

Sample RFP for Learning Management System

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1. Objectives

Top-performing organizations recognize that people are their most important asset. They are implementing people management solutions in order to drive higher productivity, retain their best performers, mobilize their workforces in support of the most important strategic goals, and improve their ability to respond to rapidly changing environments. Learning management is an important function within people management; it enables an organization to take a strategic approach to building the skills needed for successful operations and to connect people to expertise.

This RFP template provides requirements for implementing a global learning management solution for formal and informal learning such as collaboration, social networking, etc.

2. Company Profile

Please provide a brief description of your company's history.

How many offices do you have worldwide? Please provide information on each office, including location and services provided.

What distinguishes your company and its offerings from others available in the market?

Please provide an overview of the products your company offers. Please indicate if any of the products offered in your solution are provided to you from a third party (i.e., are non-native to your core product code) and briefly describe the level of integration between your core technology and third-party add-ons.

Please describe your experience implementing enterprise learning solutions globally.

Provide a brief description of your company's financial and overall stability. Include most recent audited annual report.

Please describe your company's vision for the future. What are you currently doing to achieve that vision?

Provide a brief description of the analyst ratings or feedback your solution has received.

Has your company assumed a thought leadership role in the learning market? Does your management team participate in industry forums?

What partnerships do you have with technology vendors?

What partnerships do you have with e-learning content providers?

What makes your system superior to others in terms of its technology platform (open standards-based, system architecture, scalability, security model, data models)?

What deployment options do you offer?

Do you offer strategic services (such as change management, job role modeling, competency model definition, governance or process modeling) to help ensure my new processes and solution are successful?

3. LMS Functional Requirements

Please use the following legend to indicate compliance with the requirement:

- 1 = Out-of-the-box
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- 3 = Customization required
- 4 = Partner
- 5 = Future release
- 6 = Not available

Number	LMS Requirement	Compliance	Vendor Response
3.1. General			
1.	Describe your ability to integrate with industry-standard email and scheduling applications.		
2.	Is the system modular, allowing deployment of only the required functionality for phase one?		
3.	Can the system provide a different look and feel for each department where it is deployed?		
4.	Does the system support different business rules for each department?		
5.	Can both students and administrators access the system through a Web browser?		
6.	Does the system support multiple time zones?		
7.	Does the system support the use of single sign-on?		
8.	Does the system provide online help?		

Number	LMS Requirement	Compliance	Vendor Response
3.2. User Access			
1.	Does the system allow users to process self-registration?		
2.	Can users use self-service to retrieve a lost password?		
3.	Does the system provide a personalized learning plan?		
4.	How does the system make it easy for users to register for learning that's already assigned to them?		
5.	Does the system include an intuitive search experience?		
6.	Is the search function a full-text search engine, or does it only search course titles and keywords?		
7.	Do users have multiple ways to find knowledge they need?		
8.	Does the system provide the user with access to his/her own training transcript?		
9.	Can the user add training to his/her own transcript (e.g., for outside education completed)?		

10.	Does the system provide the ability for users to add “ad hoc” training events through self-service and have them approved by their manager?		
11.	Can users submit requests for learning that isn’t available in the catalog?		
12.	Explain how the user interface can be modified.		
13.	Are there any limitations on the number of custom or unique fields?		

Number	LMS Requirement	Compliance	Vendor Response
3.3. Classroom and Curriculum Management			
1.	Describe how a curriculum is developed and managed within the system.		
2.	Can administrators add, update, reschedule, and remove courses quickly without requiring support from the IT organization?		
3.	Does the system provide access to and track completion/test results for all courses: classroom, online, instructor-led, and e-learning?		

Number	LMS Requirement	Compliance	Vendor Response
3.3. Classroom and Curriculum Management			
4.	Can an administrator schedule a room for classroom events?		
5.	Can an administrator verify the availability of equipment and facility for training?		
6.	Does the system allow administrators to manage waitlists?		
7.	Does the system support the ability to define prerequisites and restrict access to courses until the prerequisites are met?		
8.	Does the system support the ability to override cut-off dates, prerequisites, waiting lists, and class location?		
9.	Does the system support the ability to require manager and/or administrator approval for course registration?		
10.	Do managers have simple processes for approving their team members' learning activities?		
11.	Does the system support a two-level online registration approval process?		
12.	Can the system support approval for learning that is taken externally rather than through the learning catalog? For		

