



# CREATING YOUR LMS REQUIREMENTS CHECKLIST

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A Step-By-Step Guide

# HI THERE!

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So, you want to learn more about adopting a learning management system for your company? Whether you're choosing your first LMS or switching to a new one, you've come to the right place!

Selecting an LMS can be tricky, and there's a lot of unhelpful information circulating on the web these days. At Unboxed, we get your pain, because—long before we built our own LMS and a world-class training content design team—we were in your shoes. And believe us, we walked a mile or two. With the rapid adoption of AI, it's hard to determine what is flash & what is functional.”

As a training company, our goal is to make your job easier, and we hope this guide will help you discover your company's unique training needs. Think about this guide as your own bite-sized course in selecting and adopting a world-class LMS that drives bottom-line results for your company.

Schedule a Free Consultation at  
[UnboxedTechnology.com](https://UnboxedTechnology.com)

# WHAT'S INSIDE?

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## This Guide is **NOT**...

- A one-size-fits-all approach to choosing an LMS
- A checklist of whizz-bang, cool LMS features
- A sales pitch for Spoke (the world's best skill building platform we've ever seen)

## This guide is...

### A powerful tool to help your company:

- How to responsibly evaluate AI features
- Build the business case for a new LMS
- Identify your unique training needs and wants
- Establish a step-by-step process for selecting and adopting a new LMS
- Learn which questions are vital to ask all LMS sales reps you talk to

## Time is money

## Let's get started.

# TABLE OF CONTENTS

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Getting started: learning management systems.....	5
The business case for an LMS .....	11
How to choose an LMS the right way .....	14
Choosing your first LMS vs. making the switch .....	23
Meet Spoke .....	27
The Checklist.....	29
Bonus: AI Features Questionnaire .....	32

# GETTING STARTED:

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## LEARNING MANAGEMENT SYSTEMS

### learn•ing man•age•ment sys•tem

**(noun) A software application for delivering and tracking educational courses or training programs.**

At its simplest, an LMS is a repository for your training content, allowing you to:

- Host your curriculum and build individualized learning journeys.
- Upload or link to additional resources, like PDFs, audio and video media, digital learning guides, and online content.
- Track and report user progress, compliance, and engagement metrics.

So, if you need to deliver training and track individual reporting data, then an LMS is your one-stop shop.

**But a truly modern LMS can do so much more.**

# THE RISE OF THE MODERN LMS

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Any LMS can host your training content, but you want your employees actually want to engage with that content. To do that, your LMS needs to give users modern tools to take training into their own hands.

Because we now understand just how important discussion, communication, and incentives are to effective learning, Modern LMS's now also include social learning, gamification, integrated communications, Personalized Learning Journeys, AI Skill Building & Coaching Tools.



## SOCIAL LEARNING

Community functions, like following company champions, allow learners to keep the conversation going long after a training course has ended.

Educational researchers have been touting the benefits of discussion features in online learning for decades now because they allow participants to mindfully reflect on their peers' contributions before responding.



## GAMIFICATION

Incentives like points, leader boards, badges, and levels motivate users to engage with your LMS and increase their "social capital."

Truly modern LMS platforms go the extra mile and allow users to trade in their points for real-world rewards. They also allow users to take part in contests, track their progress, and receive regular updates.



## **INTEGRATED COMMUNICATIONS**

You need to build the training, market it internally, give learners multiple ways to engage with it, and reward the effort if you want to maximize the impact of training.

With a modern LMS, you can create training alerts on users' dashboards, send email notifications and newsletters, display pop-up notifications, and even have a news portal where users can quickly see what's happening in the company.



## **PERSONALIZED LEARNING JOURNEYS:**

A one-size-fits-all approach to training has never been ideal. With today's technology and tools, leading companies are curating the journey that learners take through their training experience.

The best LMSs enable you to personalize and individualize training, using visualizations to guide a learner along their path of learning and development.



## **AI SKILL BUILDING & COACHING:**

We've only scratched the surface of the capabilities of AI to augment training. One highly impactful application is providing feedback for learners about their skills and behaviors.

A cutting-edge LMS uses AI models trained on specific skills and coaching methodologies to provide real-time, hyper customized feedback that helps your learners grow.

# UNDERSTAND THE IMPACT OF AI

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ChatGPT isn't the only AI tool out there. LMSs have been using AI-enhanced features that enhance the learning experience for your users for several years now. These include personalized course recommendations, AI-based tagging for content organization, in-depth AI-driven reporting, enhanced AI-powered search functions, real-time content translations, interactive conversational AI, and advanced Natural Language Processing (NLP).

