Choosing the Right Extended Enterprise Learning Management System

Essential Requirements

Choosing the right learning management system (LMS) for your company can be a daunting experience. There are many systems to choose from and each has been optimized for a different type of learning, goals, learners, instructors and organizations. What are your training goals? Who are your learners? Is your training global or going to be in the future? Do you report your revenue to finance on a monthly, quarterly or annual basis? Is your training for partners, customers, resellers or internal users? What will your training look like 2 years, 5 years or even 10 years from now? Try to anticipate your future training needs as much as possible and choose a learning management solution that will grow with those needs.

This white paper has been designed to give you a comprehensive list of the essential features and functionality needed for a global, external learning management system for customer, partner and reseller training. It can used to compare the LMS systems you are reviewing.
Platform Features

Why is the platform important? Look at your current education management infrastructure and ask yourself:

- Do I have dedicated IT resources for issue resolution and upgrades?
- Do I have the hardware I need?
- How long does it take to update the education website?

A SaaS (Software as a Service) cloud-based LMS solution eliminates the requirements for internal hardware and software installation, and maintenance by your IT department. It gives your team 24/7/365 access from any computer with an internet connection and web browser.

You will have the tools needed to control your revenue-generating education portal. Easily list a course, change a link or create a new certification without having to wait for IT or a web developer. Add and edit your content using the LMS’s Admin tool in your web browser and your updates are instantly added to your student facing learning sites.

Interface Customization

- Cloud-based software as a service (SaaS)
- Customizable site branding
- Modular design that allows adding functionality as needed
- Configurable student-facing views (catalog, search, etc.)
- Easy organization and filtering of courses including location, category, course name, etc.
- API support for portal and backend system integrations
- Salesforce.com integration
- Instant updates to the customer-facing education portal

International Training Support

- Localized branding for student sites
- Multiple languages and currencies
- Localized pricing
- Localized taxation
- Currency exchange rates for reporting
- Location-specific revenue recognition rules
- Specific payment methods for specific countries

Testing/Assessment Integration

- Assessments before, during and after learning
- Ability to review and deploy tests in shared repositories
- Organize questions by topics and sub-topics, and classified by difficulty levels and other criteria
- Blended delivery – assess, schedule and deliver once – online or offline
- Reporting and analytics
- Ability to integrate third-party testing and assessment tools

Security

- Security (user ID and password)
- SOX-compliant password management
- Automated “forgotten password” support
- SAML 2.0– single sign-on (SSO)
- PCI compliant
- Roles and permissions
**Blended Training Environment**

An extended enterprise/external learning management solution includes a blended information delivery and data collection approach. In addition to standard features that include automated communications, an information management database and a registration process, the LMS should be configured to include modules tailored to specific training delivery needs.

Training delivery methods include:

- **Instructor-led – multiple physical locations**
- **Virtual classroom – interactive web conferencing**
- **eLearning – self-paced, asynchronous training such as prerequisite coursework, regulatory and compliance programs, and soft skills certification**
- **On-demand – recordings that extend the life and value of web conferencing sessions and other content including pdfs, presentations, images and documents**

**All Methods Should Include These Features**

- 24/7 online registration and administration support
- Automated course creation, scheduling and removal
- Automated wait listing and cancellation
- Automatically mark students attended
- Class expense tracking
- Configurable, macro-driven automated email communications
- Customizable registration fields
- Individual and group registrations
- Instructor scheduling and conflict checking
- Payments and e-commerce
- Robust reporting and data exports
- Recurrence

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**Additional Classroom/Instructor-Led Features**

- Facility scheduling and conflict checking
- Equipment scheduling and conflict checking
- Local amenities, such as hotels and parking
- Pooled seating
- Support for private on-site classes

**Additional Virtual Classroom Features**

- International localization
- Third-party integration with tools like Adobe Connect, Cisco WebEx, Citrix GoToTraining, Microsoft Windows Live Meeting, etc.
- Support for private on-site classes
- Automated attendance