Number	LMS Requirement	Compliance	Vendor Response
3.3. Classroom and Curriculum Management			
	example, U.S. government employees must obtain approval via a standard form, SF-182, prior to enrolling in external training programs.		
13.	Can the system restrict access to courses based on specific criteria (e.g., restrict by job function, location)?		
14.	Can administrators create curricula with modularized components and exams?		
15.	Does the system support the ability to automatically assign learning (courses, curricula, or certifications) to individuals or groups or enroll them in courses?		
16.	Does the system maintain users' training history regardless of changes in job function or location?		
17.	Does the system support the ability to enroll and un-enroll individual or groups manually?		
18.	What happens to enrollments if a class is cancelled?		
19.	Can the system assign due dates for course completion?		

Number	LMS Requirement	Compliance	Vendor Response
3.3. Classroom and Curriculum Management			
20.	Can the system attach files to notifications (i.e., information to be studied before taking the course)?		
21.	How does the system handle new versions of an existing course?		
22.	Does the system support relaunching of a completed learning activity?		
23.	How does the system track multiple “tries” at a learning event?		
24.	Does the system provide the capability to store trainer support information (i.e., facilitator guides, instructions, etc.) within the LMS?		

Number	LMS Requirement	Compliance	Vendor Response
3.4. Blended Learning			
1.	How does the system support blended learning activities? For example, can the system mix a series of components in different delivery formats (e.g., pre-test, instructor-led course, on-the-job assignment) and roll them up into a single course?		
2.	Is there sequencing in blended learning activities, for example, to ensure that a pre-test is taken before the course?		
3.	Does the system provide the capability to store scanned forms, MS Word documents, PowerPoint, PDFs, etc. within the LMS at the course level?		
4.	How can the system support coordinated, cohort-based learning programs, where everyone goes through the same series of learning events?		

Number	LMS Requirement	Compliance	Vendor Response
3.5. Resource Management and Inventory Management			
1.	Do calendars reflect resource availability (e.g., taking into consideration current resource bookings and holidays)?		
2.	Does the system support the ability to manage qualified instructors?		
3.	Can the system assign instructors to course offerings?		

Number	LMS Requirement	Compliance	Vendor Response
3.5. Resource Management and Inventory Management			
4.	Can the system associate classrooms with a physical location?		
5.	Does the system support conflict checking when scheduling resources (instructors, rooms, equipment, etc.)?		
6.	Can administrators associate specific types and quantities of inventory to a class?		
7.	Can administrators establish replenishment quantities for inventory?		
8.	Can resources be associated with an hourly cost and calendar?		
9.	Does the system allow administrators to run reports that show utilization rates and costs of resources?		

Number	LMS Requirement	Compliance	Vendor Response
3.6. Course Registration and Notifications			
1.	Does your system restrict registration based on department, job role, profile, training cost?		
2.	Describe how prerequisites are defined and checked for completion before enabling user registrations.		
3.	Does the user automatically receive notifications for confirmations, changes, and cancellations?		

Number	LMS Requirement	Compliance	Vendor Response
3.6. Course Registration and Notifications			
4.	What happens to a user's registration if a new version of the course is deployed?		
5.	What notifications do you support?		
6.	How configurable are the notifications? Can configurations be done by non-technical personnel?		
7.	How do you handle support notifications for users without the ability to receive a direct email?		
8.	Does the system trigger email notifications to the manager when the following events occur: direct report enrolls, direct report drops, direct report enrollment requires approval?		

Number	LMS Requirement	Compliance	Vendor Response
3.7. Course Delivery			
1.	Does your system support bookmarking for self-paced learning?		
2.	Does the system track the individual learning objects a user has accessed or completed?		
3.	Does the system support importing Microsoft Word/PowerPoint source material?		
4.	Does the system support other common file formats (streaming media, graphics, audio, animations, etc.)?		
5.	Can the system automatically issue a certificate upon course completion? Can users print their own certificates?		
6.	Describe the system's ability to deliver "learning objects" (small, interrelated learning blocks).		
7.	Can users manage learning plans and complete learning while they are offline, i.e., disconnected from the Internet?		
8.	Can users complete learning using mobile devices?		
9.	Do users working offline have to have their own dedicated client machines, or can they work on a shared environment such as a kiosk?		
10.	What type of content does the offline player support?		

Number	LMS Requirement	Compliance	Vendor Response
3.7. Course Delivery			
11.	Does content have to be created in a certain tool to be consumable offline?		
12.	What client operating systems does the offline player support?		