Each LMS takes advantage of these tools to varying degrees.

- AI-based course recommendations tailor learning paths to individual preferences, enabling a more personalized learning journey.
- AI-driven tagging supports content categorization, improving navigability and content discoverability.
  - Sophisticated reporting tools offer valuable insights into learner engagement and progress.
  - Enhanced search functions provide quick and accurate access to relevant materials.
  - Content translation features ensure inclusivity for a diverse and global workforce.
  - Conversational AI and NLP enhance interactivity and responsiveness.

When considering an LMS, think about the benefits that these features offer and how they align with your learning culture and your objectives for using an LMS.

Use the following guide to determine how an LMS vendor has incorporated AI Functionality:

- How does the platform use AI for user tasks like search?
- What is your company's policy on data security with AI tools?
- How do conversational AIs interact with users and what parameters or rules are set for them?
- Can the LMS deliver personalized content recommendations using AI?



# LMS CATEGORIES & DELIVERY

There are over 1,200 learning management systems available, and almost as many ways to categorize them! Instead of creating an exhaustive list of LMS categories, here are the three types of LMSs that really matter.



## ACADEMIC LMS: K-12 & UNIVERSITIES

Academic LMSs, like Blackboard, are specifically built for public and private school educators. They have robust grade tracking systems and are not focused on gamification or incentivizing learner progress.



## CORPORATE LMS: BUSINESSES & CORPORATIONS

LMSs like Spoke, Cornerstone, and SAP Success Factors are designed for corporate learners and focus on an engaging user experience, social learning, and gamification to reward learner progress. Robust corporate LMSs also have easy-to-use administrative portals, making it easy to upload content and access user reporting.



## ONLINE LEARNING PLATFORMS: ONLINE LEARNERS

Platforms like Lynda and Udemy offer not-for-credit online courses for adults who want to learn new skills. Course instructors are mainly industry professionals who earn royalties for course enrollment, but there is no corporate offering to track user progress for your employees.

ALL ACADEMIC AND CORPORATE LMS PLATFORMS CAN BE FURTHER CLASSIFIED BY HOW THEY'RE DELIVERED: CLOUD-BASED SOFTWARE OR INSTALLED, HOSTED SOFTWARE.



## SAAS / CLOUD-BASED LMS: EXTERNAL SOFTWARE PLATFORM

Software as a Service platforms (SaaS), known as cloud-based applications, are maintained by a team of analysts and engineers, eliminating a need for your internal IT department to troubleshoot or maintain the software platform. They are often more technologically advanced and user-friendly for mobile learning, multi-tenant support, and social learning.



## HOSTED LMS: INSTALLED SOFTWARE APPLICATION

Hosted LMSs are purchased software applications installed on your company's computers and maintained by your internal IT department. Updates to hosted LMS platforms are created and pushed less frequently than SaaS LMSs, and the LMS itself can only be accessed from a company computer, not through an online sign-in portal.

Many first-time buyers mistake academic LMSs for corporate LMSs, so understanding the difference between them is critical.

Likewise, many decision makers don't understand the business case for selecting a SaaS / cloud-based LMS versus a hosted LMS. Remember that part of what you're paying for with a cloud-based LMS is product development and frequent platform updates, which aren't included in the cost of a hosted LMS.

In most cases, we find that a cloud-based system works best because learners want a platform with modern learning features that can be accessed on the go. Do a Google search to learn more about cloud-based versus hosted LMSs, or reach out to the Unboxed team for a quick walk-through of what's right for your company.

# UNDERSTANDING LICENSING MODELS

In addition to understanding the different types of platforms, you should also be aware of the different pricing models.

DO A LITTLE DIGGING TO FIGURE OUT WHICH MODEL IS THE BEST FIT FOR YOUR BUSINESS, AND YOU'LL BE BETTER PREPARED TO TALK THROUGH THE PROS AND CONS OF EACH MODEL WITH YOUR NEW LMS PROVIDER.



## PER USER

An annual fee based on the number of users your company creates in the LMS.



## PER LOCATION

An annual fee based on the number of locations a company registers. Ideal for franchises and retail.



## PERPETUAL

A one-time software licensing fee with an annual maintenance fee.



## UNLIMITED USE

An annual fee that covers unlimited users and a usage of the LMS platform.



