LMS Checklist

How to Find the Best LMS for Your Retail Company
Introduction

More than ever, it's imperative that your training tools are built for the unique challenges facing retailers today. We'll take you step-by-step and guide you through the questions you should ask vendors while selecting the right solution to fit your needs.

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Step One: What are your company’s big picture goals?

You might categorize yourself as “retail,” but are you a high-end retailer? Do you sell chainsaws or baseball caps? Are you a direct-to-consumer brand? Do you have a mix of online retail and brick-and-mortar stores?

Step One: What are your company’s big picture goals?

Here are a couple of examples:

We are an online-first retailer of high-end luggage. We have five retail locations in high-traffic areas.

We are a keystone department store that caters to middle-income clothing and homewares shoppers. We have 350 brick-and-mortar locations and online sales make up approximately 13% of our overall sales.

Your company:

We’re ________________________________.

Now, let’s talk about your big picture goals. Specifically, let’s name two of them. Use these examples to help get the wheels turning:

We are an online-first retailer of high-end luggage. We have five retail locations in high-traffic areas. Our goal is to open 15 more brick-and-mortar locations and increase our revenue by 200% over the next two years.

We are a keystone department store that caters to middle-income clothing and homewares shoppers. We have 350 brick-and-mortar locations and online sales make up approximately 13% of our overall sales. Our goal is to aggressively scale our online offerings to 20% of our total revenue by the end of next year.

Jot them down here. It’ll help clarify your thought process.

We’re ________________________________, and our goal is to ________________________________, and our goal is to ________________________________.

Now let’s build on this to further define your learning goals and help you pick the best LMS for your company.
Step Two: How will you use your LMS?

Finding the right LMS for you is all about finding the one with strengths that match your training goals. So, let’s start thinking about those goals. Work through this list of training goals and check all that apply to your L&D strategy.

I want to…

☐ train a workforce  ☐ improve customer service  ☐ create transparency
☐ reduce turnover  ☐ drive culture  ☐ build an online academy
☐ track compliance  ☐ build community  ☐ increase safety
☐ grow leaders from within  ☐ increase sales  other __________________________

Think generally about how you can use these training activities to achieve your L&D goals. Now that you have a couple goals in mind, think in broad strokes about how to achieve them.

Let’s go back to our example:

We are an online-first retailer of high-end luggage. We have five retail locations in high-traffic areas. Our goal is to open 15 more brick-and-mortar locations and increase our revenue by 200% over the next two years. Being able to streamline onboarding and new store openings will help us achieve our goals.

We are a keystone department store that caters to middle-income clothing and homewares shoppers. We have 350 brick-and-mortar locations and online sales make up approximately 13% of our overall sales. Our goal is to aggressively scale our online offerings to be 20% of our total revenue by the end of next year. Providing exceptional training for our online customer service department will help us achieve our goals.

Now let’s define your learning goals:

We’re a __________________________ and our goal is to __________________________ will help us accomplish our goal.

1. DEFINE YOUR COMPANY
2. YOUR GOAL
3. TRAINING ACTIVITIES
Step Three: Drill down into features & functionality

Alright, finally made it to the fun part. Most LMS companies have a lot of the same basic features and functionality—like a library, quizzes, testing, and reporting.