Number	LMS Requirement	Compliance	Vendor Response
3.8. Instructor Tools			
1.	Does the system provide tools to help instructors manage their instructor-led or virtual classes?		
2.	Can an administrator perform instructor management tasks if the instructor is unable to do so?		
3.	Can instructors make changes to their class rosters?		
4.	Can instructors assign scores or grades to students?		
5.	Does the system notify instructors when they have work to do?		

Number	LMS Requirement	Compliance	Vendor Response
3.9. Content Standards			
1.	Is the system SCORM certified? If so, which version of SCORM is certified?		
2.	Is the system AICC certified?		

Number	LMS Requirement	Compliance	Vendor Response
3.9. Content Standards			
3.	Does the system support SkillSoft's Open Learning Services Architecture (OLSA)?		
4.	Do you provide any assistance (e.g., a testing lab) to content providers to test compliance with the LMS?		

Number	LMS Requirement	Compliance	Vendor Response
3.10. Course Evaluations and Assessments			
1.	Describe the system's test/assessment capabilities.		
2.	Does the system include an interface for writing and deploying test questions?		
3.	Can the user view detailed results of their test performance?		

Number	LMS Requirement	Compliance	Vendor Response
3.10. Course Evaluations and Assessments			
4.	<p>Does the system support the four fundamental levels of education:</p> <ul style="list-style-type: none"> ▪ Reactions/opinions ▪ Learning improvement relative to objectives ▪ Transfer of skills and knowledge for practical application ▪ ROI or organizational changes that are outcomes of the training program <p>Please describe support for each.</p>		

Number	LMS Requirement	Compliance	Vendor Response
3.10. Course Evaluations and Assessments			
5.	Can online course and instructor evaluations be created and incorporated? Please describe.		
6.	Does the system provide both pre-testing and post-testing capabilities (including reports that compare pre- and post-test performance)?		
7.	Can the system support the following question types: multiple choice, fill-in-the-blank, drag-and-drop, and matching?		
8.	Does the testing system support: randomizing, hints, limiting number of attempts, practice (unscored)?		
9.	Can test questions include graphics, animations, audio, or video?		
10.	Can the system provide branching based on test item performance (i.e., if question is missed, automatically route the user to a specific course location)?		
11.	Can the administrator configure how many times a user can take a test?		
12.	Can the system provide the ability to interface with third-party testing/evaluation tools (e.g., QuestionMark)? Please specify any delivered integrations or partnerships that may exist.		

Number	LMS Requirement	Compliance	Vendor Response
3.11. Virtual Classrooms			
1.	Does the system support virtual classrooms to deliver learning in real time to widely dispersed audiences?		
2.	Is the collaboration feature scalable to support e-meetings and enterprise-wide activities (e.g., 2,000 attendees) without requiring IT support?		
3.	How does the LMS integrate with the virtual classroom technology?		•
4.	Does the system support instant messaging? Can the IM system reside behind the firewall?		

5.	Can users ask questions of instructors in real time?		
6.	Can the system link users to external applications, such as Web sites?		
7.	Can the system include a synchronous shared whiteboard (equivalent to a traditional flipchart or chalkboard)?		
8.	Does the virtual learning environment support testing and assessment?		
9.	Are session recordings available for playback at a later time?		

3.12. Certification Management			
1.	How does the system manage certifications?		
2.	Does the system track certification deadlines? How does it notify users about missed deadlines?		
3.	Can certifications have expiration dates? Can there be separate recertification paths?		
4.	What options are available to establish equivalent courses within certifications?		
5.	Can certifications be "nested"? That is, can one certification contain other certifications?		
6.	Can certifications be granted manually?		

3.12. Certification Management			
7.	Can certifications be versioned?		
8.	Can the system track external certifications?		
9.	Does the system support audit trails and e-signatures?		
10.	Is every data or signature entry recorded in the database with a date and time stamp?		
11.	Does each entry in an electronic record contain the printable name of the operator with time and date stamp and meaning of the signature?		

Number	LMS Requirement	Compliance	Vendor Response
3.13. On-the-Job Training			
1.	How does the system facilitate and track on-the-job training activities?		
2.	Who can mark on-the-job training activities as successful? Must administrators get involved in every task or can managers and/or senior team members perform all management tasks?		