## ACTUAL USAGE

An annual fee based on how often your learners use the LMS.

# THE BUSINESS CASE FOR AN LMS

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When it comes to delivering training online, most companies can spot the benefits of using a learning management system: it's easy to deliver, easy to track, and users can access it on their own time.

But the business case for LMSs runs much deeper than easy-to-access training content. Over the last decade, cultural and technological shifts have created a workforce that:

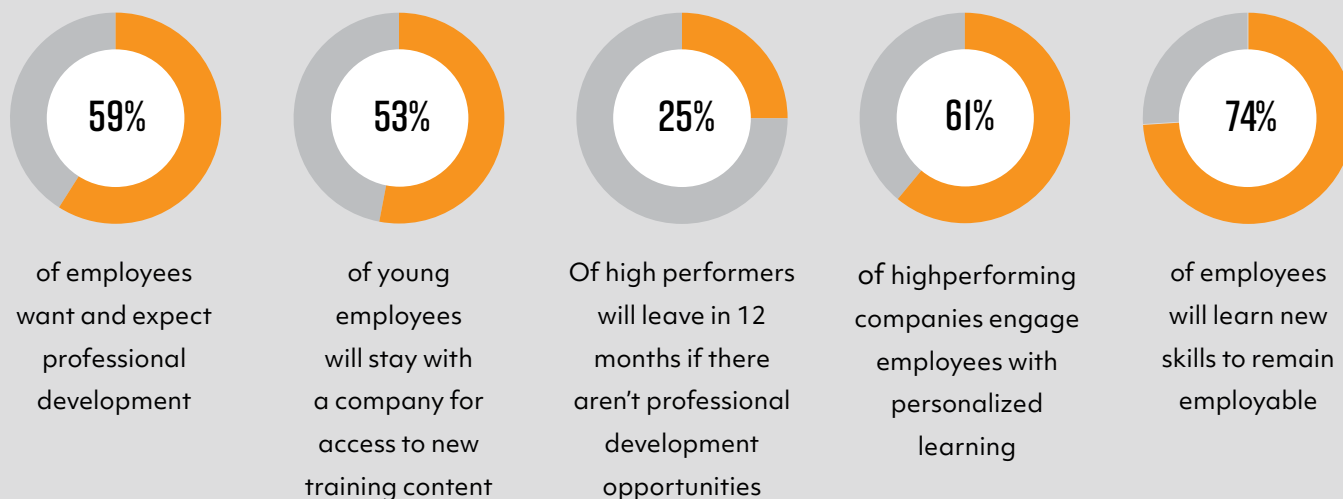
- Is more technologically adept
- Requires a well-designed user experience
- Wants growth and development opportunities from their employer
- Anticipates training and support tools that are integrated into their daily workflow
- Expects their employer to leverage innovative tools like AI

In short, employees have a different set of needs and wants than they did 10 years ago. They need modern training delivered on a modern platform.

Your company's learning audience is now multi-generational and multi-modal. They also want personalized learning, which blends formal, informal, and experiential learning together instead of solely relying on in-person, instructor led training (which can be costly).

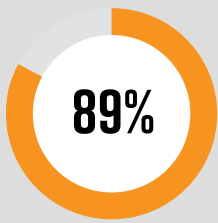
## THE NEW MULTI-GENERATIONAL WORKFORCE

HERE'S A PEEK INTO SOME OF THE MORE RECENT DATA ABOUT TRAINING NEEDS FROM TALENT ACQUISITION AND TALENT DEVELOPMENT RESEARCHERS, AND A FEW STATISTICS ON THE TRUE VALUE OF DELIVERING THAT TRAINING THROUGH AN LMS PLATFORM.

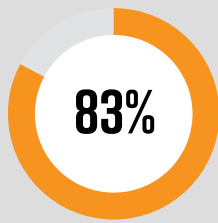


According to *Harvard Business Review*, the trap many companies fall into is thinking high performers are naturally motivated to do more, so they don't have to nurture their drive as much as they do with others.

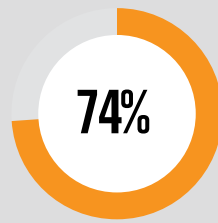
Underneath all of this is a huge trend in younger workers prioritizing an employer who cares about their well-being. Part of that is demonstrating a commitment to growth, allocating time for training, investing in career pathing and development. This shows that the employee is a valued part of the company.



