



Overcoming Common Pain Points When Switching to a New LMS

Susan Jacobs

with Tracie Cantu, Jennifer De Vries, and Debbie Richards

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Contact Information

Adobe Systems Incorporated

345 Park Avenue
San Jose, CA 95110
captivateprimesales@adobe.com

The eLearning Guild

120 Stony Point Road, Suite 125
Santa Rosa, CA 95401
info@eLearningGuild.com

Authors

Susan Jacobs with Tracie Cantu, Jennifer De Vries, and Debbie Richards

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Reviewer

Nipun Sharma, Adobe Systems



INTRODUCTION

Although some insist that the traditional corporate learning management system is dying, [MarketsandMarkets](#) strongly disagrees. The research organization has found that the LMS market today is alive and thriving; it projects that the market will expand from \$5.22 billion to \$15.72 billion by 2021. That staggering growth is projected to come from enterprises augmenting older systems, as well as those switching to entirely new platforms in order to take advantage of modern features.

While the selection and subsequent implementation of a new learning management system obviously differs among organizations, there are some common denominators. This industry paper will address the commonalities and recommend some best practices. Specifically, this paper will explore the signals that indicate it may be time to consider a new learning management system, and how L&D professionals can overcome resistance from those averse to change. To help organizations that have officially made the commitment to switch to a new LMS, this paper will outline the steps necessary to ensure a successful transition. It will examine some common obstacles and pain points learning leaders might encounter, and offer some practical tips to ease the migration process.

When should an organization consider a new LMS?

Numerous situations might prompt an organization to question its current learning management system. Usually, this occurs when the system lacks what the organization perceives to be a vital feature. Before cutting ties with a legacy system, it may be worthwhile to inquire whether the desired feature is on the vendor's development roadmap. It may turn out that the vendor has an upgrade in the pipeline with the desired capability, or it may be that the vendor has actually implemented that feature and all you need to do is change a setting. If, however, your organization deems xAPI a priority and the current provider is not even considering support for it, then that may signal that the time is ripe to part ways.

Here are some other scenarios that illustrate when an organization might want to investigate a new learning management system:

- When security issues or technological changes within the organization render the current LMS either obsolete or incompatible with other important enterprise systems.
- If the organization transitions from a human resource information system such as PeopleSoft or Oracle to Workday or SAP SuccessFactors, it may make sense to update to the HRIS's native LMS platform in order to take advantage of a sharply reduced rate. Remember, however, that sometimes cost is not the only deciding factor.
- When the organization wants to provide a customized UX design—such as learning recommendations or paths based on an employee's role, seniority, or competencies—but the current LMS cannot support such an initiative.
- If it is taking a lot of manual labor to gather the data to generate reports desired by management. Such reports can (and should) be available at the touch of a button. Bear in mind, however, that a new LMS might not solve the dilemma. What may be required is better integration of the LMS with another system, such as the HRIS.
- Likewise, if it is taking an increasing amount of manual work to ensure that users meet business requirements, it may be time to start shopping for a new LMS. For example: If multiple groups must complete training by a certain date in order to maintain compliance, L&D should be able to enter that date into the LMS and automate the process of sending email reminders to those who have not yet completed the requirements, as well as their managers.
- The process should similarly be seamless when registering groups of workers for a particular course or compliance training. If the system requires someone to manually enter data for each employee, it may be time for a new LMS.
- Although some level of user support is always required for an LMS, there is a problem when more users than normal complain about difficulties registering for, launching, or completing courses, or viewing their transcripts or certificates.
- When users are unable to take courses on the device(s) they prefer. For example: If an employee wants to consume a course at home on his or her iPad but the learning management system does not support that, it may be time for a new LMS. Note, however, that the culprit could be the content, not the LMS.

Adobe's philosophy to help clients migrate to a new LMS

Non-disruptive migration

An organization's training charter and schedule shouldn't be impacted when switching to a new LMS, especially when it comes to migrating terabytes of data. Adobe draws inspiration from agile methodologies to provide an iterative and simple incremental approach to migration. Migration is divided into multiple simple sprints. Once a sprint is tested with a smaller set of data, it can be reused to migrate the complete LMS.

Transparency and trackability

When switching to a new LMS, it is imperative that companies get a live report on how data, users, and content are being migrated. Adobe not only provides admins with a real-time dashboard to view the status of the migration process, but also gives them access to debugging tools that help rectify the exceptions without having to rebuild the complete data all over again.

Hand-holding support

Migration can be a complex process, and vendors should not wash their hands after selling their LMSs. As a standard procedure, Adobe assigns customer success managers to all large enterprise clients to help them migrate data from their old learning management systems.

Five steps to ensure a successful transition

When an official decision has been made to part ways with an older system and switch to a new LMS, the L&D team must shift into high gear. There is much to be done to ensure a successful transition.