Number	LMS Requirement	Compliance	Vendor Response
3.14. Continuing Education			
1.	How can the system manage and track continuing education (CE) required by certain professions?		
2.	Can users have more than one CE plan?		
3.	Can CE plans contain “fields of study”?		
4.	Can users use external activities (i.e., not part of the learning catalog) to meet CE requirements?		
5.	Can CE credits for a single course vary based on the user’s level of participation?		
6.	Can users “back report” credits if allowed by the licensing body?		

Number	LMS Requirement	Compliance	Vendor Response
3.15. Pricing and Payment			
1.	Does the system support pricing for internal cost allocation and external payment?		
2.	Does the system support multiple currencies?		
3.	What payment options are supported out-of-the-box?		
4.	Does the system support refunds and drop charges?		

Number	LMS Requirement	Compliance	Vendor Response
3.16. Marketing and For-Profit Training			
1.	What tools are available to market learning to end-customers?		

Number	LMS Requirement	Compliance	Vendor Response
3.16. Marketing and For-Profit Training			
2.	Does the system support discounting?		
3.	Can we sell content subscriptions?		
4.	Can we sell pre-paid training units?		
5.	How does the system meet our order management and revenue recognition processes?		

Number	LMS Requirement	Compliance	Vendor Response
3.17. Reporting			
1.	Describe the system's reporting capabilities.		
2.	How many standard reports are available with the system?		
3.	Does the system provide out-of-the-box manager-focused reporting (i.e., progress toward team development plans, team/individual-training histories, and certifications/completions) ?		
4.	Does the system support graphical reports (bar charts and pie charts) out of the box?		
5.	How can managers or administrators build their own ad hoc reports?		
6.	How can custom reports be created?		

Number	LMS Requirement	Compliance	Vendor Response
3.17. Reporting			
7.	Ability to configure dashboard to show various types of reports (e.g., graphs, charts, standard reports).		
8.	Ability to export data to various formats, including ASCII and Excel.		
9.	Ability to establish scheduled report subscriptions that can be sent via email.		
10.	Restrict view access to given reports.		

4. Content Authoring and Management Functional Requirements

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Number	LMS Requirement	Compliance	Vendor Response
4.1.	Content Authoring		
1.	Does the system include a separate authoring tool? Please describe ability to create high-quality content in a rich multimedia environment using a familiar Windows interface.		
2.	Can the authoring tool create content that is AICC and SCORM compliant? If so, what versions of AICC and SCORM are supported?		
3.	Can the authoring tool create/edit videos, audios, images, and embedded graphics with test questions?		
4.	Can authors access a shared object repository from the authoring tool?		
5.	Can the authoring tool create simulations?		
6.	Does the authoring tool support dynamic content sequencing?		
7.	Can the system deliver the same course using different combinations of reusable learning objects?		

Number	LMS Requirement	Compliance	Vendor Response
4.1. Content Authoring			
8.	What knowledge of programming is required to create interactive content?		
9.	Can the authoring tool produce content for mobile devices?		
10.	How do your products and services help with converting legacy content into trackable e-learning?		
11.	What other services do you offer to help customers with content interoperability?		
12.	Do you offer services to develop custom content? Please describe the tools used (e.g., authoring, virtual classroom, simulation tools, LCMS).		

Number	LMS Requirement	Compliance	Vendor Response
4.2. Content Management			
1.	What is the lowest level of content that the system can manage as an object?		
2.	What types of objects does the system support?		
3.	What authoring tools does the system support?		
4.	Does the system support the ability to roll back to a previous version of content?		
5.	Can the same content be published as “just-in-time” learning nuggets as well as full courses?		

Number	LMS Requirement	Compliance	Vendor Response
4.2. Content Management			
6.	How does the system deliver adequate performance to users located across the globe?		
7.	How can content administrators “purge” content that is no longer relevant while maintaining appropriate history?		

5. Social Learning Functional Requirements

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Number	LMS Requirement	Compliance	Vendor Response
5.1. Social Learning/Collaboration			
1.	How does the system support social/informal learning processes?		
2.	How can you assign mentors or coaches to monitor a user's progress? Can coaches, with appropriate permission, access a user's records?		
3.	Does the system manage the storage of informational materials, such as white papers, job aids, and product manuals?		
4.	Can the system capture informal conversations and ad hoc questions?		
5.	Does the system support wikis?		

