunity you want to leverage.

At the highest level, there are typically three stages of purchasing a new technology solution:

1

Define the problem
you aim to solve

2

Identify
a solution

3

Select
a supplier

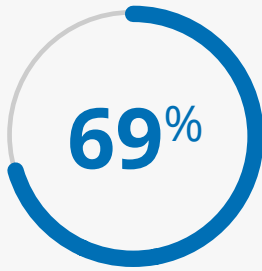
Defining The Problem

Ensure there is clarity around the business problem or opportunity that your company needs to tackle, and that everyone involved in the decision has a shared set of priorities around that problem.

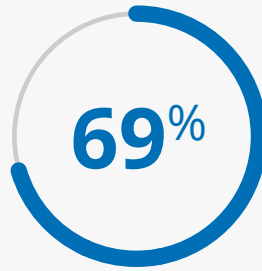
Once all stakeholders agree that they have a problem, it's time to think about the solution – the “how”.

IMPROVEMENTS DESIRED FROM SOLUTION PROVIDERS

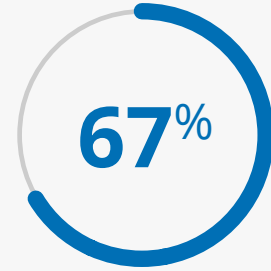
% of Organizations Overall



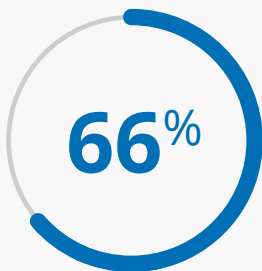
Partner in your organization's success



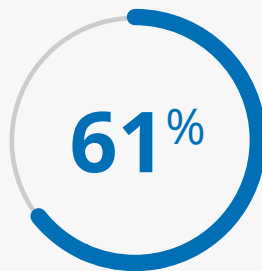
Value proposition/
total cost of ownership