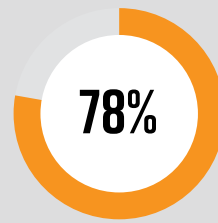
Extremely or somewhat motivated to improve skills



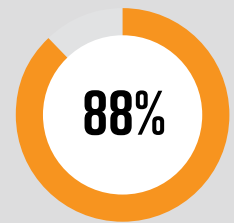
Skill development is a top priority for 83% of employees



Cite a lack of career mobility or skill development as the reason for planning to change jobs within a year



Of employees say they've benefited significantly or somewhat from their employer's training resources



Of workers say that career advancement is a priority from day one

Making more money isn't the only reason for developing skills – ability to impact their workplace and achieve better work-life balance. [Read more](#)

### Forbes article (citing LinkedIn study) on skill/career advancement for Gen Z/Millennials

- 76% of Gen Z say learning is a key to career advancement Quiet quitting?
- 83% of Gen Z want to learn skills to perform better in their current role. [Read more](#)

### LinkedIn Workplace Learning 2023

- Among 18-34 year olds, the top two factors when considering a new job opportunity are "Opportunities for career growth" and "Opportunities to learn and develop new skills". [Read more](#)

Research into international corporate training programs from the [Brandon Hall Group](#) shows revenues increase when companies invest in a personalized learning approach that leverages an LMS.

In light of shrinking or stagnant budgets, [Training Magazine](#) reports that instructor-led training has declined while online training has increased. Due to the high costs of providing in-person training for large teams, companies are using LMSs to save money while also boosting their bottom line.



# HOW TO CHOOSE AN LMS

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## THE RIGHT WAY

### Rule #1:

**Never, ever, ever start with the features.**

Don't believe anyone who tells you choosing an LMS is easy as 1-2-3. Like your momma always said, anything worth doing isn't going to be easy, but following a tested process can dramatically reduce your headache.

As a training company, we believe that knowledge is power. So, we're going to show you how to choose an LMS the right way.

Our process starts with assembling a great team who understands your users' needs, because training is built for people, not balance sheets.

# ASSEMBLE YOUR STAKEHOLDER TEAM

Whether you're selecting your first LMS or making the switch, assemble a team of stakeholders who represent each unit of the business. Too often, we see stakeholder teams made up of a small set of executives or department leaders.

## BUILD A DIVERSE TEAM

Limiting your stakeholder team to a small set of executives or department leaders is dangerous, because it reflects top-down decision making. To create a true culture of learning, you need your entire leadership team and your employees to be your biggest champions of learning. But, employees will never be your champions if they don't feel enfranchised in the process from day one.

Assemble a team that includes executives, department leaders, and employees from across the business. Doing so will ensure you have represented as many diverse voices and perspectives as possible. Yes, it will require a serious time commitment from everyone, but the upside is an actual boost to the company's bottom line, so it'll be worth it. Trust us



## PRO TIP: CREATE A PROJECT TIMELINE AND CHOOSE A TIE BREAKER

In your first team meeting, set a project timeline with clearly articulated deadlines to help hold the team accountable. Plus, choose someone to be the tie breaker in the event of an even vote.

*To create a true culture of learning, you need your entire leadership team and your employees to be your biggest champions of learning.*

# GET TO KNOW YOUR USERS

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Once you have your stakeholder team assembled, it's time to get to know your users. If you're familiar with buyer personas in marketing or user personas in software development, you're ahead of the game.

By creating a list of user roles, you build an accurate profile of each type of person who will use your LMS and what they'll use it for. Just like assembling a diverse stakeholder team, you should assemble a diverse list of each user's need for your LMS and think critically about what separates their needs from one another.

Here's a sample list of typical user roles:

- Department Employees
- Assistant Managers / Managers
- Directors or Vice Presidents
- Executives
- LMS Administrator
- HR staff

## ADDRESS HOW THEY'LL USE THE LMS

Once you've created a list of user roles, it's time to narrow in on how they'll use the platform. This set of needs will be very different for each user group. For example:

*Managers may need to track learner progress from their dashboard and quickly communicate with employees.*

*Administrators may need to have a simple interface for uploading course content, pulling reporting data, and pushing in-app notifications or emails about new training content.*



## WRITING EACH USER ROLE

There's no one right way to make a user role. What's important is that you create the most accurate representation of each type of user as you can. For diverse companies, that might mean making a user role for each department, or it could mean making a persona for each level of the organization, such as employees, managers, directors, and executives.

