

Learning Management Systems

LMS

Features Checklist

The following list provides a starting point for organizations undertaking a Learning Management System (LMS) request for proposal (RFP) or request for information (RFI), or those wishing to compare their current LMS with the most commonly available features in the market today. It is intended to provide support for your evaluation process and does not represent an exhaustive list of all existing/desired LMS features.

General Vendor Characteristics

- 24x7 help desk support for administrators and participants through multiple mechanisms (email, phone, live chat, chatbot, etc.)
- Knowledge base with content appropriate for both administrators and participants
- Documented disaster recovery process
- Documented long-standing performance and financial record (uptime, financial stability, etc.)
- Evidence of vendor long-term viability, including consideration of acquisition possibilities
- Clear process for feature enhancement requests, known roadmap
- Proof of scalability as customer organizations grow
- Proof of cloud service performance
- Clear initial and ongoing platform configuration process
- Details on cloud services housing the system (Amazon Web Services, Microsoft Azure, Google, IBM, etc.)
- Record of data security (to include data breaches) related to customer data
- Details on server locations (e.g., countries) and certifications (e.g., ISO)
- Certified in E.U.-U.S. Privacy Shield, General Data Protection Regulation (GDPR), etc.
- Strong net promoter score, Glassdoor reviews, customer testimonials, etc.
- Strong reputation in areas most important to your organization (value vs. price, ease of implementation, customer support pre- and post-implementation, knowledge of your industry, etc.)
- List of customers in your industry, and published case studies for your industry or otherwise relevant



User Interface Features

- Versions appropriate for all devices (computer browser, tablet browser, mobile browser, iPhone/Android apps)
- Customizable to the degree needed for your organization (e.g., logos, colors, branding themes, etc.)
- Dashboards for each role (participants, trainers/facilitators, managers, administrators, others)
- Strong learner-experience focus (e.g., easy content discovery, content recommendations, pathing, curation, etc.)
- Artificial intelligence (AI)-enabled chatbot interface for general Q&A support and learning recommendation
- If desired interface is lacking, proven experience with integrating a third-party Learning Experience Platform (LXP)
- Confirmation of languages supported

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User Profiles

- Basic fields plus administrator-configurable custom fields
- Different fields for participants vs. trainers vs. other roles
- Ease of updating to encourage participant use
- Certificate and badge display capabilities
- Learner history (can be hidden from other participants)
- Personalized and adaptive learning plans based on job roles, competencies, etc.
- Private learning journal
- Support for non-employee users (contractors, gig-workers, etc.)

User Communications

- Strong email capabilities (customizable per cohort/program type, ability to send on behalf of others, support for attachments, email templates, editor for designed emails, etc.)
- Flexible reminder scheduling
- Message center
- Alerts
- Configurable news items on dashboard
- SMS Text
- Automated emails per program, based on templates so customizable per cohort



Social Learning Features

- Discussion forums (at multiple levels, e.g., per cohort, per program graduates over time, per job role, global, etc.)
- Profile wall (such as Facebook)
- Blog feature with configurable commenting
- Content curation support for users, expert designation, etc.
- User ratings and comments for content, with display of most popular, most highly rated, most recent, etc.
- For forums, profile walls, blog comments, etc. – moderation capabilities for administrators
- For various content types, including participant additions, ability to “like” or similar
- The ability to “follow” other users (trainers, peers, etc.)
- Integration with external social/collaboration platforms (e.g., Slack, Teams, etc.)

Media/Content

- Video/audio/PDF/image/etc. upload (by participants, administrators, trainers, etc.) includes comment support
- Standard support for instructor-led training (ILT) participant materials (Word, PDF, or Fillable PDF)
- Self-paced eLearning course support (SCORM, AICC, xAPI)
- Microlearning content support (scheduled new or for reinforcement, searchable, browsable, etc.)
- Performance support/just-in-time (JIT)/learning in the flow of work
- Self-paced content authoring tool and its flexibility e.g., portable content object production, limited to LMS or not, etc.)
- Strong search capabilities, based on keywords, delivery format, title, and other elements
- Deep linking to content and specific pages outside the LMS
- Program/content recommendation engine (AI-enhanced, adaptive)
- Support for personalized learning (tailored content based on interests, experience, preferred learning methods, learning pace, job role, etc.)