Number	LMS Requirement	Compliance	Vendor Response
5.1. Social Learning/Collaboration			
6.	Can the system manage the exchange of information among subject-matter experts (e.g., IM messages)?		
7.	Can community members have shared goals?		
8.	Does the system create “communities of practice” that users can join based on their role in the organization and skill sets?		
9.	Can users be automatically assigned to communities?		
10.	Do community owners have a simple process for creating new communities?		
11.	How can community owners promote a shared identity for their communities?		

6. Unified People Management Functional Requirements

Please use the following legend to indicate compliance with the requirement:

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Number	LMS Requirement	Compliance	Vendor Response
6.1. Person Profile			
1.	Does the system include an extensible person profile that can be used to track job roles and responsibilities, skills, experience, education, etc.?		
2.	Is there a limit to the number of custom fields available with the user profile?		
3.	Can the person profile store information that originates outside the LMS, e.g., external certifications?		
4.	Can attributes of the user profile (standard or custom) be used to determine learning assignments?		
5.	Can users access their profile (e.g., personal details, status development plans, goals, training) on demand?		
6.	Describe the hierarchical structure of employee profiles and how senior managers can drill down on the profiles of all individuals within their organization.		

Number	LMS Requirement	Compliance	Vendor Response
6.2. Unified People Management Solution			
1.	Does the system provide performance management capabilities (e.g., for career management, performance reviews, goal management) or succession management capabilities as a unified solution with the LMS?		
2.	How does the system help users to prioritize their development activities in the context of their overall goals and priorities?		
3.	Can learning plans have an approval chain?		
4.	Can different geographies and business units define different types of plans, or similar plans with slightly different processes or workflows?		
5.	How can the organization measure development activities as a component of performance evaluations?		
6.	Does the system support succession management, where managers and HR work to identify potential successors for critical jobs across the organization?		

7. Career and Competency Management Functional Requirements

Please use the following legend to indicate compliance with the requirement:

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Number	Career Management Requirement	Compliance	Vendor Response
7.1. Career Management and Development			
1.	Does the system provide career management and development capabilities that are integrated with other performance and talent management processes? All they all part of one database/application?		
2.	Do employees have self-service access to complete a personal profile, including their picture, that can serve as an “internal resume” for that individual? Does this profile include information such as job history, education, certifications, relocation preferences, and special skills?		
3.	Can the system track and alert an individual that their profile has not been updated recently and requires their attention?		
4.	Does your system guide end-users to possible next career steps and required competency proficiencies		

Number	Career Management Requirement	Compliance	Vendor Response
7.1. Career Management and Development			
	based on job role requirements and other criteria?		
5.	Does the system provide skill gap analysis to employees and managers based on current and possible future roles?		
6.	Can individuals self-identify one or many career interests as part of their profile, so that they can be considered for these opportunities?		
7.	Can individuals view the descriptions and requirements (including detailed competency requirements) for each career interest/career step?		
8.	Can individuals and managers perform a gap analysis of the individual compared to the competency requirements of the targeted position?		
9.	Can individuals and managers work together to create a detailed career plan with competency requirements and recommended learning, experiential, or mentoring opportunities?		
10.	Can this career plan be open ended if needed? Can it be time bound if needed?		
11.	Can the career plan have an approval or acknowledgement chain when the plan is set, and		

Number	Career Management Requirement	Compliance	Vendor Response
7.1. Career Management and Development			
	when changes are made to the plan?		

Number	Career Management Requirement	Compliance	Vendor Response
7.2. Competency Management			
1.	Can a competency library be maintained in the system that defines individual competencies with a name, description, proficiency scale, and behavioral descriptors or indicators?		
2.	How much flexibility does the system have to handle unique competency models, proficiency levels, and behavioral descriptors?		
3.	Can these competencies be categorized or grouped by categories or families?		
4.	Can each competency have its own unique rating scale?		
5.	Can competencies be configured to be rated at the behavior level, so that the ratings given on each behavior roll up to an overall competency proficiency?		
6.	How do individuals monitor competency attainment?		
7.	Does the system include the ability to associate competencies to specific jobs, roles, and positions so that they can be assigned in bulk by HR?		