But what we’re trying to do is find the best LMS for your company, so let’s get into the nitty gritty of these features and functionalities and what they actually mean and how they can be used to implement your L&D strategy.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Functionality</th>
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<tbody>
<tr>
<td>Cloud-based (or SaaS, web-based)</td>
<td>This lets your learners access the LMS through the internet wherever and whenever they need it.</td>
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<tr>
<td>Installed</td>
<td>This means the LMS is installed locally on devices, which can provide an extra layer of security, but makes system updates and new content rollouts more challenging.</td>
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<tr>
<td>Mobile (app, responsive design)</td>
<td>An LMS with mobile responsive design is device agnostic -- you can access it from any laptop, tablet, or smartphone without losing any usability.</td>
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<tr>
<td>Library</td>
<td>Organizes content so it's easily searchable. Learners need relevant content readily available. The easier it is to find, the more likely they are to use it.</td>
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<tr>
<td>Quizzes/tests/assessments</td>
<td>What kind of skills do you need to test learners on? What type of assessments get to that goal? Do you need an LMS that can handle in-person assessments?</td>
</tr>
<tr>
<td>Built-in course authoring</td>
<td>Company-specific content drives engagement.</td>
</tr>
<tr>
<td>AICC/SCORM compliant</td>
<td>Compliance material often comes in these standard LMS formats</td>
</tr>
<tr>
<td><strong>Feature</strong></td>
<td><strong>Functionality</strong></td>
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<td>-----------------------------------------</td>
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<tr>
<td>□ Custom branding or skinning</td>
<td>Learners are quick to adopt systems that look and feel like your company.</td>
</tr>
<tr>
<td>□ Automated reporting</td>
<td>The ability to schedule and send reports is important for streamlining system management.</td>
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<tr>
<td>□ Social learning</td>
<td>One of the most effective ways to engage with learners. It helps drive knowledge retention and lends the LMS a familiar, intuitive feel.</td>
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<tr>
<td>□ Integrate with third-party systems</td>
<td>I need my HRIS and other applications to work seamlessly with my LMS.</td>
</tr>
<tr>
<td>□ Community building and user interaction</td>
<td>Engagement is super important and giving learners a line of communication with each other is one of the simplest ways to empower them within the LMS.</td>
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<tr>
<td>□ User profiles</td>
<td>Profiles give learners a sense of empowerment in the system, which drives engagement. Profiles also give administrators the ability to assign content to specific groups and pull specific reports.</td>
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<tr>
<td>□ Collaboration</td>
<td>I want my learners to work together and collaborate so important institutional knowledge doesn’t end up siloed in one department or another.</td>
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<tr>
<td>□ Awards &amp; badging</td>
<td>Awards and badging helps drive engagement and knowledge retention by giving learners a bit of motivation.</td>
</tr>
<tr>
<td>Feature</td>
<td>Functionality</td>
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<tr>
<td>Gamification</td>
<td>Recognize that professional development is sometimes pretty dry. Gamification is a way -- typically through points, awards, or badges -- for you to spice it up a little. It helps drive engagement and knowledge retention.</td>
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<tr>
<td>Live video conferencing</td>
<td>I need to showcase live/online events.</td>
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<tr>
<td>Blended learning</td>
<td>One of the most effective ways to engage learners and get them to pay attention throughout the entire course.</td>
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<tr>
<td>System ROI</td>
<td>I need analytics I can point to that show the effectiveness of my LMS.</td>
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<tr>
<td>Classroom management</td>
<td>I’d love to manage my in-person trainings online.</td>
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<tr>
<td>Certification management</td>
<td>Great for checking compliance.</td>
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<tr>
<td>eCommerce</td>
<td>I need to sell course material in the LMS.</td>
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<tr>
<td>Gradebook</td>
<td>My instructors need to capture grades in the LMS.</td>
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<tr>
<td>Multilingual</td>
<td>My LMS needs to support multiple languages.</td>
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Step Four: How will you measure success?

So, how will you measure the success of your training activities?

This major question often goes unaddressed. Success is more than just getting an LMS up and running. It’s the measurable, specific ways you benchmark the effectiveness of your L&D strategy and its impact on your company.

Let’s use Step 1’s big picture ideas to help with this. Some examples:

Successfully streamlining our onboarding and new store openings means we’ll be able to reduce the time to productivity of our new retail associates from four weeks to three weeks, saving $1,200/employee based on manager time and time-off-floor for the new associate.

Successfully providing exceptional training for our online customer service department means we’ll be able to increase our NPS and CSAT by 30% by the end of next year.

So how will you measure success?

Successfully ____________________________________________

means __________________________________________________.
Step Five: Get to know the company who makes the software.

The next step is to start comparing LMS companies. Luckily, there’s plenty of websites that compare features and functions of different software. We suggest doing some research with these sites:

- Capterra
- LMS.org
- Software Advice
- GetApp
- Training Industry
- Featured Customers

When choosing a software company for your LMS, it's important to get to know that company. When were they founded? Are they independent or corporate? Where are they located? Do they offshore their support?

Basic questions about the company might help you. Is it important that they’re private? Do they have a support model you want? What kind of training packages do they offer? What do their reviews say? Once you’ve done that write down your top three companies in any order.

1. ____________________________
2. ____________________________
3. ____________________________

Congrats!

You just did a huge thing! You’ve done a ton of prep work and now you’re on your way to choosing a new LMS.

Let us know if we can be of any more help, but for now, congratulations on taking your first step to reaching your learning and development goals.
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