Your user roles shouldn't be exhaustive. Instead, they should effectively describe how this specific user role wants to engage with your LMS, what they really care about (how they define a good user experience), and a bit about their unique role and needs in the organization. Keep it simple, and focus on what needs they have when using the LMS.



### PRO TIP: TRAINING MODALITIES

Starting off with designing a training solution can feel a bit like being lost without a map. Wondering where to kick things off? The first move is figuring out the best way to get your content across to your audience. It's all about matching the delivery method with what you're teaching and who you're teaching it to. Check out our Infographic to help.

Now's a great time to discover the different types of training content your users will want to access in the LMS. Use a free online survey tool like Google Forms or Survey Monkey and offer an incentive for responding.

If you have more time, consider running focus groups with different employees across each area of your business. Since we think more clearly in groups, you can sometimes get better answers from a discussion-based group setting.

Either way, make sure to cover key training content topics with your learners like these:

- What types of media do they want to engage with, i.e. videos, interactive learning guides, simulations, etc.?
- What new knowledge, skills, and behaviors do they want to develop to be better in their current role, or grow into a new role?
- Who do they want to engage with through social learning, and what types of social learning tools would they use the most?
- What would incentivize them to pursue continued learning?
- How do they want to be notified when new training is available?



Download the Training Modalities Infographic

# WRITE USER STORIES

User stories are short, simple sentences that describe what a user wants to be able to do with a certain product. They're used in a lot of industries to figure out the exact goals users have when they use your software. For your new LMS, think about them as mini case studies for how people will use your platform, what they want to access on it, and when they'll use it.

Why spend time with your stakeholder team writing user stories? Because if you don't, you'll end up looking for—and paying for—features you'll never use. User stories filter out the noise of the thousands of nice-to-have features versus the dozen must-haves your company likely needs.

*“When it comes to LMS platforms, it’s all about filtering out the noise of unnecessary features so you and your learners aren’t constantly overwhelmed. Find the must-have items your company needs, then narrow in on nice-to-haves.”*

—Dave Romero, President, Unboxed Technology



## ROLE-GOAL-OUTCOME MODEL

Each user story describes a feature, or function, of the software a user wants, and by combining the stories together, you get a requirements list you can separate into must-haves versus nice-to-haves.

The most common way to write a user story is to use the role-goal-outcome model:

*As a (sales rep), I want to (take training courses on my iPad) so that (I can complete my training on the road).*

*As a (manager), I want to (get notified when my employees have completed their training) so that (I can report my department's progress for compliance training).*

Here, you try it.

As a \_\_\_\_\_ I want to \_\_\_\_\_ so that

As a \_\_\_\_\_, I want to \_\_\_\_\_ so that

As a \_\_\_\_\_, i want to \_\_\_\_\_ so that



### PRO TIP: MANY HANDS MAKES THE WORK LIGHT

Anyone on your stakeholder team can write a user story, and if you can divide and conquer, the process will move quickly. Remember, the simpler the better, and don't be nervous when you have a large stack of user stories in front of you—you'll use them all in the next step to build your requirements list.

# SEPARATE MUST-HAVES FROM NICE-TO-HAVES

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Now that you've identified your users, discovered how they'll use the LMS, and created your user stories, it's finally time to create a list of technical requirements for your new LMS that supports your company's unique training needs.

You'll likely start with a lengthy list. At this point it's critical to separate your must-haves from the nice-to-haves.

## MUST-HAVE REQUIREMENTS

After your team has written all the user stories they can think of, go back through and mark the user stories that describe essential, must-have LMS functions. You should be able to tie each must-have function to your organization's specific training goals.

## NICE-TO HAVE REQUIREMENTS

Nice-to-haves are a bit trickier. After picking your must-haves, your team will have a lot of user stories left over to look through. Here's a handy two-step process for ranking them quickly and effectively.

1. Go back to your remaining user stories and pick out the LMS functions described in each story (e.g., can access the LMS from a tablet).
2. Rank the nice-to-have features using a system that works well for your team (e.g., High, Medium, Low priority levels). This will help you find LMS functions you can cut off your list immediately, and which ones you'll want to give more thought to.



### PRO TIP: SHARE THIS LIST WITH LMS PROVIDERS AS YOU SHOP AROUND

When you reach out to an LMS provider's sales team, your list of technical requirements will help them easily understand your exact needs (and whether they can meet them).

# CHOOSE YOUR LMS PARTNER

You've made it to the last step—which means you're ready to seek out an LMS provider and start asking the hard questions. When you're talking with an LMS provider's sales team, your goal is to understand whether they are going to be your vendor or your partner.