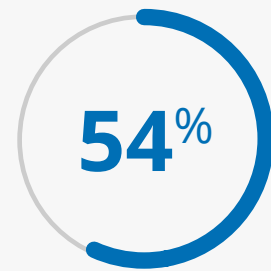
Completeness of functionality



Customer/technical support



Implementation capabilities

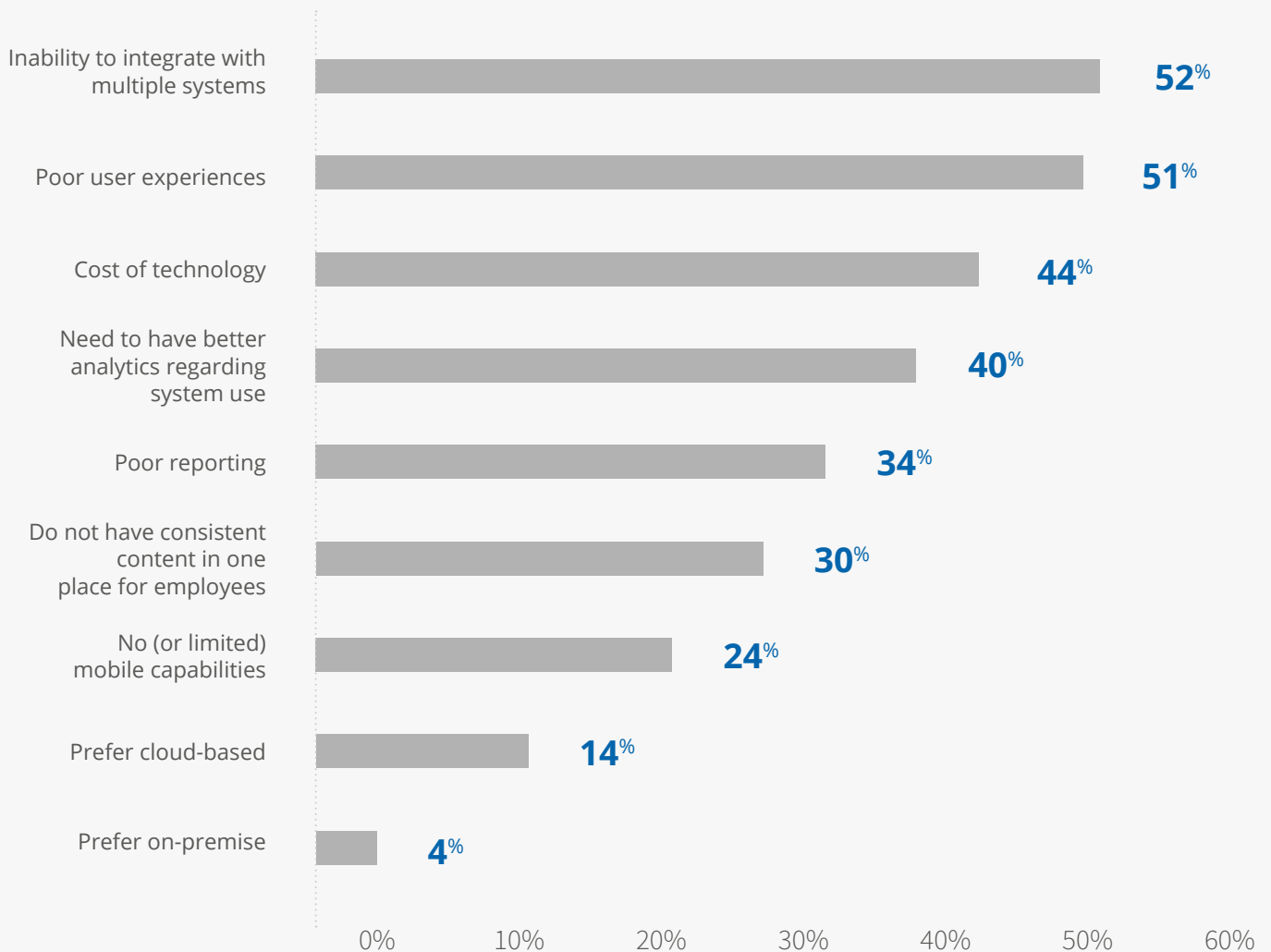


Product development roadmap



WHAT ARE THE BIGGEST BARRIERS TO SATISFACTION WITH LEARNING TECHNOLOGY?

