Checklist for Selecting an LMS

Let's get started

The Learning Management System (LMS) landscape is vast, with an array of options, creating an overwhelming selection process. This checklist, grounded in insights from experts at Valamis and in the L&D field, aims to streamline the decision-making process, ensuring you select an LMS that aligns with your organization's unique needs.

We created this checklist as a valuable and versatile tool to fit the unique way you work. You may print the checklist and enjoy the classic pen-and-paper experience. Or, if you prefer working on a computer (and reducing print waste), go for it. The checklist is interactive with PDF readers, supporting fillable form fields. Just remember to save the changes once you finish!

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Feedback or comments?
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Preparation

1. Identify organizational learning needs

The first step to choosing an LMS is understanding what you want from your L&D program. Without a goal, you won't know what to look for. Focus on your primary business objectives and how a new approach to employee training will support those objectives.

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Determine training goals and objectives.

Use the 'Five whys' method to dig deep into the root cause of requirements.
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Primary goals

Five whys

(1) Why?
Why do you need a new LMS?

(2) Why is that?

(3) Why is that?

(4) Why is that?

(5) Why is that?
Try to find the root cause

About this method

Selecting an LMS isn't just about offering courses; you must understand the 'whys' behind your needs. The five whys is an iterative technique used to drill down to the root cause of a problem by asking 'why' five times. Despite its simplicity, the five whys help understand the problem and ensure the product fits the real needs of your organization.

2. Define selection criteria

With your needs in mind, define your criteria for selecting an LMS, breaking down requirements into the LMS functionality to help meet your goals.

List out must-have features and functionalities.

Consider content types, ease of use, scalability, integration capabilities, and vendor reputation.

The desired selection criteria

3. Determine budget

In a perfect world, you could design an excellent, bespoke LMS that does everything you could think of and more. In reality, you will have to operate under budgetary constraints.

Consider all potential costs: implementation, licensing, maintenance, and possible customizations.

Consider long-term costs: the potential savings on offer through improved efficiency and productivity.

Budget range

4. Gather stakeholder input

Involve stakeholders from different departments in the selection process to get a diverse range of opinions to ensure your chosen solution will meet the needs of everyone.

Engage with administrators, learners, course designers, and business executives.

Collect feedback on desired features and potential challenges.

5. Create a feature checklist

Instead of getting swept away by an array of features, focus on the context: how the LMS responds to the needs of your industry.

Prioritize based on importance and relevance to the overall strategy.

Essential: User experience

User-friendliness: Both administrators and learners can navigate easily.

Customizability: Ability to adjust to your needs.

Accessibility: Accessible on various devices and browsers.

12 features we think every modern LMS should have

Course creation & management

Course delivery

User management

Enrolment & registration

Assessment & evaluation

Communications & collaboration

Tracking & reporting

Integrations with other tools

Customization & branding

Mobile learning

Multi-language & accessibility

Security & data protection

Notes on features (optional)

Selection

6. Research and shortlist vendors

Conduct market research to identify LMS vendors with solutions aligned with your requirements. Shortlist the vendors that best meet your needs and budget for further research.

Compare product offerings, features, and pricing.

Check for reviews.

Ask for references: Direct feedback from current or past clients can be invaluable.

Review pricing models

Subscription-based

Perpetual license

Pay-per-user

Shortlist of vendors

7. Send Request for Information (RFI) to vendors

Create a Request for Information (RFI) to delve deeper into the products from your shortlist of possible vendors.

Ask crucial questions to understand product capabilities and alignment with needs.

8. Evaluate shortlisted LMS solutions

Check returned RFIs against your feature checklist.

Collect feedback from stakeholders.

Request demos or trial access.

Shortlisted LMS solutions & related notes

9. Check for compatibility and support

Ensure the potential LMS solutions can seamlessly integrate with your existing HR and IT systems, the vendors follow security and privacy standards, and they offer adequate support and training.

Solutions under consideration

	option 1	option 2	option 3

Technical requirements

Needed integration capabilities

With existing systems (e.g., HRIS, CRM)

With third-party tools (e.g., Microsoft Teams)

Deployment

Cloud-based

On-premises

Hybrid

User scalability

The maximum number of users the LMS should support

Data security and privacy

Adherence to regulations like GDPR or FERPA

Review how the vendor handles data

Compare the data policies of the current vendor

Verify encryption methods and security certifications

Vendor support and training

Do they offer adequate customer support?
(e.g., 24/7 support, chat, email, or phone support)

Do they have adequate training resources?
(e.g., webinars, documentation, and tutorials)

Decision

10. Make the final decision and begin implementation

Select the LMS that aligns best with your organization's goals and budget.

Work with the vendor to plan and execute a smooth implementation process.

Begin training and monitoring.

Chosen vendor and related notes

Additional considerations for long-term success

Content quality: Ensure the content you deliver is relevant, interactive, and continuously updated.

