



RFP Insights  
for  
**Learning Management  
Systems**

# How to create an RFP that will guarantee you choose the best LMS for your company.

A 'one size fits all' approach may work perfectly fine for things such as socks or leggings, but if you try to use it with the purchase of an LMS you are bound to fail.

Being tasked with the job of finding the perfect LMS for your company is stressful to say the least. And, for big ticket expenses, there is no room for mistakes. As a result, the RFP process has not been very popular from both a buyer and supplier perspective.

Much of the reason for such hatred is because of encounters with too many poorly written RFPs. Without a doubt, you are likely to find a standard RFP template to use

## What is an RFP and Why do I Need it?

In order to write a successful RFP that will guide you to the best LMS for your business, you must know what it is and why it's so important.

### What is an RFP?

By this point in the game you should have already gone through the process of narrowing down your top LMS candidates, and are ready to see exactly what your top 3-5 vendors have to offer your business via an RFP.

In the most basic terms, an RFP is a request by your business to potential vendors to submit a detailed proposal or bid to provide a service or commodity. They're usually used for higher-value purchases, like an LMS, because they can require a significant amount of work to prepare, respond to and evaluate.

Often times, an RFP is confused for a,

- Request for Information (RFI) – An RFI may be asked for in the very early stages of the process when you're not quite clear about what you need or want.
- Requests for Quote (RFQ) – An RFQ is generally used when you have already made your decision about a very simple product or service.

### The Importance of an RFP

Some people will choose to forego complex processes, i.e. LMS RFP, to get to the end result faster but this often leads to missed requirements and unforeseen potholes and road blocks along the way. It could even mean choosing the wrong LMS for your business.

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## Minimize Margin of Error

There are over 700 LMS training systems on the market specializing in corporate, academic, association and continuing education needs. And, they range in price from free to astronomical! An RFP makes it possible for you to structure the evaluation process, so you can compare vendors “apples-to-apples” and determine how well they fit your business needs, functional requirements and budget.

## The Consequences

Without an RFP, you'll need to search vendor by vendor on an ad hoc basis – reviewing each LMS, discussing your needs, asking for a proposal and then accepting whatever response you receive. The contents of that response — needs analysis, solution description and requirements, as well as proposal structure, format, level of detail and submission date — are typically at the vendor's discretion. If your RFP is poorly designed, some of the vendors you have invited to participate will not respond. Suppliers who do not respond may have the best technological match for your requirements, but, you'll never know.

## Basic Elements of an RFP

The internet is full of LMS RFP templates from consultants and analysts, as well as vendors themselves. This often leads to choosing nothing at all or opting for one of the well-known generic learning management systems. These systems are more expensive, can do it all, but unfortunately, don't do anything remarkably well. You'll get a much better result by developing your own use cases and requirements, while using freely available templates only as a reference when documenting scenarios and specifications that map to your unique learning audiences.

Here are the most common sections that all RFPs generally include, such as:

- **Table of Contents**
- **Company Information.** This is the portion of the document that gives you an opportunity to explain who you are, what you do and your current situation that is the reason behind needing a new LMS. This can be in one section or split into two parts – company information and summary of business case.
- **Non-Disclosure Agreement.** An NDA is not required but since there is often times sensitive information involved, it is always a good idea to protect your business.
- **Feature List.** This section is typically where your business would list all the features or functions that you'll need the LMS to do. Sometimes it can be very broad or narrow in scope depending on the situation. Typical features include personalized learning paths, transcripts, CFR 21 Part 11 compliance, built-in authoring tools, SCORM and social features to name a few.
- **Budget.** Give LMS vendors a clear indication of what you are willing to pay for each of the deliverables you want to develop. Being up front and honest about your budget will allow LMS vendors to create a solution that fits within your budget constraints, rather than wasting time on developing an LMS plan that your organization simply cannot afford.

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- **Selection Criteria.** Be up front about how you are evaluating potential LMS vendors. What are the selection criteria that you will be using when reviewing the submitted proposals? Is low cost pricing a top priority, or are you looking for an LMS vendor that offers more client support services? Is experience level something that you are going to closely consider? Would you prefer an LMS vendor who is geographically closer to your organization?
- **Timeline.** A LMS RFP should provide explicit dates for submission of the proposal, the review timeline of the proposal and dates for when the work should start and finish. The vendor must be able to clearly identify all the due dates for the proposal. A table containing key events and dates is an excellent addition to any LMS RFP.
- **References**

## Overlooked, but Crucial, Elements to Include in an RFP

In the previous section, we discussed the basics of an LMS RFP, but there are a few key sections and things to consider that are very important, if not critical, to your success.