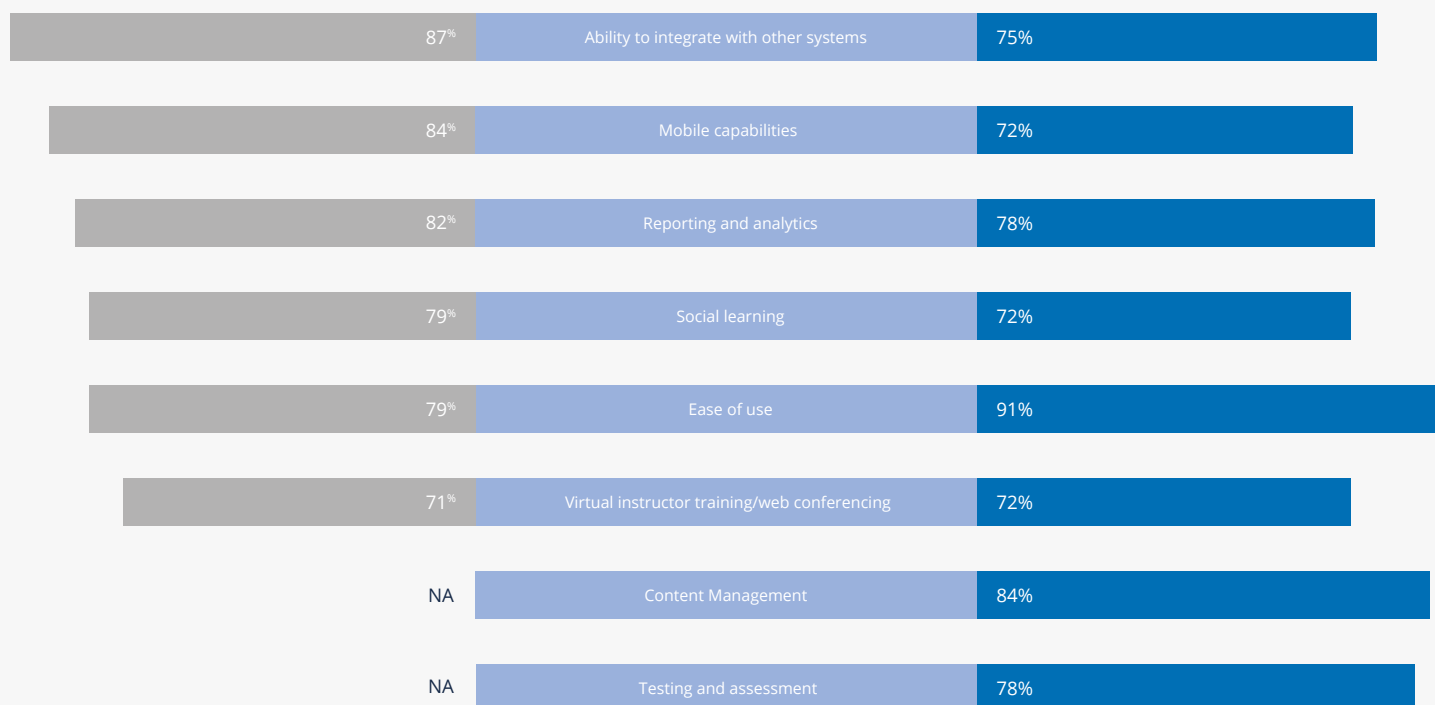
OVERALL



TOP IMPROVEMENTS DESIRED IN NEXT LMS

Large Organizations

Small & Mid-Size Organizations



Source: Brandon Hall Group Learning Technology Study 2017



Identify & Align On A Solution

Supplier selection is the easiest part of the purchasing process if you're adequately prepared (note: more tips on how to efficiently find the right learning platform for your organization are included in the next section of this guide).

However, reaching group consensus with stakeholders and aligning on a solution can be tricky.

According to [CEB](#), an average of 5.4 individuals are involved in today's B2B purchase decisions.

One of the biggest risks is falling into the trap of the lowest common denominator. You can avoid this and build consensus by:

- Understanding that consensus building is a process that must be managed
- Creating a common language to better understand mutual issues
- Identifying shared learning experiences to expose common priorities

Selecting a supplier can only happen when a group consensus is achieved.

Plan For Growth

No matter how carefully you define your learning needs, they'll evolve in ways you don't expect. You need a vendor that is likely to support future needs, whatever they may be. Be sure to look beyond specific features for flexibility and a history of product improvement.

Questions to consider for prospective learning technology vendors

Acquiring e-learning content and services takes careful planning to ensure that the investment returns a measurable impact on the business. There are a number of elements high-performing organizations need to consider:

<ul style="list-style-type: none">• Number of current users• Estimated number of users over the next 3-5 years• The geographic locations of users• Critical content needed to drive the achievement of business goals• Approach to e-Learning content: hands-on simulation, interactive games, or page• turner traditional• Multi-media platforms (e.g. audio, video, animation) through which learning content needs to be presented	<ul style="list-style-type: none">• Online learning content• In-house resources needed to manage the content• Deployment platform (installed vs. cloud)• Budget available• Training required• System reliability expectations• Content authoring tools needed• User interactivity• Language needs• 24/7 support
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Source: Laci Loew, Principal, Laci Loew & Company LLC

Vendor Selection: Questions to Consider

When investing in a learning platform, organizations will need to consider the following questions related to resources.

BUDGET

- ***What is our budget for learning technology?***
- ***What are we currently investing in and what are we planning to invest in for the future?***

Determining your organization's learning budget is critical before moving forward with a selection.

When companies invest in on-premise solutions, IT departments typically are responsible for technology. When companies invest in SaaS or cloud solutions, the L&D function usually

becomes responsible for the budget.

When thinking about the budget, companies should consider what they have spent in the past, what they can spend today, and what is realistic for the future.

PRICING

- ***What is the cost of a next-generation system and what is the pricing model available to us (pay per user, subscription model, licensing model, implementation fees, etc.)?***
- ***What happens if the price escalates after the first year?***

After determining the budget, understanding pricing options is a critical component for selecting a system. Since many factors influence pricing, it is nearly impossible to compare different pricing models for these systems. The most important thing that companies need to consider is what they are spending on every aspect of the product.

When thinking about the learning technology budget, companies should consider what they

have spent in the past, what they can spend today, and what is realistic for the future.

Companies can combat this challenge by asking very detailed questions about pricing. They also must plan for additional costs such as implementation services, training or additional users.

IMPLEMENTATION

- Do we need third-party support for implementation?
- What is a realistic implementation timeframe?
- Will HR/L&D or IT own implementation?
- Do we need training post-implementation?
- Do we need a global implementation strategy?

