

Scoping Your Learning Management System

Use the outline below to capture your baseline constraints and must-have features. Don't aim for perfection. You can refine this as you learn more through demos and conversations with prospective partners.

BASELINE CONSTRAINTS

What boundaries do you need to work within as you search for a solution?



BUDGET

IMPLEMENTATION (YEAR ONE)

ONGOING ANNUAL (YEAR 2+)



TIMELINE

SOFT LAUNCH FOR TESTING

FULL "GO LIVE" DATE



POLICIES

ORGANIZATION POLICIES

Examples: procurement, vendor set-up, accessibility, security & access rules, data privacy



USERS

ANTICIPATED NUMBER OF USERS

Learners (internal)	Learners (external)	Admins	Instructors/facilitators	Managers/supervisors

Notes about expected growth in the user base over 12-24 months

MUST HAVE FEATURES

What are your non-negotiables vs. nice-to-haves as you search for a solution?

LEARNING EXPERIENCE DELIVERY

FEATURE	MUST HAVE	NICE TO HAVE
Self-Paced Courses/Modules (e.g., videos, SCORM, etc.)		
Webinars		
Online Facilitated Class/Cohort		
Hybrid Facilitated Class/Cohort		
On-Demand Learning Library		
Learning Assessments		
Learning Dashboards/Progress Views		
Other:		

CERTIFICATION, CEU, AND CREDENTIAL MANAGEMENT

FEATURE	MUST HAVE	NICE TO HAVE
CEU Credit Tracking		
Certification/Certificate Renewal Tracking		
Badging/Micro-Credentials		
Other:		

ADMINISTRATION & REPORTING

FEATURE	MUST HAVE	NICE TO HAVE
Basic Admin Structure (all admins with same permissions)		
Multi-level Admin Structure (permissions differ by level)		
Basic Reporting (completions, user logins, etc.)		
Advanced Reporting (build custom reports in system)		
Data Visualization Dashboards		
Account Creation & Enrollment by Admin/Supervisors		
Account Creation & Enrollment via Self-Registration		
Course Authoring Tools in LMS		
Other:		

NEED HELP IDENTIFYING THE RIGHT LMS FEATURES?

Many organizations start with a long list of “nice-to-haves” but aren’t sure which capabilities truly matter. Our team specializes in helping organizations define requirements, prioritize features, and select technology that supports real learning outcomes.

Schedule a discovery call and we'll walk through your goals together.

INTEGRATIONS

FEATURE	MUST HAVE	NICE TO HAVE
Identity & Access Management (SSO with email provider)		
HR Information System		
Customer Relationship Management System		
Webinar Management Service		
Website (e.g., WordPress)		
Marketing & Communication Tools		
Other:		

HELP & SUPPORT

FEATURE	MUST HAVE	NICE TO HAVE
Technical Support for Site Admins		
Direct Technical Support for All Users		
Onboarding Training for Admins		
Knowledgebase/Support Community		
Staff Augmentation (e.g., outsourcing admin role)		
Other:		

BRANDING

FEATURE	MUST HAVE	NICE TO HAVE
Basic Brand Alignment (e.g., logo and colors)		
White label Branding (e.g., fully customized to your brand)		
Multiple Audiences; Different Branding for Each		
Other:		

SPECIALIZED & EMERGING

FEATURE	MUST HAVE	NICE TO HAVE
Ready-to-use Content Library		
Coaching/Mentorship Tools		
AI-enabled (course creation, learning recommendations)		
Other:		

NEED A SECOND OPINION ON YOUR LMS FEATURE LIST?

Selecting the right platform can be challenging without seeing how features support real learning experiences. Our team helps organizations translate goals into clear LMS requirements

Schedule a discovery call and we'll walk through your priorities together.