### RFP COMMITTEE

Choosing an LMS is never a one-person job so when writing your RFP you must consider the opinions and suggestions of your RFP committee.

An LMS impacts most every part of an organization so it makes sense that we have each of those departments involved to lobby for their specific training needs and perspectives – technical, instructive, administrative and financial to name a few.

Because of the impact and complexity of choosing an enterprise-wide learning solution, it is best to choose the selection committee carefully. Here are some individuals or departments that should be represented.

- Head Training/Learning & Development
- Procurement Department
- Learners
- Line Supervisors
- Business unit leaders
- sales and marketing department
- Information technology department



## 1. The IT department is very important to include during the RFP writing process and will be a big life saver down the line.

Vendors need to know about internal network, hardware and software, before they can intelligently make a recommendation. Provide information on current browser version, operating system, future upgrade plans and other IT information. For the vendor to come up with a fully compliant solution, he should be absolutely aware about the IT Infrastructure. Irrespective of type of implementation, onsite or offsite, one needs to involve IT department to understand infrastructure issues. Involving them at a later stage will

impact the overall timeline of the implementation.

## USE CASES

The most common thing companies do while writing an RFP is give a long list of features that they 'want' regardless if they need them or not. This can be problematic and can ultimately guide you down the wrong path.

A solution to this problem is to gather your LMS committee and come up with your top use cases that you'll need the LMS to work for.

For instance, let's say that Sally Smith, training manager, needs to be able to add an e-learning course that would be required for mid-management level staff in all departments but also optional for other departments. She also needs to add a test after the course as well.

Another example would be a department that needs to provide comprehensive reporting in order to receive government funds. They also have multiple territories that all have different training needs and requirements. To make it even more complex, all training must be kept behind the company firewall as well.

Providing a list of use cases give specific examples to your vendors of how the LMS will be used and gives them an opportunity to explain how their system can solve these problems.

It's still ok to include features in your RFP that you'd like but now you can map these features back to your most important use cases. In this way of organizing your RFP, your company can add priorities to each use case/feature/requirement to understand what's crucial, what's important and what's 'nice to have.'

## LEARNER PROJECTIONS

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It's not just important to include use cases and features that you'd like the LMS to have but also explain in detail who will be using the LMS. This will be very helpful for the vendor so they have a better understanding of your current and future needs.

Be sure to include the number of learners you are expecting to use the system in the first three years. So, as an example, this could be 1500 users in year one, 2500 users in year two and 3000 users in year three. Are these internal users, external or a combination of both? How frequently will they use the LMS? Infrequently, monthly, annually...?

## TECH INFO

The technology part of an LMS is just as important as the learning portion and is exactly why we stress getting your IT department involved from the beginning. This portion of the RFP should never be placed as an afterthought at the bottom, but front and center so vendors know if their system is even suitable for your particular situation.

Here is a sample of the types of questions you should include in the RFP:

- Where is the system housed?
- Do you have servers available in different countries? (Example: customer in Germany needs to have data center in Germany)
- Can your users access the system with a VPN?
- What browsers work with your system and what is the minimum version of each browser that will work?
- What is your bandwidth capacity?
- How often do you update the system?
- Do you provide a maintenance schedule? If yes, how far in advance is the administrator notified?
- How often do you back up the system?

## VENDOR PRODUCT INFO

The last section that is often overlooked when writing an RFP is including additional information about the future of the LMS, not just what it is today. For instance, find out about the current release date and how often their release frequency. How many individual clients they have and any planned upgrades and new releases in the next six months.

## What is ShareKnowledge LMS for SharePoint

ShareKnowledge is the first corporate LMS that is built on SharePoint – a dynamic, enterprise-wide training application that is integrated into all aspects of your business.

What is special about ShareKnowledge is that it enables companies to get the most out of their investment in SharePoint – utilizing existing infrastructure, processes and know-how which results in lower overall costs in upfront acquisition, annual per-user license fees and expenses related to support, deployment and integration.

As user's needs grow, so does ShareKnowledge. The system is completely scalable and adaptable with a list of features that continues to grow.

Benefits include,

- Simple, familiar user interface removes the stress of learning a new system.
- Personalized learning processes empower your people and drives performance.
- Detailed reporting draws a straight line between training and performance.
- Effectively reduce security risks associated with compliance.
- Build workforce competencies to align with strategic business goals.
- Social tools for engagement enable higher performing workforce.
- Get up and running with access to thousands of online training courses.

We hope you enjoyed this eBook and found the information we provided helpful. If you would like to learn more about ShareKnowledge, please click on the link at the bottom of this page.