Implementation is challenging for many companies and frustrating when you have expectations about when and how you will be able to use your system. Companies must develop a plan for rolling-out their technology (possibly by region or by business unit). They must also be patient when the implementation does not go smoothly and have additional resources available, if needed.

What to Expect During Your Onboarding Process



[DOWNLOAD THE REPORT](#)

TIMEFRAME

- ***When do we need to revisit our existing contracts with our technology providers?***
- ***When do we need to upgrade our technology?***

Companies often look to replace technology when it is time to upgrade or renew their existing technology. They should look at what options are available and if a new system will be able to meet its individual workforce needs. Considering a timeline will depend on a company's existing technology, its resources, and its readiness to change.

DELIVERY MODEL

- ***What is our preferred delivery model?***
- ***If we currently use on-premise solutions, what resources do we need internally to support a SaaS or cloud-based system?***

Many organizations have a delivery model preference or requirements based on their overarching company strategy and policies. For example, industries with high-security needs require an on-premise or hosted model. The majority of next-generation learning management system providers offer an on-demand SaaS model or a cloud-based solution.

INTEGRATION

- ***How will we handle integrations?***
- ***What existing solutions do we need to integrate with?***

The high degree of integration in learning can become overwhelming for organizations who

are feeling pressure to select and implement a system in a short period of time. In order to

maximize the level of investment in these systems, organizations need to consider the long-term implications of an integrated strategy and begin any communications and change management to support this strategy before investing in a system.

METRICS

- ***How do we measure the real impact on the organization?***
- ***Which metrics do we need to measure the effectiveness of our learning platform***
- ***How will this system enable competency and skills progression as well as productivity and performance?***

In order to maximize the level of investment in these systems, organizations need to consider the long-term implications of an integrated strategy and begin any communications and change management to support this strategy before investing in a system.

Metrics include both traditional learning metrics, such as course completions and course satisfaction.

Defining metrics to evaluate technology is a challenge. It may seem clear why cost, time, and quality are important, but how can organizations ensure their solutions are improving these areas? Organizations should define the metrics they want to track in advance and determine how to communicate these metrics with key stakeholders.

Go Beyond Vanity Metrics: Discover Actionable Learning Platform Insights



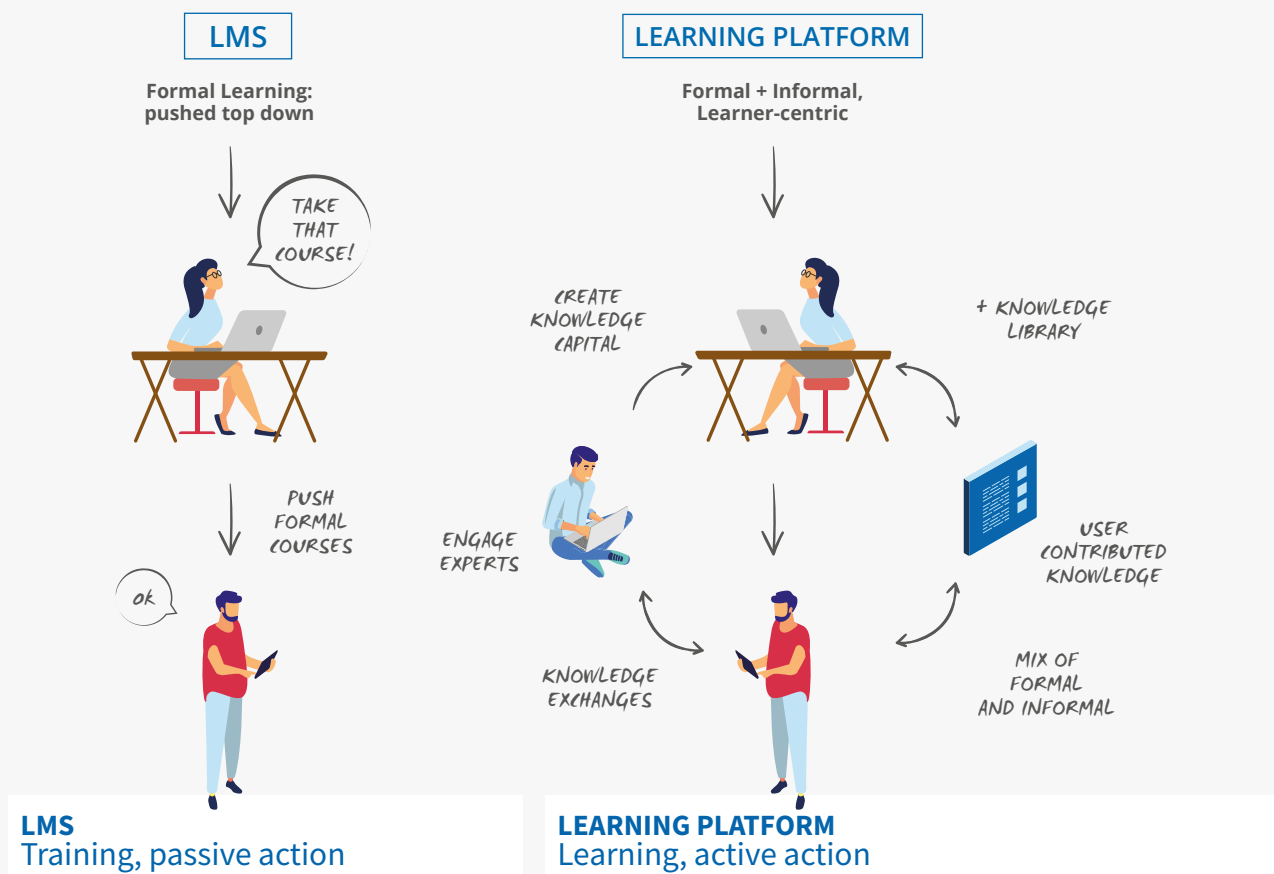
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LEARNER EXPERIENCE

