

Effective Requirements

A good learning management system (LMS) produces a practical environment in which learners can find the content they need, managers can develop their team to improve performance and the learning staff can evaluate training effectiveness. What good is the LMS if it does not meet the needs of all these people? One of the key factors in finding the right LMS is matching it to business requirements, not the other way around. For this reason, among others, it becomes essential to document effective business requirements and use-case scenarios that describe exactly what is needed and can be included in a request for proposal (RFP).

The key term to consider here is “business.” Business requirements are not system requirements — system requirements are very specific to how a system functions and, although important, any system ultimately must be useful in reaching business goals or solving business problems.

In this case, the LMS must be useful to the business of training and development and the requirements created from an establishment of business needs. The basis for defining these requirements likely would be coming from a learning strategy.

The learning strategy defines the objectives of the business and the learning organization’s alignment to those objectives. At the heart of the learning strategy is defining how the learning organization would achieve the objectives — in other words, the actions that need to be taken and the processes that need to be executed to accomplish the objectives.

Effective business requirements for an LMS are driven by a clearly articulated learning strategy that defines the processes the LMS can help manage. Defining requirements based on how the business manages learning provides a foundation for creating use-case scenarios that LMS vendors can use to show that their product will meet specific business needs.

The Learning Strategy

A learning strategy describes the goals, processes and job roles of the business. The goals define the top priorities on which the business is focused. These goals will change as market conditions and other business factors drive them. Each organization within the business might have its own specific goals that are aligned to overall business goals. Processes are the sets of repeatable tasks executed to support the business in reaching its goals. The accumulation of the processes could represent the business model under which each organization functions. Job roles define the responsibilities and the daily functions that need to be done to execute specific components of the processes.

The focal point of the learning strategy is to describe the approach taken to educate, train and develop the people who occupy the job roles that execute the processes to attain the business goals. People are the foundation of the business, and an LMS can be useful in managing the complexity of improving performance in individuals to attain business goals.

The focal point of the learning strategy is to describe the approach taken to educate, train and develop the people who occupy the job roles that execute the processes to attain the business goals. People are the foundation of the business, and an LMS can be useful in managing the complexity of improving performance in individuals to attain business goals.

Defining the Requirements

A learning strategy likely will categorize the processes and tasks in several categories. The following is a sample, although by no means exhaustive, list of categories that might originate from a learning strategy:

Business for the LMS

Pat Alvarado



in practice:

Quiznos University: Gaming Through an LMS

Quiznos University is a brick-and-mortar institution in Denver, but its learning solutions reach far beyond the facility's doors. With a three-tiered training process, Quiznos teaches new franchise owners and store managers everything from finances to customer service. To make this process as convenient and efficient as possible, Quiznos students start their training at their own pace with QU Online.

Quiznos' LMS, launched in January 2006, houses 44 lessons in nine different subject areas, as well as an innovative learning game called Sub Commander. Christine Fleming, Ph.D., Quiznos University chancellor, said the introduction of the LMS has streamlined the training process and helped learners prepare for the later stages of the educational process.

"Our franchise owners, our team members, everybody has to memorize these complicated recipes for three different sizes of 30 sandwiches — it's pretty massive," Fleming explained. "And what we found, before we launched our LMS, was that if they didn't have a really good grasp of that information walking in the door for their in-store experience, they would basically spend a lot of time just learning that stuff and would not have enough exposure to all the other tasks."

The training game, Sub Commander, has helped students memorize these complicated recipes. In this Navy-themed game, users move up the ranks from sub crew to sub commander as they learn how to build each size of all 30 subs.

Fleming said Sub Commander has been an effective training tool because it works more like a traditional video game than most learning games.

"People don't sit and study before playing a video game," she said. "So, in applying that to the idea of building sandwiches, we came up with Sub Commander. You don't go off and learn first and then come in and take Sub Commander as a test. You learn by playing the game."

Quiznos University's online courses also employ a spiral learning technique that helps students retain information about all nine subject areas.

Instead of focusing on one subject at a time, the lessons spiral among topics, ensuring learners stay fresh and continue to build on each skill area. Fleming said this learning style is especially useful in the restaurant industry, where managers and owners have to be able to work on many tasks at once.

"You can't say to a customer, 'Excuse me, I'm working on my financial reports right now. I'll be able to make your sandwich in 30 minutes,'" Fleming said. "You have to deal with all of these issues simultaneously."

She also said the students using the LMS have demonstrated much higher skill levels in the later stages of training than students who participated in the university's previous introductory program, "Training-in-a-Box."

Regional managers report that trainees now walk in the door with a broader knowledge base, ready to develop more complicated skills.

Fleming said she also sees this progress at the highest level, when students come to complete their training at Quiznos University.

"A couple of years ago, we were happy for our learners to be able to do some financial calculations," Fleming said. "Today, we aim much higher — we try to get them to application and to analysis. So, we feel like we're giving them a much more solid background to be successful in their stores."

— Tegan Jones, tjones@clomedia.com

FIGURE 1: TYPES OF LEARNERS

Priority	Description
High	This requirement must be met within the initial deployment of the LMS.
Medium	This requirement must be met within the second and subsequent deployment phases of the LMS.
Low	This requirement can be met within the final deployment phase or not met at all.