Gamification

- Points/Leaderboards (assess ability to configure)
- Customizable badging
- Mini-game templates
- Customizable learning journeys/curricula



E-Commerce

- Coupon/Promo Codes
- Discounting flexibility
- Monthly recurring credit card capability
- Core currency support
- Manage unlimited tax rules including global value-added tax (VAT)
- Product bundle support
- Ability to browse catalog without logging in
- Reviews and ratings
- Content recommendations
- Varied payment types (e.g., credit card, PayPal, etc.)
- Send invoice option
- Add to cart, checkout and integration with payment gateways for credit card authorization
- Emailed receipts, notifications
- Fiscal reporting, sales analysis, reconciliation reporting
- Subscription model support (e.g., user self-enrollment, user cancellation / transfer, etc.)

Q&A-style Features

- Assessments (both stand alone and associated with programs, with support for pre- and post-result comparisons)
- Surveys/form-builder
- Quizzes (authoring, automated sending, etc.)
- Polls (authoring, automated sending, etc.)
- Support of numerous question types for each of the above

Program Support

- Program/session distinction observed via templates
- Strong visual calendar features
- Support for multi-session programs
- Support for customizable related content per cohort, per program
- Robust ILT support (locations, resources, delivery team conflicts, etc.)
- Easy roster access for all facilitator roles
- Customizable certificates of completion
- Customizable curriculum paths
- Customizable course completion rules
- Competency support (frameworks to enable curriculum planning, learner paths, needs analysis, etc.)
- Wait-listing based on program maximum seats
- Progress meter to track progress in a program or curriculum

Customer Support

- Robust self-serve Knowledge Base with articles and FAQs
- Live chat support
- Vendor support via ticketing system
- Multi-language custom support as needed
- Response time for vendor customer support
- Forum for customer peer-to-peer discussion, community support, etc.



Integration Support

- Restful API for broad integration support
- Single Sign-on (SSO) integrated or connect through third party (e.g., Okta)
- Support and experience integrating with other L&D tools (e.g., Learning Experience Platforms [LXPs], assessment tools, content-creation tools, or others used at the organization)
- Built-in off-the-shelf content from desired partners, or ability to integrate
- Specific experience integrating with organization's HRIS, TM, ATS, or other HR platforms
- Specific experience integrating with Salesforce (or another CRM platform)
- Specific experience integrating with WebEx (or Adobe Connect, Zoom, others)
- Specific experience integrating with organization's collaboration/messaging platform (Slack, Teams, etc.)
- Specific experience integrating with organization's marketing websites (if ecommerce used)
- Specific experience integrating with organization's external content management system (Sharepoint, etc.)
- Learning Record Store (LRS) for xAPI support (e.g., tracking of external learning)

Compliance

- Section 508 compliance
- Audit trail support
- Data security, privacy, and relevant international compliance (varies by organization)
- Automated enrollment rules
- eSignature



Analytics and Reporting

- Robust analytics for users, content, activity, etc.
- Robust library of off-the-shelf reports
- Customizable reporting at multiple levels
- Integration with organization's third-party analytics or reporting tools
- Data portability (credentials, history, etc.)
- Data separation at appropriate levels, but ability to aggregate content for global reports to spot trends, look for market vertical patterns, etc.

Other Administration Features

- Intuitive and flexible back-end administrator user interface (e.g., drag and drop)
- Separate testing/sandbox environment
- Strong level of automation of routine tasks, workflows to move things from one stage to another automatically, use of templates where appropriate, etc.
- Configurable administrator/manager interfaces and dashboards
- Batch import for learners, learner history data, and content
- Multiple administration levels with varying control capabilities (administrators, managers, instructors, etc.)