- *How will this solution improve the learning experience?*
- *Is the technology simple and engaging?*

Organizations of all sizes are looking for ways to engage with employees, customers, and partners on a daily basis. Technology solutions should provide a simple experience that encourages better communication and engagement.

TRADITIONAL LMS VS MODERN LEARNING PLATFORM



Designed for managing training

Designed for LMS admins

Slow evolution

Training seen as a necessary cost

Formal learning only

Training requires time away from work responsibilities

Hard to integrate with other Cloud solutions

Only allows for rigid internal use cases

Designed for learning experiences

Designed for learners

Exponential evolution

Learning is integral to revenue growth and talent retention

Formal and Social Learning

Allows for continuous learning in the flow of work

Can integrate deeply into the enterprise's ecosystem

Supports variety of flexible use cases: partners, customers, franchisees, members (Extended Enterprise)

There is a cost to delaying action

Here are some common reasons why people may delay investing in learning technology, and how you can overcome them.

REASON FOR DELAY	HOW TO OVERCOME IT
POOR PLANNING As you've made your way through this toolkit, you probably have a better idea of all the moving parts involved when making a business case. Careful planning is key to ensuring this process runs smoothly and successfully.	 Do your research and set clear and realistic expectations and goals. Then, map out your execution plan accordingly.
UNDERESTIMATING TIME & RESOURCES Learning technology is a big investment, but it's a worthwhile one. Underestimating the time and resources it will take to implement your learning platform project will only cause further delays and frustrations down the road as you're continuing to justify your investment to your executive team.	 When mapping out your execution plan, list the anticipated timeframe and resources required. When evaluating learning platform vendors, ask questions to understand their pricing model and implementation services. The more you research and prepare, the more accurate your estimate will be.
NOT PROPERLY VETTING VENDORS Whether you're switching to a new learning platform or are a first-time buyer, it's imperative that you thoroughly evaluate vendors. Ensure that the vendor you choose can help you meet all of your learning goals.	 Set aside a solid amount of time for vendor evaluation within your learning platform implementation plan. Undergo an RFP process (if necessary). Review case studies from vendors' customers who have successfully implemented their solution for a similar use case. Putting in this time upfront saves you from future delays during implementation (or, from having to go through it all again later)

In short, there's never a perfect time to roll out new software or start a new project. Don't let the delay go on too long – you'll always be busy.

Once you've determined that you'll benefit from the investment, the longer you wait to implement a learning platform, the longer you'll wait to see your revenue move up and to the right.



Together, let's 'Get The Yes' – make learning your competitive advantage

We're here to help you along the way. If you need assistance putting together your learning platform business case, contact Docebo today!

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