## VENDORS

Work to land your company's account and focus on selling a product instead of understanding your business needs.

## PARTNERS

Base their company's success on your success, and work to nurture and grow your training approach as an organization.

Below, we compiled a list of five questions we think you should have a great answer to before choosing anyone as your next LMS partner. The answers you get will tell you how invested they are in you as their business partner, as well as how invested they are in advancing their LMS.



### Are they committed to delivering great training to your learners?

A modern LMS is only one part of a great learning experience. Choose a partner who can support all your training needs, including technology and content.



### Are they concerned with helping you track and increase user engagement?

You need to understand how your users interact with your LMS. User engagement data will help you refine your user experience and provide a quality training experience.



### Are they willing to let your growing business needs influence the product road map?

A product road map is a company's plan for new updates, features, and capabilities. As your company grows, so do your needs. A great partner will let your needs inform their road map.



### Are they actively exploring ways to innovate the training industry?

Training technology is constantly on the move, so how dedicated is your LMS provider to exploring new technologies? Choose a partner who understands its role in the future of training and is dedicated to exploring new horizons.



### Are they going to pick up the phone when you need support?

Is there a passionate team of training professionals, account managers, and software developers to support your training, troubleshoot issues, and help you get more out of your LMS?

# CONGRATS!

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You just identified your company's technical requirements for your next LMS that accurately reflect the needs of your entire organization. And, you did it all using actual qualitative research gathered from your colleagues!

At the end of this guide, you'll find a step-by-step checklist to help you plan the full process of selecting an LMS, which takes you from assembling your stakeholder team to building a launch plan, including our AI features questionnaire. This will take you...

**There are still a few more things to do...**

...like double-checking your training strategy, or planning your data migration, which you'll discover in the next section, so let's keep going!

You're in the home stretch!

# CHOOSING YOUR FIRST LMS VS. MAKING THE SWITCH

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The biggest difference between first-time LMS buyers and those looking to switch LMSs is data migration. If this is your first LMS purchase, then you need to consider what to do with your current training records, if you have them.

# CHOOSING YOUR FIRST LMS

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If you're new to LMSs, then starting with user stories and user personas is even more important, because you don't have engagement metrics to show you how your colleagues are using a current LMS.

If you've already been running training initiatives outside of an LMS, such as instructor-led courses, paper and digital workbooks, and small-group sessions, then you'll need to understand how that data can be migrated into an LMS. Your new LMS provider's implementation team can help you craft a solution that's best for your data management needs.

If you're not already running training initiatives, then it's time to explore blended learning and build some great content!



## **PRO TIP: START AT THE START WITH GREAT CONTENT**

A snazzy container without anything in it is a waste, and you can't build a successful training program in your company without a company-wide training strategy in place first. LMS features are like bells and whistles, and they can't ring or sing without amazingly engaging content.

If you're not sure how to create a great training strategy, reach out to a training content team, like Unboxed. Your user surveys will give you a great look into what types of content your company wants, and how and when they want to engage with it. Now, you need a team of experts to help you put together a strategy that leverages blended learning tactics like instructor-led training, video simulations, animations, training websites, and apps.



# MAKING THE SWITCH

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This is where things get fun—at least for our data analysts and engineers over here at Unboxed. There are two things you need to think about as a company making the switch to a new LMS: identifying your pain points, and migrating your data.

## START FROM PAIN POINTS

When you're replacing an existing learning platform, you need to start from a set of clearly articulated statements about the pain points of your current LMS. Use those pain points to guide the conversation when you start to negotiate features. At the end of the day, if those pain points aren't accurately addressed and solved, a hyper-modern, tricked-out LMS won't fix what's actually broken, and you'll have wasted time and money making the switch.



### PRO TIP: DON'T TRANSFER TOO MUCH DATA

Don't feel like you need to transfer all the data in your current LMS / LRS. If your company only keeps employee records for 4 years, but you have 10 years' worth of data in your LRS, consider whether you need it.

The more data you have to transfer, the more troubleshooting you'll encounter.

Here are some of the frequent pain points we hear:

- The price isn't worth the service we're getting.
- Our LMS is clunky and old—it doesn't have modern learning features and can't be used on mobile devices.
- No one is using our LMS.

This last one is tricky. Best-in-class engagement only happens when you combine top-notch training content with easy-to-use technology. Combined with a leadership team who actively supports and participates in training, you have a true learning culture that will produce bottom-line revenue growth.