- **Build a diverse team to provide project governance.** This team will align stakeholder needs to the organizational vision of learning and development, while simultaneously keeping the project on track and on time. Ideally, the team should include:
 - A strong project manager to lead the team
 - An executive sponsor to assist in prioritizing the project at an executive level
 - An IT partner to ensure that the new LMS meets corporate security requirements and properly integrates with other enterprise systems
 - An LMS administrator to act as a liaison between learning tech and learning strategy and manage ongoing configuration decisions
 - A lead from L&D to assist the LMS administrator in configuring the LMS, in line with the organization's learning strategy
 - A change management expert who can implement solutions to reduce change aversion during the transition
- **Define business processes and develop a robust set of LMS requirements.** Identify all groups that will be impacted by the new learning management system, and develop a set of common use cases to define their system needs. Driven by user data and business processes, write a robust set of LMS requirements. Group and prioritize the LMS requirements into those that are business-critical, important, and nice to have. Include them in the contract with the LMS vendor. Below is an example of a table of contents from an LMS requirements document.

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Individual buyer (one course, one person).....	8
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- **Select a vendor.** Today there are more than 600 learning management systems to choose from. While certain core functions will be similar (e.g., registration, completion tracking, reporting), many other LMS features will vary. In order to find the LMS that will best meet the needs of your organization, clearly define the business processes that the LMS will be required to support. Use these criteria to help narrow the search.
- Pre-qualify vendors. Most organizations have one to five business-critical LMS requirements that only a handful of vendors can meet. Investigate, either independently or with the assistance of a consultant, which vendors can meet those key requirements. Whittle the list down to a handful of potential partners, and invite them to submit proposals.
- Use the predetermined LMS requirements list to develop a scoresheet, and encourage decision-makers to use it to score vendor demos and proposals. Here is an example of a scoresheet:

5300 total users, plus 2500 using a separate portal				
Hosting/Integration	Weight (1-3)	Score (1-5)	Weighted Score	Notes
Cloud-based hosted solution, not on-premise LMS	3		0	
Ability to create customer portal for 2500 resellers	3		0	
Experience integrating with ADP	3		0	
Sends transcript to employee record in ADP	2		0	
Integrates with Webinar platform that doesn't require a plug-in (currently using Adobe Connect)	3		0	
Single sign-on with WebEx	1		0	
Tiered pricing or price per active user, not per registered course	3		0	
End User Platform/Device				
Does not use any plug-ins, such as Flash or Java	3		0	
Does not run courses in pop-up window	2		0	
Works on mobile devices, such as iPads	3		0	
Works for 98.5% of users who use Windows, iOS, Mac and Android	3		0	
Course window supports wide screen format (e.g. 1920 x 1080 and 1366 x 768)	3		0	
Supports Chrome, IE, Safari and Firefox browsers	3		0	
Works with older browsers, specifically IE	3		0	
Catalog/Courses/Learning Methods				
Manage course catalog in LMS, Purchase/eCommerce in AMS	3		0	
Search and browse functions that help users find appropriate courses	3		0	
Portal user to create customized versions of our courses; different courses in portal	3		0	
Webinars and recorded Webinars (20-70 users per event, at least 12 events per year)	3		0	

- Quantitatively review vendors based on input from the stakeholders, and have the team responsible for making the decision collectively assess and score how each potential LMS might meet, or exceed, organizational needs.
- Qualitatively review vendors based on stakeholders' likes, dislikes, and questions.
- **Choose the best fit.** There is no such thing as the best learning management system in the market, but there is such a thing as the best LMS for your organization. After careful consideration, pick the one that meets the greatest number of your requirements.
- **Begin project implementation.** The transition to a new learning management system requires the time, commitment, and cooperation of numerous players. IT will play a crucial role; the department must be fully on board before proceeding. The internal project manager will work closely with the LMS partner project manager. Together they should structure a project plan and flow charts, which will become the foundation for each stage of the implementation. Determine how much back-and-forth communication is ideal. Some vendors use an agile approach, regularly forwarding roughed-out screens based on your feedback. Other vendors use a systematic approach and provide detailed specifications for your review before development.

Overcoming common obstacles

It goes without saying that L&D professionals will encounter a variety of challenges when switching to a new learning management system. The most common obstacles tend to revolve around change aversion, cost, communication, and bandwidth. This paper will address each of these topics in greater detail.

Change aversion

A fear of change is natural and valid. While some employees will wholeheartedly embrace the prospect of switching to a new LMS, others may be less enthusiastic. Learning leaders must hone their change management skills in order to overcome resistance and advance the organizational agenda.

