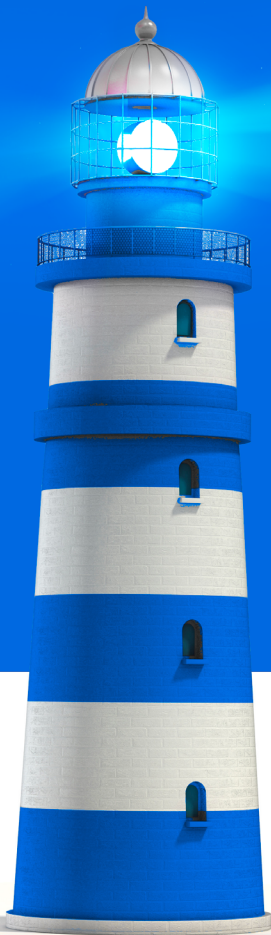


The ultimate guide to learning platform consolidation

Change management best practices
to support your entire organization.



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A best practice for every company is to periodically review their technology stack and associated processes to look for potential efficiency gains. We recommend that teams do a lightweight evaluation every six months and that companies undertake a deeper evaluation every 12 months. As programs grow and evolve, it is natural to end up with duplicative systems, unnecessary cost, or processes operating in isolation. The goal of a periodic technology review is to maximize the impact of your time and budget.

This playbook is a step-by-step guide for how to evaluate and consolidate multiple Learning Management Systems (LMS).

Before you begin, it helps to take a holistic view of this activity and development alignment around the specific goals you hope to achieve.

Overview

WHO SHOULD BE INVOLVED IN THE PROJECT?

- ✓ C-Suite sponsors
- ✓ Finance & procurement
- ✓ Training & Education team leads
- ✓ LMS admins
- ✓ Vendor solutions architects
- ✓ IT integrations & data team
- ✓ Marketing (GTM / Campaign launch)

HOW LONG DOES A TYPICAL REVIEW TAKE?

TOTAL: 6 - 8 months

- ✓ Inventory & discovery (3 months)
- ✓ RFP creation (<1 month)
- ✓ Vendor evaluation (1 month)
- ✓ Integrations & learner experience (1 month)

SUGGESTED RESOURCES FOR THE PROJECT

- ✓ Assessment of need template
- ✓ Alignment team meeting guide
- ✓ LMS team lead question checklist
- ✓ Capabilities Matrix
- ✓ RFP Template for LMS selection

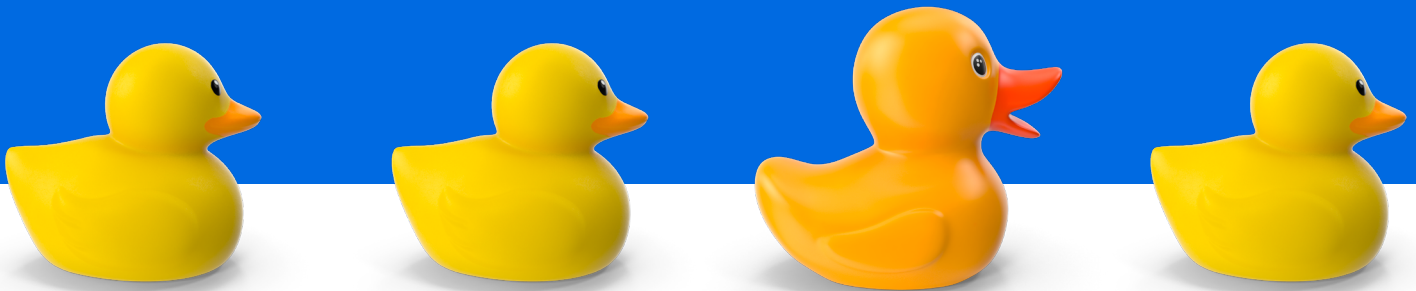
The value of consolidation

The most common benefit from technology consolidation is the reduction or elimination of duplicate expenses. Most LMS platforms have similar core features, but platforms like Docebo—which can seamlessly handle multiple use cases—are a relative outlier. You will likely discover that if one platform can serve most of your use cases, the cost savings of consolidating onto that platform are significant.

However, there are often hidden areas of value you should take into account. A significant one relates to simplifying the learning experience by consolidating disjointed learning experiences across multiple systems with different logins. Another common area of value is found by streamlining production processes and bringing together similar resources into a single organization. Consolidating systems provides more value than simply reducing capital expenditures. It also delivers value from more efficient operations.