Number	Career Management Requirement	Compliance	Vendor Response
7.2. Competency Management			
8.	Does the system provide a means to integrate into a current in-house developed or off-the-shelf competency model? If so, how?		
9.	Can the system provide standard, out-of-the-box competency content?		
10.	Does the system allow the assignment of competencies to individuals and teams by their managers?		
11.	Does the system support workflow for multi-rater assessments of competencies? Describe the system's ability to support multi-rater and 360-degree evaluations.		
12.	Can employees complete a self-assessment against a competency or group of competencies at any time?		
13.	How are "held proficiency levels" calculated? Can self, manager, and multi-rater assessments be weighed so that certain assessments carry more weight than others?		
14.	Can the completion of a learning activity also update an individual's held level in a competency?		
15.	Can recommended learning be linked to specific competencies, so that individuals with a competency gap receive guidance as to how to close this gap?		

Number	Career Management Requirement	Compliance	Vendor Response
7.2. Competency Management			
16.	Can informal learning be used to close competency gaps?		
17.	Does the system support validation processes, whereby managers can validate MRAs or other assessments before a held level is granted?		
18.	How are competency experts identified and used for mentoring or knowledge transfer activities?		
19.	Can the same competency library and job hierarchy be maintained in one place to feed the performance management, learning management, succession management, career management, compensation, and workforce planning processes?		
20.	What reports are available to assist with competency management?		

8. Architecture and Configuration Options

Number	Architecture and Configuration Requirement	Vendor Response
1.	Provide a complete description of your system architecture. Include a diagram indicating each component's location with respect to a corporate firewall. Describe the logical tiers of the product (e.g., presentation, business logic, data access).	
2.	What technology standards do you support (e.g., J2EE, .NET, Web services, XML)?	
3.	Does the system require any client-side software other than the browser?	
4.	Does the system require installation of Active-X controls or applets?	
5.	Describe the ability to brand the application to reflect our organization's culture (e.g., add logo, define screens, lists, user options).	
6.	Describe the ability to create custom dashboards for individual users.	
7.	What capabilities do end-users have to modify the user experience to suit their preferences?	
8.	Can HR administrators implement configuration changes without help from IT?	
9.	Does the system include a set of open APIs?	

Number	Architecture and Configuration Requirement	Vendor Response
10.	Does the system allow employees and managers to work from a location other than the office?	
11.	Does the solution support single sign-on?	
12.	Does the solution interface with the enterprise HR system (e.g., to obtain personnel data and information about employee-to-manager relationships in the company)?	
13.	How can the product integrate with our enterprise portal?	
14.	Can managers designate other employees (such as an administrative assistant) as their proxy?	
15.	Can “alternate managers” such as project managers be given access to perform various tasks, such as assigning learning or viewing certification status?	
16.	Does the solution include out-of-the-box notifications that support both Microsoft Outlook and Lotus Notes? Please describe which areas of the application make use of notifications.	
17.	Can users perform actions directly from notifications?	
18.	Are notification text and “look and feel” configurable?	
19.	Is there access to an audit trail for actions performed within the system?	
20.	Does the system include embedded security so that certain users are granted special privileges and others are not?	

Number	Architecture and Configuration Requirement	Vendor Response
21.	Can the system be segmented by domain (for example, by business unit, organization, or geography), with each unit making their own decisions regarding business rules, form design (i.e., review forms or performance plan forms), or process?	
22.	Does the system provide internationalization and language support? How many languages are currently supported?	
23.	What Web browsers does your system support?	

9. Architecture and System Requirements (Behind-the-Firewall)

Number	Architecture and System Requirement	Vendor Response
1.	Provide a complete description of your system architecture. Include a diagram indicating each component's location with respect to a corporate firewall. Describe the logical tiers of the product (e.g., presentation, business logic, data access).	
2.	What are the recommended configuration requirements? Please list supported: <ul style="list-style-type: none"> ▪ Hardware ▪ Operating systems ▪ Web servers ▪ Application servers ▪ Databases 	
3.	Can the system scale to support new users over time without degrading performance?	
4.	Does the system scale via load balancing?	
5.	What is your largest behind-the-firewall implementation?	

10. OnDemand Environment

Number	OnDemand Requirement	Vendor Response
1.	Describe your OnDemand environment.	
2.	Where is the primary data center? Back-up data center?	
3.	Are your data centers SAS-70 certified?	
4.	Do you offer services in the Cloud?	
5.	Do you have a documented Business Continuity and Disaster Recovery Plan?	
6.	Describe the network topology for the OnDemand environment (architecture, Internet connectivity, staging environment).	
7.	Describe the hosting infrastructure.	
8.	Describe your system uptime over the last year.	