- Skill assessment
- Content access
- Enrollment and tracking
- Learning evaluation
- Marketing and communications
- Content development

Each requirement would fall into one of the defined categories. By focusing on a specific function defined by the learning strategy, it becomes easier to organize key requirements.

As the requirements are documented, it is important to assign a number and apply a priority to each requirement based on its importance. This helps keep consistent communications regarding requirements, and it provides perspective in determining vendors that meet all the highest priority requirements. Consider the rating system for defining priorities (see Figure 1).

Each business requirement should be written to describe who, why, what, when and the result. The definition should describe who is performing the task — the learner, the manager, the learning staff or a combination. It should provide the motivation for doing the action such as needing to address a specific skill gap, and it should describe what is being done such as searching for courses that fill the skill gap.

It also should include any time constraints that need to be observed such as whether the training or improvement in performance needs to be met by a specific time frame, as well as describe the expected outcome of performing the action. A use-case scenario is built from the business requirements, and that is why it is so important to describe the business requirements so clearly.

Use-Case Scenarios

A use-case scenario is the most powerful component of the business requirements. It describes a complete set of actions for a specific process that represents the vision of the learning strategy. The description must be simple and straightforward so as to be clearly understood by the executive decision-makers and stakeholders, as well as the vendor. This produces a baseline metric that can be compared and evaluated by everyone involved in selecting the LMS. The power of the use-case scenario is that vendors become accountable for directly demonstrating that their product fulfills the objective of the scenario during the final demo meeting.

The use-case scenario uses the same parameters as the business requirements as far as defining who, why, what, when and the result. The difference is that the scenario combines several business requirements to articulate a complete process. Here's a sample of what a use-case scenario might look like:

Mary is a manager in the loan processing department. She has noticed productivity is not as high as needed to reach an important company goal — processing 50 loans per week per loan processor in her department. Under closer review, she has determined John is below the average proficiency of processing 50 loans per week. Mary and John review

his proficiency level against the competencies defined for a loan processor. Both agree John is not at the median level of proficiency in several areas of loan processing. Mary asks John to come up with a learning plan that will address the gaps. John identifies several courses related to his job role that would address his proficiency gaps. John and Mary review the learning plan together and make further revisions before committing to the timeline. John enrolls in each of the classes except for one. The deadline for this course defined by the learning plan is nearing, and John has not yet enrolled in the class. Mary is notified of the issue, and she discusses it with him. John enrolls and completes the course. Each week, Mary reviews John's productivity and notices he has risen to 60 loans per week after completing the learning plan.

This use-case scenario starts off by tying in the corporate objective and how Mary's department is aligned to that objective. This establishes the business need and, therefore, the objective to achieve. This also defines the fact that a performance metric is being used to determine the course of action in regard to a learning plan.

It could be that a requirement has been defined that managers must be able to determine an individual's proficiency to not only identify a need for a learning plan but also the effect of the learning plan after execution. When vendors demonstrate this scenario, they might demonstrate how their LMS connects to external operational systems or data warehouses that provide these metrics or simply admit that they are unable to do so.

The use-case scenarios must represent the vision of the learning strategy, independent of whether it is expected to be managed by the LMS. Although it might be known that no vendor can meet a portion of the scenario, it never should be omitted — it provides an opportunity for vendors to demonstrate how their product will function within the vision of the learning strategy.

Use-case scenarios also describe all the people whom the learning management process affects. This sample scenario likely will have a counterpart that describes the learning staff defining proficiency levels and core competencies, as well as matching specific courses or perhaps learning objects that address them.

Ultimately, the use-case scenario is simply describing the learning management process and not the learning management system. It does not try to define nor even mention using a system to manage learning. It is important to note that when technology is considered in a business environment, its purpose must be to support the people, job roles and processes of the business rather than to replace them.

There should be a minimum of three use-case scenarios and probably no more than five in an RFP for an LMS. This keeps the use-case scenarios manageable when it comes time for the vendor to demonstrate them. There should be enough, however, to represent all the people who are involved.

Putting It All Together

Once the business requirements and use-case scenarios are completed, they should be compiled into the RFP, so vendors have an opportunity to understand how learning is managed and how their product can support the process. A clearly defined learning strategy is a big help in developing the business requirements, as it defines how learning is to be managed, and it characterizes specific components the LMS can support. It also avoids the common pitfalls of defining system requirements rather than the learning management process and makes it easier to use.

Eventually, it comes down to this: Effective business requirements for the LMS are simply clear descriptions of how learning is managed. The most effective business requirements will come from a learning strategy that is aligned to the business. After all, companies are composed of people. Each person is expected to perform a specific job role, and that job role is part of a specific business process, and that process is designed to meet business goals. ■

Pat Alvarado is the learning and technology professional at E-Learning Engineering. She can be reached at editor@clomedia.com.



Do your people have the business skills to make the right moves...

...or are they just pawns in a game they don't understand?



2-3 day business training courses combining customized computer simulations with classroom discussions:

- Strategic Thinking ▲
- Financial Literacy ▲
- Business Acumen ▲
- Leadership ▲
- Teamwork ▲

What's your next move...?

Call 847-573-8981 Ext. 203

www.PRISM.com