When forecasting the ROI of an LMS consolidation, consider all of these potential areas of value:

- ✓ Reduced spend on technology
- ✓ Lower support and professional services costs
- ✓ Improved data accuracy
- ✓ Simplification of production workflows
- ✓ Improved continuity of operations



TIP

Begin with the assumption that internal and external education teams can use the same system and then work to disprove this assumption, rather than start from the commonly held belief that the same system cannot work for both. Technology has advanced considerably in the last few years and so it's important to look at this opportunity with fresh eyes.

Considerations for bringing together internal & external systems

Many companies view internal and external training programs as completely different. Though they often have different objectives, the technology used to deliver training for both of these audiences is typically the same. Consolidating your internal and external learning platforms can provide tremendous value; not only in direct cost savings, but also by helping expose process inefficiencies that can be optimized.

A partner can help. For example, Docebo has a team of Solutions Architects who can guide you through this process, providing guidance on how to consolidate systems, build integrations between them, and create efficiencies while improving learning and business outcomes.

The process of consolidation:

7 Key Steps

The process outlined enables you to efficiently move through the consolidation steps in a way that can identify the magnitude of the opportunity as well as determine whether consolidation will serve the expected benefits, while also identifying when consolidation will result in unforeseen negative outcomes.

1 Assessment of need

This is a research phase that occurs prior to the launch of the project. Consider setting up preliminary meetings with different teams to develop and check assumptions about your company's current state. The information collected during this stage will be used during the next phases. Use an [Assessment of Need template](#) to answer some questions about your organization's training activities. If your analysis suggests LMS consolidation can provide value, proceed to the project formation stage.



2 Project formation

This stage is where you earn buy-in from executive leaders and create organizational alignment. It ends with a kickoff meeting amongst participating stakeholders.

Here are the steps and considerations you should include in the project formation stage:

NOTE

The most critical factor that extends the timeline of these projects is a lack of organizational alignment. When one or more teams is not included in this process, it often results in significant delays later on.

INTRODUCE PROJECT TO EXECUTIVE LEADERSHIP

Create a short presentation for your executive leaders based on your [Assessment of Need](#). Keep this presentation to only a few slides, with the goal of forming a small committee of executive sponsors. These sponsors should consist of leaders who oversee training operations and delivery across the company. We don't advise seeking commitment to consolidate technologies at this point, as that may make some leaders uncomfortable. Simply ask for a handful of leaders to commit to meeting for 2 hours to discuss feasibility and alignment.

ALIGNMENT TEAM MEETING

Schedule a 2-hour meeting with the executive stakeholders assigned to this project. You should have one c-suite executive in attendance who has the authority to delegate or assign actions to the attendees. For small organizations, this might be the CEO. Use the [Alignment Team Meeting template](#) to help structure this conversation.

There are two goals for the Alignment Team Meeting:

1. Establish a clear go/no-go decision from c-suite executive
2. Define role expectations for the different stakeholder teams

Many teams use a RACI chart or similar to define and communicate roles (Responsible, Accountable, Consulted, Informed). This will help you streamline decision-making and set expectations.

If the team decides to move forward, have the executive leaders who own each training team personally inform their teams about the decision—before the first kickoff. This is often better than having someone from outside the team sharing the proposal. The executive leader for the team should set expectations for participation and describe the business objective that the company is aiming toward. This helps the designated project champion establish themselves.

3 Kickoff

A project kickoff is critical to establishing alignment across the stakeholder teams. This is typically a single 1-2 hour meeting where a large group of stakeholders are introduced to the project, timelines, expectations for their participation, and given an opportunity to ask questions.

In a Learning Platform consolidation kickoff meeting, it's important to:

- ✓ Have executive leaders communicate their business objectives
- ✓ Announce the project champion and clarify the champion's role in the process
- ✓ Announce the stakeholders and clarify their roles
- ✓ Communicate the timeline and major milestones
- ✓ Collect the names and roles of people with relevant information or perspective on processes and systems

At the end of the kickoff meeting, the next major milestone is to complete an inventory of the systems, people, and processes involved in training delivery across internal and external audiences.

During or shortly after the kickoff meeting, set initial meetings to begin taking inventory of your current learning solutions.

NOTE

It is important to create a sense of transparency and to specifically note that headcount reductions are not the goal of the initiative. Often, fears of headcount elimination can make buy-in difficult from the various stakeholders.



4 Discovery

During the inventory stage, use the [RFP Template](#) to create a side-by-side comparison of your main learning platforms and identify the most critical features by team. Additionally, the RFP Template enables you to compare programmatic aspects, like which learner groups are being served and the total budget being allocated to these solutions across your organization.