Number	OnDemand Requirement	Vendor Response
9.	How does the system scale to support growing user populations?	
10.	Does the hosting environment support load balancing and redundancy?	
11.	How is system usage and performance monitored?	
12.	Describe the data center's power backup.	
13.	Describe data backup and restore procedures.	
14.	What tools are used to monitor application availability?	
15.	How often do you perform infrastructure maintenance and do you notify customers of scheduled downtime?	
16.	Can customers control the timing of software upgrades? What support do you provide during the upgrade process?	

Number	OnDemand Requirement	Vendor Response
17.	Describe your approach to ensuring data security in the SaaS environment.	
18.	What is your largest OnDemand implementation, in terms of number of users and number of content items?	
19.	Please include your Service Level Agreement (SLA) with proposal.	

11. Security

Number	Security Requirement	Vendor Response
1.	Describe your security model, including network, data, and application security, data center security, application and system support, upgrades and maintenance, and personnel access rights.	
2.	Describe the password and authentication policies and methods.	
3.	How do you monitor system integrity, logs, intrusion detection, and system access (e.g., checking the logs to verify failed and successful logins, password changes)?	
4.	Describe the system's security methodology to ensure that only authorized users can access information about disciplinary action taken against a specific employee.	
5.	Describe the network protocols used to communicate between components of the system (e.g., HTTP, SQLNet, LDAP, SSL).	
6.	Does the system support 128-bit encryption and SSL?	
7.	Describe how features and content/data access can be enabled or disabled for specific user groups.	

Number	Security Requirement	Vendor Response
8.	Does the system have auditing capabilities (e.g., capture information whenever a content object is accessed to help the organization reduce compliance risk)?	
9.	Can the organization control which functions are audited?	
10.	Does the system log users off after a specified period of inactivity?	

12. Accessibility

Number	Security Requirement	Vendor Response
1.	Is the solution compliant with W3C Level 2 Accessibility standards?	
2.	Is your solution compatible with system tools such as JAWS v7.0+, Dragon Naturally Speaking, and Zoom text (tools to assist the visually impaired)?	

13. Implementation Services

Number	Implementation	Vendor Response
1.	Please describe your implementation methodology, including average implementation time.	
2.	Please include a sample project plan.	

3.	Describe the implementation team that will work on the deployment.	
4.	Please identify the roles and responsibilities for customer in a typical implementation.	
5.	Describe your approach to change management.	
6.	How does your company help its customers to address organizational issues such as process governance? How does your methodology bring together all of the key stakeholders in the success of a learning management deployment?	
7.	Describe your approach to risk management.	
8.	How is knowledge transferred from your team to the customer's ongoing support team?	
9.	Describe your methodology for migrating from another vendor's solution to your system.	

14. Support Requirements

Number	Support Requirement	Vendor Response
1.	Please describe your Customer Support policy. Include information about response times, escalation policies, and hours of operation.	
2.	In which countries do you have support personnel?	
3.	Can users and administrators contact Support representatives via e-mail or log inquiries online during non-business hours?	
4.	Is support available for extended (e.g., 24x7) hours, including support for all global regions?	
5.	What is your escalation process?	
6.	How frequently do upgrades occur? Describe a typical upgrade process.	
7.	What is your release support policy?	
8.	Will you agree to put a copy of your source code in escrow?	

15. Training Requirements

Number	Training Requirement	Vendor Response
1.	Do you have a staff of experienced instructors?	
2.	What is the recommended training curriculum for the proposed solution?	

3.	Do you provide on-site training? Please include a course catalog.	
4.	Do you provide customized training workshops?	
5.	Do you provide training via webcasts for uses in different geographical regions, including overseas?	
6.	Do you offer self-paced learning opportunities or the ability to play back training sessions (e.g., for end-users who cannot attend at the scheduled class time)? Are there informal learning opportunities?	
7.	Do you offer end-user training?	

16. Quality Assurance and Industry Standards

Number	Quality Requirement	Vendor Response
1.	Describe your software lifecycle development methodology.	
2.	Describe your QA process and approach to continuous improvement.	

17. References

Number	References	Vendor Response
1.	Please provide a list of three clients where you implemented projects of similar size and scope.	

18. Pricing, Terms, and Conditions

Number	References	Vendor Response
1.	What is your pricing estimate for the proposed system?	
2.	What are the hourly rates for services?	
3.	Please include a copy of your template Master Software and Services Agreements.	