One of the best ways to allay the fear of change is to be transparent. Open several different channels of communication, and encourage employees to access them. Provide an online venue for frank user feedback. Create and maintain an FAQ section that includes updated launch information, and stage a series of webinars so interested parties can see demonstrations of the new system. For those who like a personal touch, make a member of the L&D team available to answer questions and quell concerns.

Use all channels of communication to describe and tout the benefits, ROI, and other factors that contributed to the business decision to switch to a new LMS. Do not try to sell the idea to users by simply highlighting the dazzling technology of the new system. The narrative should be tied to specific organizational goals. It may be helpful to assemble a team of influencers from across the company who can help rally support for the new initiative.

A different strategy may be required for high-level stakeholders. To sway them, calculate the labor cost of the current LMS—tracking the hours it takes to manually accomplish the tasks the LMS cannot handle, as well as the time it takes to support an LMS that is difficult for users to navigate. A presentation of the hard numbers will be eye-opening. In addition, show management the valuable data that can be mined from modern systems, and provide some examples of what the company can do with the data. Finally, encourage decision-makers to take a short course (five minutes or less) in the existing LMS, and compare that experience to taking a short course in an LMS with more sophisticated features. This often illustrates the point in a profound way.

Cost

A new learning management system represents a significant investment, and controlling costs is a universal concern. According to one expert, the best practice for controlling costs "is to make sure that everyone is on the same page about business processes and requirements *before* doing too much work on integration and customization."

When exploring potential platforms, advise the vendor to inform you when any feature being demonstrated is not part of the standard LMS package and would incur an additional cost to implement. Costs can creep upward very rapidly when you discover that the features you like most are a la carte options.

Make sure that everything is clearly itemized on the contract, including any promised discounts. Check for additional implementation charges. In a [blog post](#), analyst Craig Weiss warns of LMS setup fees, noting that ad hoc and miscellaneous fees can add up quickly.

Beware of unseen expenditures. According to an [article](#) in *Learning Solutions* by industry veteran Steve Foreman, the average length of time to transition an LMS with moderate complexity for a business with about 10,000 employees is nine months. To accommodate the time for configuration, user acceptance testing, pilot, and launch, an organization will have to run both systems concurrently for roughly a year. The cost of running two systems, plus additional implementation and professional services costs, must figure into the financial equation.

In large organizations, justifying and then getting approval for a change order can take time, halting project work. To circumvent this potential problem, fully document your requirements in the selection process. Since you never know what may happen during implementation, try to secure a contingency budget to handle unanticipated expenses.

Although everyone bears some responsibility, it is the duty of the project manager and executive sponsor to keep the project scope and timeline in check, which in turn can help keep costs in line with the projected budget.

Communication

When implementing a new learning management system, misunderstandings can arise between an organization and its LMS partner. The best remedy for this is good communication. Most LMSs are highly customizable and configurable, and can be integrated with many other types of systems. In order to maximize LMS implementation success, the entire project team needs to communicate regularly and effectively about the business processes that the organization needs to support, and how the LMS can best streamline and automate those processes. When organizations fail to spend enough time working through the complex technical decisions required to implement an LMS, the vendor is left guessing about what would best serve the organization's needs. At a minimum, there should be weekly meetings or check-ins to work through such issues.

Bandwidth

Modern organizations tend to run lean, which requires individuals to manage multiple priorities and projects at the same time. It is very easy to take on too much and then regret the decision. It is critical during an LMS transition to know that all project and governance team members can meet the time and workload commitment to bring the project in on time and within budget projections. Before embarking on the implementation of a new learning management system, make sure those who will be crucial to the success of the project have the bandwidth to see it through.

Easing the migration process

The migration of data and assets from one LMS to another must be handled with extreme care. Many questions will arise. Are you going to transfer all historical training records? If not, how far back should you go? Do you need to integrate data from existing legacy systems into the new LMS? Will you use automated data transfer tools or have to manually load employee data? Are there any new requirements that you need to track or update? Make time to consider all of these points.

At a minimum, experts recommend backing up all user data, including profiles and transcripts. Consider two important factors: (1) Is it legally required, and (2) does it negatively impact employee relations?

As a general rule of thumb, back up most training courses and their usage history, and maintain a separate copy in case auditors need access during data migration. Also, if training is required for an employee to achieve a career milestone such as a pay raise or promotion, back up and maintain those items separately.

Be especially careful with compliance-related data. As one industry expert points out, "Compliance training required by your company is important, but compliance training required by the Sarbanes-Oxley Act is another thing altogether." Make sure to migrate all compliance data required by the company, by third-party auditors, and by federal entities.

Older data unrelated to course completions is less crucial to migrate. For example: The old LMS might have an email or messaging system. Instead of transferring all messages, it may be acceptable to target just those that are one year old or less.