As you develop this resource, identify the platforms which cannot serve multiple use cases. By eliminating these early in the process, you can dramatically reduce the time required to evaluate vendors later on. Remember: You should start from the assumption that a single platform can serve multiple audiences and functions.

The best place to begin your investigation is with your IT or finance department. They will have a list of all vendors as well as the internal owner of the systems. Use this list to identify the main learning technologies being used. Some things to get from your IT or finance team related to these systems:

- ✓ Which systems are under contract?
- ✓ The price of each system
- ✓ The contract duration
- ✓ How much has been spent on professional services?

After identifying all the current vendors, meet with each training team leader and interview them. Go beyond an assessment

of features. Seek to understand processes, KPIs, people, roles on the team, and audience needs. Add this information to your spreadsheet. Here are some example questions you may want to ask these teams:

- ✓ How many learners are being served?
- ✓ How many instances do they have?
- ✓ What is the structure of the payments & SKUs?
- ✓ What is the structure of admin user permissions?
- ✓ What are the surface level metrics being tracked? (Engagement, enrollments, completions, monthly active users, etc.)

Once your inventory is complete, schedule another group meeting to begin the evaluation phase. The objective is to give training team leaders a method for ranking the importance of platform capabilities and identify platforms that can't serve multiple use cases.

5 Evaluation

During the Discovery stage, your team developed a centralized reference for all the features and capabilities used by your learning programs. You have identified solutions that can't support multiple use cases.

The next step is to have each team rank the importance of features. The objective is to develop a shortlist of vendors that can meet your company's needs. In many cases, you'll find that there is only one vendor amongst your current technology solutions that can serve your needs. This process helps you save time on evaluation and move quickly to selection.

Using the [RFP Template](#), have each team provide their 1-4 ranking for each feature on the list. Use the following scale when having the teams complete this activity:

4 - Mission critical

3 - High preference to keep

2 - Nice to have

1 - Not needed / NA

Prior to sending out any RFPs, meet with your stakeholder team leaders one last time and review the following:

- ✓ Are the KPIs for each team accurate?
- ✓ Are the non-negotiable items clearly represented?
- ✓ Are the learner groups clearly articulated?
- ✓ Do they agree with the priorities that have been listed by feature?

With this information, you can total and average the scores provided by your stakeholders to determine which amongst the teams are broadly viewed as important. Having this scoring method makes it easier to communicate your priorities to learning solution providers.



6 Vendor review & selection

Following the evaluation stage, you should have a shortlist of 1-2 learning solutions providers worth considering. You have completed an internal review of capabilities and now it is time to get an external review of your feature priorities.

Contact your Account Manager for assistance with this process. They can help identify whether new features, alternative configurations, or platform customizations can be used to meet your needs. Leverage the knowledge of your vendors when you develop your final recommendations. It's helpful to look at your existing platforms with fresh eyes as the solutions architects can expose potential areas of new value from a technology you already have.

With vendor assistance, this process can take as little as a month. Without vendor assistance, selection can take considerably longer.

This stage is completed when your team shortlists and then selects an LMS vendor.

7 Create a launch plan

As you near the end of your vendor selection process there are two critical activities to map out. Both of these experiences will help make your consolidation process run more smoothly.

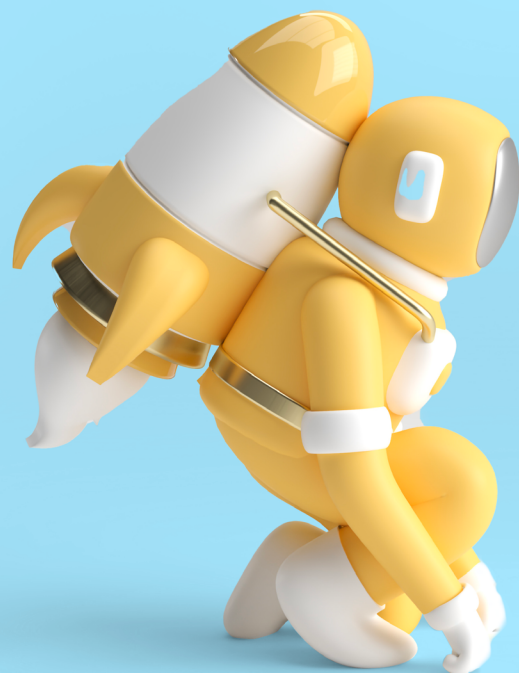
1. Integrations and data flow
2. Learner experience

Work with your IT team to create a map of the integrations and data flows required. They should have a clear articulation of the reports you need to create, how systems are expected to function together, and how the learners will access or transition through different parts of your tech stack.