**Additional eLearning Features**

- Class access control (duration, number of launches)
- eLearning content hosting
- Ability to link to external content
- Multilingual content options
- Regulatory compliance programs
- Self-paced and on-demand training
- Sharable Content Object Reference Model (SCORM) – ensures that all file packages are easily transferred and supported on multiple platforms
- Support for private offerings

**On-Demand**

- Automatically publish recorded session from Virtual Classroom session
- Automatically inherit Virtual Classroom pricing and options
- Class access control (days, number of views)
- Configurable default behavior
- Link to a Virtual Classroom or create a standalone session
- Virtual Classroom students may automatically receive access
- Host video, PDF’s and any other on-demand content
Training Lifecycle Automation

One of the essential features of a learning management system is automation. How much work will the LMS do for you? You will need a host of automation tools covering everything from schedule creation to communications and reporting.

Scheduling Automation
- Share course information across delivery methods
- Easy class creation
- Ability to set recurring schedules
- Automated cancellation policy
- Automated schedule capacity management
- Automated waitlist management
- Instructor scheduling
- Equipment scheduling
- Facility scheduling
- Shared seat management
- Vendor cost tracking
- Business units
- Revenue centers

Registration Automation
- Registration question support
- 24/7 self and admin student registration
- Shopping cart – multiple course checkout
- Bulk registration by students and admin
- Pre-requisite requirement (recommended, enforced)
- Pre-requisite criteria (attended, passed, etc.)
- Revenue distribution

Communications
- Customizable macro-driven communications
- Customizable email look and feel
- Automated acknowledgements, confirmations and reminders
- Automated pre- and post-class surveys
- Automated instructor evaluations
- Automated internal notifications (instructor assignment, new registrations, evaluations, etc.)
- Automated class full and class cancellation notifications
- Calendar sync for schedules for instructors and students
Pricing and Payments

To run your training programs “as a business” you need some very powerful features to help make that business profitable. In-addition to adding pricing to your course offerings you will need:

- A best-in-class e-commerce solution integrated with the top payment processing vendors
- Global account based and/or targeted course-specific discounting
- Multiple pricing scenarios including early bird discounts, multiple currency support and multiple price items

Whether you call it training credits, vouchers, learning units or something else, if you presell training, you need a system to manage those accounts and transactions. An external LMS will give you the tools to pre-sell training as “training units” or by using a set amount of monetary funds to represent a cash balance such as an open purchase order.

Payment Management and e-Commerce

- Online e-commerce with credit cards
- Shopping cart
- Purchase order payment
- Prepaid training credit payment
- Split payment between multiple payment methods
- Global tax calculations
- e-Commerce for multiple currencies
- Discounts by payment method

Discounts and Uplifts

- Multiple discounting methods (early bird, group, delivery method and levels of partnership)
- Tiered discounting
- Limitations on discounts (1-time use, by number, date range, etc.)
- Automatic entry into discount groups
- Discounts by payment method and student type (customer vs. employee)
- Individual course and bundle pricing
- Subscription pricing
- Promotion codes

Pre-paid Training Management

- Tracking in credits or monetary funds
- Assignment of credit values to courses
- Credit/monetary fund usage tracking
- Credit/monetary fund expiration management
- Restrict credits by multiple options such as geographic location, date range, class type, etc.
- Multiple automated communications to customer contact

Pricing Management

- Multiple prices for the same course (customer, partner, employee, reseller, etc.)
- Automatic price selection based on student criteria
- Course and schedule specific pricing
- Pricing in different currencies
- Pricing valid for specific date ranges (early bird)
- Group pricing vs. individual pricing
- Bundle pricing
- Session based pricing

e-Commerce Integrations

- Secure global epayment solutions
- Online fraud management
- Fully customizable
- Shopping cart integration
- Online multi-currency card processing
- International payment and transaction processing
- Alternative payment methods including: Online bank transfers, checks, direct debits, invoices, mobile carrier billings, offline cash, telephone and Crypto-currencies
- Support services for tax and VAT transactions
Revenue and Reporting

Let’s face it, most training organizations are about revenue – your LMS should track and report your revenue recognition using the rules provided by your finance team. You should be able to plug them in and receive a scheduled report without manual calculation.