## A THOROUGH DATA MIGRATION PROCESS

After migrating more rows of data into Spoke than we'd like to count, we've learned that switching your LMS doesn't have to be a painful experience. But it does require a thorough process to make sure the user, content, and transcript data from your existing system makes it into your new LMS safe and sound.

Your new LMS provider's implementation team will help you establish a detailed process for what to transfer first, and how to test the system once it's all in place. They can also help you create a thorough QA process for testing user profile creation, course data, course content, and learning transcript data recording.

# YOU'RE READY

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It's time to get busy choosing your next LMS!

Like we said, we know it's not easy—and there's a lot here to chew on as you start building your stakeholder team and narrowing in on your list of technical requirements.

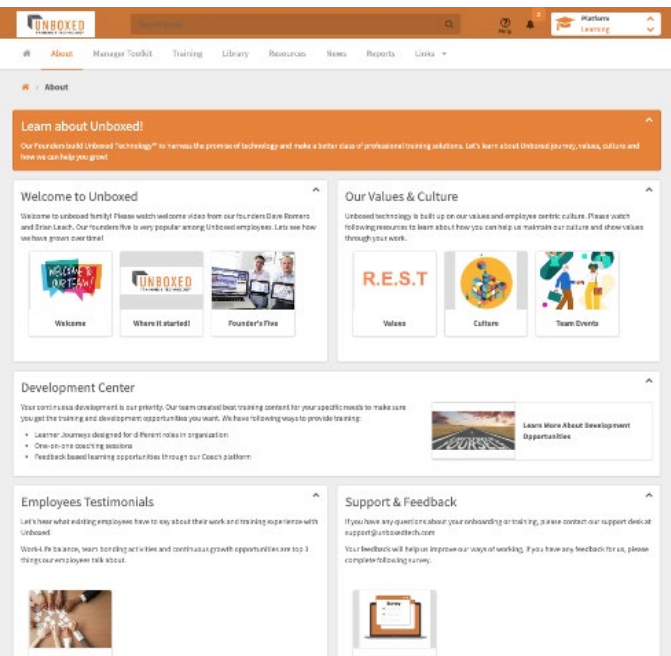
The important thing is to avoid getting overwhelmed. Take it step-by-step, and we know you're gonna be great.



# MEET SPOKE & THE UNBOXED TRAINING TEAM

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Our management team might have our heads if we didn't at least put in one tiny plug the World's Best Learning & Skill Building Platform, Spoke, and the Unboxed Training Team." plug for our world-class LMS, Spoke, and the Unboxed Training team.



## Spoke: World's Best Skill Building Platform

- **Customizable Learner Journeys:** Spoke offers the flexibility to create personalized learning paths. These paths utilize proven micro-learning methods and include an engaging milestone map to help track progress effectively.
- **Integrated Coaching Tool:** Growth is measurable with Spoke's in-built coaching tool. This feature facilitates consistent and structured feedback and coaching for employees from their managers. This tool is vital for tracking development and ensuring effective skill acquisition.
- **Insights and Reporting:** Spoke provides detailed insights and analytics not just for administrators, but also for managers. Gain automatic access to interactive reports on your teams...

Unboxed provides an Integrated Learning Ecosystem to help you evaluate your learning management strategies, develop engaging & goal-oriented training content and deliver measurable skill building in an intuitive learning & coaching platform.

So, take a look and see if your LMS (and while you're at it, your training content strategy) fits the business needs of your organization. And hey, we're here to help!



Reach out to the Unboxed team for more information, additional tips, or a company-wide training strategy for your team.

# THE CHECKLIST

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Use the checklist on the following two pages to stay organized and track your progress. If you're unsure about a specific step in the process, reference the information earlier in this guide for clarity. And of course if at any point along the way you feel stuck or have any questions, just give us a call. We'd be happy to help you work through it

## ALL-STAR STAKEHOLDER TEAM, ASSEMBLE!

Establish a project lead

Build a small team of diverse stakeholders

- Establish roles, responsibilities, and time commitment
- Gather all critical out of office dates from team members
- Designate a tie breaker for split-vote decisions
- Determine supporting stakeholders (e.g., vendors and partners)

Hold a project kick-off meeting with all stakeholders

- Set a weekly or bi-weekly time for regular project meetings
- Review current LMS contract to determine how and when to give notice (if applicable)