NOTE

The technical aspects of transitioning from one system to another have the tendency to become the sole planning function of the consolidation team. Don't forget about the user experience of your learners and what the transition looks like from their perspective.

The other mapping exercise is to consider the impact that your platform change will have on your learners. You should work with your go-to-market (GTM) team to prepare a communication and migration plan, as needed. It is possible some learners will have their login credentials changed or have to locate their certifications in a different user interface. Document the user flows and make a plan for the experience you will deliver to them when the new technology is rolled out.




Conclusion

Consolidating multiple LMS platforms can unlock significant value and dramatically improve the ROI of your training programs. But the process of consolidation is as much about technology as it is about people. When starting this process, transparency, alignment, and a thoughtful consideration of different teams' unique perspectives is one of the key drivers of success later on.

The following are some additional best practices to keep in mind:

- ✓ Re-organization and headcount reductions are often not necessary, but alignment between learning teams is required. To ensure you make the most of your training resources, establish a working group amongst the training leaders that persists beyond the consolidation process
- ✓ Become deeply familiar with each team's content production processes and look for ways to optimize efficiency and output. A good practice is to centralize the content roadmap and backlog management processes. Look for duplication, overlap, or places where the same learners are being targeted.
- ✓ Ensure that the vendor you choose can partner with you to ensure a smooth implementation. Docebo has a large team of experienced Solution Architects and Technical Account Managers that have managed thousands of implementations for countless types of organizations. They can make recommendations on how to integrate systems and manage production processes efficiently.



- ✓ Communication and transparency about roles are both key to any change management process. Establish strategies for effective communication, task delegation, and accountability by using a RACI chart or similar.

- ✓ Make a change management plan. You won't just be consolidating technology. You may realign organizational structures and reimagine operational processes. As you execute your consolidation plan, enlist help to build out a change management plan. Focus on the value that the company will get when all the teams are more closely aligned.

**Speak to
your account
manager about
how you can
consolidate
your LMS tech
stack today**

[LEARN MORE](#)

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ASSESSMENT OF NEED TEMPLATE

Use the table below as a template. List out different issues and identify whether the qualities in your organization are positive or negative.

| ISSUE | NEGATIVE | POSITIVE |
|--|---|--|
| <p>Siloed teams Are the backlogs shared? Are aligning meetings taking place?</p> | <ul style="list-style-type: none"> ✓ Lots of headcount on different teams ✓ Similar titles & functions have different or obscure objectives | <ul style="list-style-type: none"> ✓ Different teams utilize the same production resources ✓ Roles, titles, and leveling guides are aligned across teams |
| <p>Siloed content When content is produced for the same audience, is it stored in different systems?</p> | <ul style="list-style-type: none"> ✓ Learner has to use more than one login to access all available training ✓ Coursework is completed in multiple systems | <ul style="list-style-type: none"> ✓ User access to all learner accounts is centrally controlled ✓ Content is easy to discover |
| <p>ROI Can you show that the LMS is actually delivering the value needed?</p> | <ul style="list-style-type: none"> ✓ One or more teams don't evaluate cost vs ROI of their LMS ✓ Cost of LMS systems are not known or evaluated on a regular schedule or cadence | <ul style="list-style-type: none"> ✓ Learning technology costs are known and summarized ✓ Sophisticated metrics related to learner behavior are tracked & reported on to executive stakeholders |
| <p>Measurable impact Do you have the data you need to inform decisions and demonstrate impact?</p> | <ul style="list-style-type: none"> ✓ One or more teams lack measurable goals ✓ Training functions target the same goal but don't coordinate their activities | <ul style="list-style-type: none"> ✓ Different teams regularly discuss and coordinate initiatives ✓ Different systems feed into a single database and are analyzed together |
| <p>Content production costs Do you have visibility into the overall programmatic costs of the education teams (headcount, etc)?</p> | <ul style="list-style-type: none"> ✓ Training may be happening 'behind the scenes,' with limited visibility to other groups ✓ Multiple teams have the same or similar roles that operate independently of one another ✓ Handoffs between production teams are ad hoc or undocumented | <ul style="list-style-type: none"> ✓ All training teams meet periodically to discuss headcount allocation ✓ Training teams share a single production backlog ✓ Handoffs between production teams are done using a systematic, transparent process |
| <p>What is the maturity of the teams? Do all teams have the same level of maturity?</p> | <ul style="list-style-type: none"> ✓ Different teams in the same company have disparate levels of maturity ✓ Some training managers struggle with challenges that are easily solved by other managers ✓ There is no established knowledge sharing process across teams | <ul style="list-style-type: none"> ✓ Different teams have a similar level of understanding about best practices ✓ Training teams meet periodically to share knowledge and overcome development challenges |

If your organization has more than two areas that you consider "negative" using this table, then you will likely benefit financially from undertaking a consolidation initiative. You should proceed to the project formation stage.