There are multiple ways to access your data including:

- Preformatted, on-demand criteria based reports
- Configurable on-demand and scheduled data exports
- Delimited imports
- XML based APIs for passing data to us

Revenue Recognition

- Rules for different delivery methods, locations, etc.
- Revenue allocation for bundles
- Amortization
- Automated rule based processing
- Revenue centers

Expense Tracking

- Schedule-based expense tracking
- 3rd party vendor cost tracking for locations and personnel
- Purchase order and invoice tracking for expenses and vendors

Data and Reporting

- Web-based reporting interface
- Standard training KPI reports
- Custom reporting capabilities
- Multiple report formats (HTML, XLS, Crystal)
- Ability to export report data
- Ability to schedule exports
- Convert to single currency for multi-currency data
- Education metrics reporting
- Configurable import/export reusable templates
- Vendor cost tracking
- Site statistic support

Course Packaging

Learners want options. Just as we have seen the rise of blended training we have seen an increase in the need for course packing options such as:

- Learning tracks
- Certification tracking and automation
- Course bundling
- All you can learn, blended learning subscriptions

Tracks and Certifications

- Learning tracks support based on standard categories (ie. role, product, topic etc.)
- Fully customizable learning tracks on custom categories
- Certifications support
- Automatic certification based on attendance, pass etc.
- Automatic certification creation and mailing
- Automatic certification expiration reminders
- Automatic decertification on expiry
- Certificate equivalency support – multiple paths to certification
- Discounting privileges upon certification
- Admin override of certification and decertification
- Dynamically built certificates as PDF attachments

Course Bundles

- Course bundles and bundled pricing
- Predefined bundles
- Course to/from bundle reference links

Subscriptions

- All access pass
- Category-specific subscriptions
- Delivery method specific subscriptions
- All access pass
- Customized subscription duration (6 months, 1 year, etc.)
- Automatic expiration management and reminders
- Customizable student number (individual, group, unlimited enterprise)
Student Experience

The learners experience is vital to any educational portal. Your training site should be branded with your corporate look and feel, and be visually integrated into your corporate website. LMS branding options should include corporate:

- Navigation
- Style sheets
- Colors scheme
- Graphics

Ease-of-Use / Look and Feel

- Customizable look and feel (branding) by group and/or country
- Student views in multiple languages
- Catalog search and browsing
- Calendar search and browsing
- Search for courses using multiple criteria (location, instructor, delivery type, date range, etc.)
- Customizable labels (for tracks, training credits, etc.)
- Direct links to search results (e.g. all courses in a specific location)
- Built-in HTML editor

Grouping

- Limit available courses by groups
- Offer group specific pricing
- Automatically enter students into groups (by company, by code, by certification)
- Manual entry of students into groups
- Organizations or Accounts

Profile Management

- Single sign-on with XML or SAML
- Self-service update of personal information
- Adding/updating profiles via an API
- Ability to view training history

Implementation and Support

Implementation services, education and on-going support are needed to help you get the most from your learning management system.

Implementation

- Assigned implementation specialist
- Detailed implementation plan
- Implementation specialist at your location (travel not included)
- Comprehensive training plan customized to your implementation

Hosting and Support

- Service level agreements
- Live technical support, customer service and consulting

Conclusion

ViewCentral has been helping organizations deliver extended enterprise training since 1999. We understand the external resource, revenue and training expense management needs. For more information or assistance with your journey to find the right LMS, send us an email at sales@viewcentral.com, visit our website www.viewcentral.com or give us a call at 888.322.5169 – we are happy to help out.
About ViewCentral

The ViewCentral cloud-based learning management system (LMS) has been helping businesses deliver extended enterprise training since 1999. By understanding the resource, revenue and expense management needs of an external training business, the ViewCentral LMS automates business processes, minimizes administrative tasks, helps grow profits and streamlines the education of customers, partners and resellers. ViewCentral enables your training organization to become a vital contributor to corporate revenue goals.

For more information email sales@viewcentral.com, visit www.viewcentral.com or call us at 888.322.5169