Ideally, all existing data and assets will "magically" flow into the new system; however, the process is rarely so seamless. Sometimes the fields in an existing database do not correctly populate into the new database. Test everything with a pilot group before going live. Ask IT to develop a strategy to prioritize the fixes and provide support.

One final note: Although the old LMS vendor may understand your organizational need to switch systems, they may not be totally cooperative when it comes to transferring your data to a new system. It may be necessary to pay the old vendor to authorize the manpower necessary to transfer the data. Be sure to include this potential expenditure in the budget.

Big bang vs. phased migration

Migrations can be done in either of two ways: big bang or phased. There are advantages and disadvantages to both strategies. Big bang migration is done in one fell swoop. The entire dataset and all assets are moved, usually during a planned downtime such as a weekend. The pros are that the cost is lower, the implementation is shorter, and everyone gets exposed to the new system on the same day. The cons are that details could be overlooked and there is greater risk of a complete system failure.

A phased migration is done more slowly, usually employing a beta test group. The advantages of a phased migration are that it carries less risk and provides time for issues to be addressed. The disadvantages are that the implementation takes longer and costs more.

Consultants believe that phased migration makes sense for large implementation projects, where there are more than 10,000 users. The practice is less important for smaller organizations with fewer than 5,000 users.

A best practice for organizations that decide to embrace phased migration is to identify a pilot group. Switch the pilot group to the new LMS for a period of 30 days. Address all reported defects and concerns. Then you can upload the final delta file and roll out the product to the entire organization.

Safeguarding against the interruption of training during an LMS transition

A key concern for L&D professionals is that training should not be interrupted during an LMS transition. A wise person once advised to plan for the worst and expect the best. A sound project plan will allow for a period of user acceptance testing, followed by a pilot group launch.

It is important to have a cushion period to work out any potential kinks. The overlap period will allow L&D to redirect users to the old learning management system, should a critical error occur with the new LMS.

A best practice is to pick an end date for assigning courses in the old LMS. Make sure that students have completed all training, and close registration to any new training in that system right before turning it off. Communicate when the new LMS will go live, and then switch it on with confidence.

CONCLUSION

The decision to replace or augment a corporate LMS is not made cavalierly. There is a significant financial investment, as well as concern for the general upheaval that may result when shifting to a new learning management system. This paper has provided some actionable tips for overcoming common pain points when switching to a new LMS.

Adobe's LMS Solution: Captivate Prime

The graphic is a promotional banner for Adobe Captivate Prime. It features a bright yellow background on the left and a black background on the right. In the top left corner of the yellow section is the Adobe logo. Below it, the text 'HAPPY TAPPY' is written in large, bold, black letters. Underneath that, in smaller black text, it says 'The jig you break into when your LMS experience is all good.' Below this is the text 'Adobe Captivate Prime' in bold, followed by 'LMS experience. Redefined.' in a smaller font. To the right of the text is a cartoon illustration of two white sneakers with yellow laces, appearing to be in motion or jumping. On the black background on the right, the text 'Request a demo of Adobe LMS' is written in yellow, followed by a yellow chevron arrow pointing to the right.

HAPPY TAPPY
The jig you break into when
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[Click here](#) to learn more about Adobe Captivate Prime, Adobe Systems' state-of-the-art LMS solution.

ABOUT THE AUTHORS



SUSAN JACOBS

Susan Jacobs is a senior editor with The eLearning Guild. She has a deep-rooted interest in and passion for education and technology. Prior to this position, she was a senior content producer at Bright Business Media, a leader in the meeting and events industry. Susan is a graduate of Northwestern University's Medill School of Journalism.



TRACIE CANTU

Tracie Cantu is the founder of the Combs Cantu Group, a talent development firm that specializes in helping businesses create employee experiences that increase retention, improve performance, and build bench strength. Tracie has worked in HR and talent development for more than 15 years, with clients ranging from Fortune 100 companies to nonprofits.



JENNIFER DE VRIES

Jennifer De Vries is the president and chief solutions architect at BlueStreak Learning. Jennifer, a Certified Performance Technologist (CPT), has over 25 years of experience managing eLearning programs for companies such as IBM and Motorola. She frequently writes about eLearning for industry journals and is best known for her report *Rapid E-Learning*, published by Bersin & Associates. In 2010, Jennifer was named one of the 20 most influential people in online learning by Online University Rankings. In 2016, she was named Most Influential Woman in eLearning by Corporate America News. BlueStreak Learning focuses on helping organizations start and grow high-quality, customer-focused eLearning programs.



DEBBIE RICHARDS

Debbie Richards is the president of Creative Interactive Ideas. She was named one of the most influential people in corporate eLearning for 2017. Debbie serves as a consultant to corporations and organizations, working with clients to design, develop, and deliver adult learning programs with measurable impact through the use of emerging technologies.