Mobile support: Ensure the content is authored in a responsive format for mobile support.

Analytics: The LMS should track adoption and learning from day 1 so you can evaluate and iterate fast.

Integration with existing systems: Test and ensure smooth communication between all platforms.

Compliance and certification: Avoid fines and disruptions by ensuring compliance with regulations.

Benchmarking: Observe and learn from industry leaders.
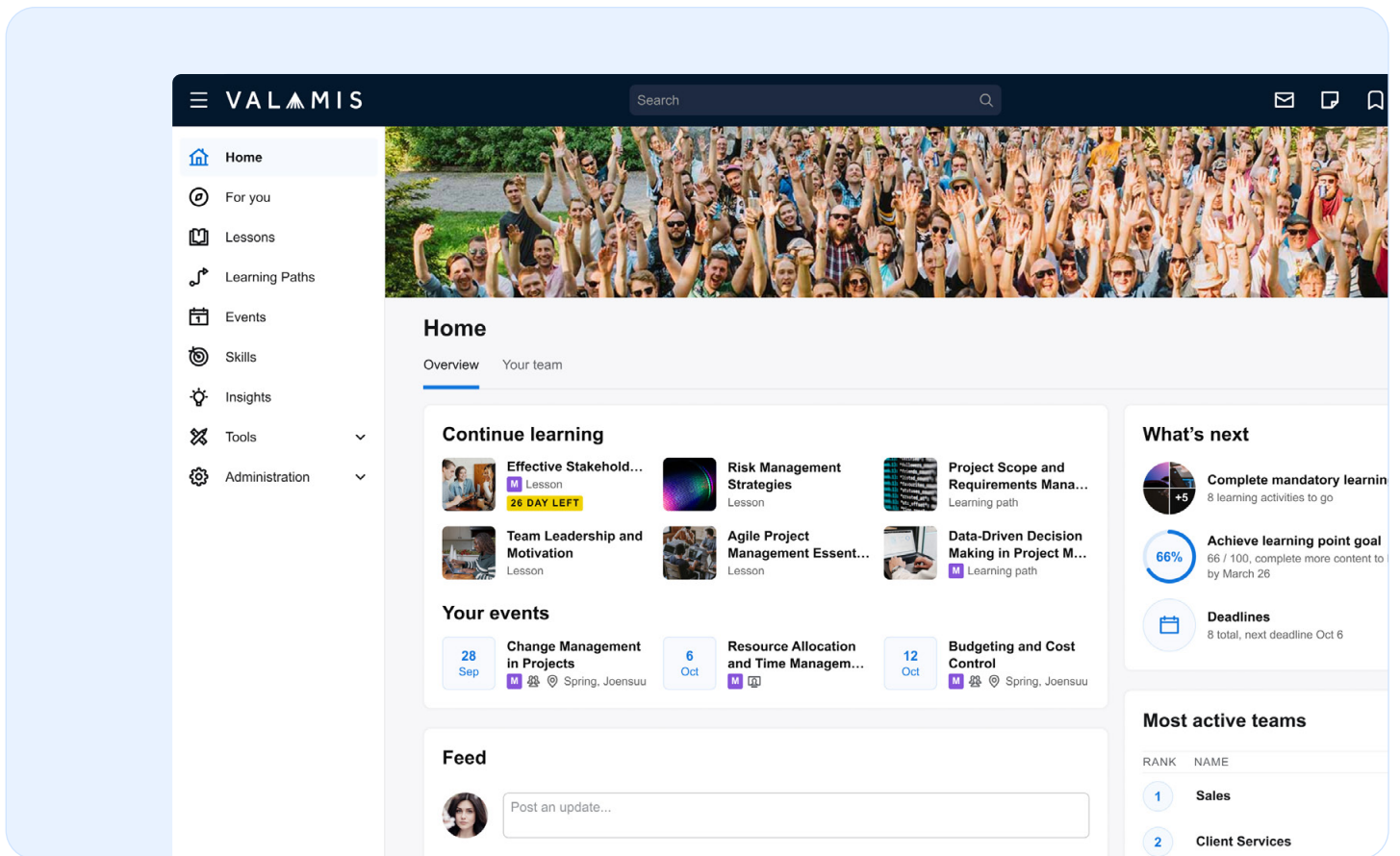
About Valamis

Request demo

Why spend time and effort managing and juggling multiple learning systems? The Valamis complete learning solution streamlines your learning tech, bringing everything together into one unified corporate learning platform, with maximum engagement and minimal clicks.

Combining the best of both learning experience platforms and learning management systems, with Valamis you never have to compromise on either. Deliver compliance training, recertification and certificates whilst driving self-driven learning, reskilling and upskilling.

As a modern SaaS solution Valamis can meet even the most demanding service requirements of finance, law, and manufacturing industries. We keep the platform constantly up-to-date, while your data stays always encrypted and on the same continent with you.