ALIGNMENT TEAM MEETING TEMPLATE

During the alignment team meeting you should answer the following questions:

| QUESTIONS | CONSIDERATIONS |
|--|---|
| What is driving this consolidation initiative? | <p>It helps to have a clear goal in mind. Each of the following are common benefits of consolidation, but it helps to align on a single goal to keep all the teams focused when it's time to select a solution.</p> <p>Typical goals include:</p> <ul style="list-style-type: none">✓ Cost savings✓ Developing more consistent data✓ Improving the learner experience |
| Which teams are in scope? | <p>Often, companies have several different training or enablement programs, even if they aren't formally defined. Develop a Stakeholder chart (also called a RACI chart) that lists who amongst the teams should participate or be informed about decisions)</p> <p>Some common teams to consider:</p> <ul style="list-style-type: none">✓ Customer education✓ Customer onboarding/implementation✓ Learning & development✓ Partner enablement✓ Compliance training✓ Sales enablement✓ Customer success enablement |
| What timeline considerations need to be made? | <p>Take an inventory of major projects, deliverables, announcements, and seasonal activities that could impact the consolidation process across all the in-scope teams. Place these on a calendar or timeline so you can develop a mitigation plan or account for them accordingly.</p> |
| Who will lead this initiative? | <p>Cross functional initiatives need a single champion with delegated authority. They must be empowered to drive toward completion and serve as a single point of contact when issues arise. Ideally you will get verbal commitment from the meeting participants that they agree to work with the project champion.</p> |

LMS LEADER INTERVIEW GUIDE

Setup time with each team leader to understand their programs at a high level. It's important to look beyond just the systems used and dig into the programs' deeper purpose.

| QUESTIONS | CONSIDERATIONS |
|--|---|
| Who are you training? | <ul style="list-style-type: none">✓ How do you define your learners✓ How do your learners typically find your solution✓ Do you have learner personas or archetypes✓ What challenges are your learners facing that training seeks to resolve |
| What is the objective of your training solutions? | <ul style="list-style-type: none">✓ What measurements do you use when reporting on your program?✓ Who consumes these reports?✓ What systems provide the data for reporting?✓ What are your current OKRs/ business objectives?✓ How have the objectives changed over time?✓ Do you expect or plan to have the objectives change in the near future? |
| Is there any eCommerce or payment taking place | <ul style="list-style-type: none">✓ What is your pricing model✓ Describe the workflow involved in payment processing✓ How much revenue is generated✓ How is the revenue recognized✓ Do you have plans to change the monetization offering in any way? |
| Do you provide any validated training? (training has this required by law) | <ul style="list-style-type: none">✓ Which courses are validated training✓ Which learners do these serve✓ How often are these renewed✓ Do you have plans for more validated learning offers in the future✓ Describe the workflow learners use to confirm they have completed training |
| Do you serve multiple regions or languages | <ul style="list-style-type: none">✓ Do they have regulatory requirements such as GDPR✓ Which regions do you serve✓ How many learners in each region✓ How many languages do you deliver training in✓ Describe the unique needs of each region, if any |
| Do you have accessibility requirements? | <ul style="list-style-type: none">✓ Describe the accessibility requirements you have✓ Describe any outstanding accessibility improvements needed✓ Are their specific accounts or industries you use as your accessibility standard |
| Who owns the roadmap for development? | <ul style="list-style-type: none">✓ Describe how you prioritize content development✓ What systems or processes do you use to manage your backlog✓ Who is involved in prioritization of content |
| Are there learner groups that need to be isolated? | <ul style="list-style-type: none">✓ Do you have learner groups that need to be isolated✓ If so, what specific data or aspects require this isolation✓ How do you manage that isolation currently |
| Are there certificates being administered? | <ul style="list-style-type: none">✓ Do you manage certificates✓ Do you plan to create new certificates in the near future✓ Walkthrough the process of administering a certificate✓ Where do learners share their certificates✓ Are the certificates you offer used to gain employment or salary advantages |