## LET'S WRITE USER ROLES & USER STORIES

Create a list of each LMS user role in your company

Determine training content needs for each user role using a survey or internal focus groups

- Assemble team feedback into a concise, sharable format for the stakeholder team

Address how each user role will use your LMS platform

Write a user role for each type of user in your company

WAIT: If you haven't done so, define your company-wide training strategy

- Identify required training topics and create learning journeys for each type of employee
- Choose the blended learning modalities that are best for your learners, and identify any training that will live outside your LMS
- Determine how to track and report user progress and compliance

Divide and conquer, write user stories for each user role with the role-goal-outcome model

## MUST-HAVES AND NICE-TO-HAVES: BUILD THE LIST

With your user stories in hand, identify your must-have requirements

Using a ranking system, determine your nice-to-have requirements from your remaining user stories

Assemble your must-haves and your top prioritized nice-to-haves into a list you can use when talking to potential LMS partners

## CHOOSE YOUR LMS PARTNER

Search for LMS providers using Google, industry trade publications, and referrals, or begin your RFP process if your company requires it

Narrow your list to 3–5 LMS providers to reach out to personally

- Perform due diligence on each LMS provider
  - Request a demo
  - Ask for product and spec sheets, or other sales collateral
  - Read product reviews
  - Ask to speak to a current client referral Practice uploading content to their platforms
- Test all social learning, gamification, and other features
- Access the platform on desktop, tablet, and mobile devices
- For SaaS LMSs, log into the platform off-site
- Upload a small learning transcript file and ensure compatibility

Ask questions to understand if your prospective LMS provider will be a vendor or a partner

Make your decision!

- Inform other LMS providers of your decision
- Execute a service agreement with your new partner

## PREPARE FOR LAUNCH

If switching, create a migration support plan with your current and new LMS partners

Upload/import users and assign roles

Upload/import training course and resource content

Configure specific branding and other customizable settings

- Create a thorough QA process with your implementation team to test all user profile data, course content, learning journeys, resources and linked content, learning transcript data, and social learning/gamification functions

## BUILD THE HYPE & LAUNCH YOUR LMS

Notify admins and users of the blackout data of your old LMS and go-live for your new LMS

- Create a backup plan for critical training planned during the LMS transition

Create a backup plan for critical training planned during the LMS transition

Launch the LMS

- Gather survey feedback about platform migration
- Gather survey feedback about the platform and its feature sets

Pass any feedback along to your LMS partner to address any feature set or platform issues



# BONUS: AI FEATURES QUESTIONNAIRE

KEY CONSIDERATION	CONTEXT
<b>How does the AI personalize learning experiences?</b>	This question seeks to understand the mechanism behind personalized learning paths and content recommendations. It's important to know how the AI assesses learner preferences, performance history, and engagement levels to tailor the learning experience.
<b>What data analytics and reporting capabilities does the AI offer?</b>	Inquire about the type of data the AI collects and analyzes, and how this data is presented in reports. Understanding these capabilities helps gauge whether the LMS can provide actionable insights into learner performance and program effectiveness.
<b>Can the AI adapt to different learning styles and needs?</b>	This question addresses the AI's ability to cater to a diverse range of learners, considering various learning styles, abilities, and accessibility requirements.
<b>How does the AI support content categorization and searchability?</b>	Ask about the system's ability to organize and tag content efficiently, and how the AI-enhanced search function improves content discoverability and user experience.
<b>What level of conversational AI and language processing is available?</b>	Understanding the sophistication of conversational AI and NLP within the LMS can help you evaluate how these features enhance learner engagement and support.
<b>How does the AI ensure content relevance and up-to-dateness?</b>	This question is about the AI's role in content management, specifically how it ensures that the learning materials remain relevant, current, and aligned with industry trends.
<b>What are the security and privacy protocols for AI-powered features?</b>	Given the use of AI and data analytics, it's crucial to understand how the LMS handles data privacy and security, and whether it complies with relevant regulations.
<b>How scalable and adaptable is the AI functionality?</b>	Investigate whether the AI capabilities of the LMS can scale according to the organization's growth and adapt to future technological advancements or changes in learning strategies.
<b>What kind of support and training is provided for the AI features?</b>	Knowing the level of support and training available is important for smooth implementation and utilization of the AI features.
<b>What is the ROI of integrating these AI features?</b>	Finally, ask about the expected return on investment (ROI) from implementing these AI features in terms of improved learning outcomes, efficiency, and learner engagement.



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