HOW TO CHOOSE THE RIGHT TRAINING MANAGEMENT SYSTEM

21 VITAL QUESTIONS YOU WILL WANT TO GET RIGHT!

By Bruno Cozzi
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21 VITAL QUESTIONS YOU WILL WANT TO GET RIGHT!
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Selecting the right Training Management System for your organisation could be a ‘make or break’ decision. Get it right, the business grows and prospers. You and your team get to sleep peacefully.

BUT choose the wrong system and you’ll open the doors to frustration and restless nights. Rather than solving your problems, you could multiply them. For your organisation? - A waste of time and money.

This special guide written by one of Australia’s leading training management software experts will help you ask the right questions, find the best answers and deliver outstanding training outcomes for your organisation.

Along with 21 Vital Questions, this report also includes
- 13 Point Core Functionality Checklist
- 9 Warning Signs of Poor Usability
- 12 Industry Standards To Consider
- 22 Questions To Ask Your TMS Software Vendor
- 10 Warning Signs to Assess the Flexibility of a TMS
- 6 Checks to Assess System Performance
- 12 Core Support Requirements
- 4 Critical Product Road Map Warning Signs

“WHENEVER YOU SEE A SUCCESSFUL BUSINESS, SOMEONE ONCE MADE A COURAGEOUS DECISION.”
– PETER F. DRUCKER
ASK THE RIGHT QUESTIONS.
GET THE RIGHT ANSWERS.
GET THE RIGHT SYSTEM.
AND SLEEP WELL AT NIGHT!
WHAT IS A TRAINING MANAGEMENT SYSTEM?

Let's start by defining some of the different terms you will come across.

The terms “Training Management (TMS)”, “Learning Management (LMS)” and “Student Management (SMS)” systems may be familiar to people in the training and education sector, but despite common use, there are no clear definitions or distinctions between them.

In fact, if you were to compare the features between a TMS, LMS and SMS you could possibly conclude they're really all the same thing. They are different, and it’s important to know the key differences so you can decide what you need for your organisation.

**Training Management System**

Geared more towards training as opposed to academic education, a TMS is software that ideally manages all phases of your training business while fully integrating your face-to-face, online and blended learning environments.

A good TMS is a more complete solution optimised for the business of training. That means a good TMS would now typically include financial reporting, system integration, resource and document management as well as student management.

**Student Management System (SMS)**

The SMS is geared more towards education and academia. Older software solutions designed initially for academia were the first systems adopted by training organisations.

Student Management Systems were designed to manage student records including curricula, time tables, trainers and classrooms, enrolments, contact details, assignments, results, awarded certificate details and related correspondence. Traditionally, they were unconcerned with the issues, needs and requirements of a business. They came from a background of face-to-face or instructor-led learning. Since schools and universities were, and still are heavily subsidised by government, compliance reporting and process standardisation were an important component of SMS solutions.
The LMS is primarily designed for the delivery of eLearning content, though many enterprise organisations now expect their LMS to cater for both online and classroom-based activities. The LMS became popular in the late 90’s as the concept of online learning began and the need to host courses for delivery over the web emerged.

The LMS became the delivery platform for online content leading to the evolution of standard protocols enabling the course content to exchange information with the LMS. The first standard to emerge was AICC, followed by a series of Shareable Content Object Reference Model (SCORM) versions and editions. Today the latest SCORM protocol (SCORM 2004 Edition 3) is being superseded by more technologically advanced standards such as Experience API (xAPI – “The Rustici Tin Can Project”). Both the online learning content and the LMS need to comply and agree with one or more of these standards in order to share information.

Let’s explain the acronyms...

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>TMS</td>
<td>Training Management System: A system designed to manage the administrative process related to training.</td>
</tr>
<tr>
<td>SMS</td>
<td>Student Management System: Similar system to TMS with greater focus on student management and compliance. The TMS offers student management, but also embraces the needs of the training business.</td>
</tr>
<tr>
<td>LMS</td>
<td>Learning Management System: A system for hosting and delivering online learning. The TMS supports both face-to-face and online environments.</td>
</tr>
<tr>
<td>VET</td>
<td>Vocational Education and Training: A sector of the training market that deals with nationally recognised training and education.</td>
</tr>
<tr>
<td>SCORM</td>
<td>Shareable Content Object Reference Model: A protocol established by the US military and adopted worldwide to enable a learning Management System and Learning Content files to exchange data in accordance with a set of standard protocols.</td>
</tr>
<tr>
<td>Tin Can (xAPI)</td>
<td>Experience Application Program Interface: xAPI supersedes SCORM 2004, which is now nearly 12 years old. A great number of technology advances have taken place in the meantime. xAPI takes advantage of these developments.</td>
</tr>
<tr>
<td>RTO</td>
<td>Registered Training Organisation: A business that has been registered by a nationally recognised training authority to deliver training components from the Nationally Recognised Training Packages.</td>
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Compliance

Few LMSs are suitable for the Australian VET sector. In general, they are not compliant, because most LMS vendors are overseas and consider the Australian VET market too small and too difficult to justify the cost of the complex software development.

In Australia where the training and education sector is so heavily regulated, compliance and government reporting are essential, especially if you are a Registered Training Organisation (RTO). But even if you’re not an RTO, if you are delivering training in Australia you should look upon ‘AVETMISS compliant’ software as a measure of quality, just as you would an ISO 9000 accreditation.

But what if you’re not an RTO?

Whether or not you’re an RTO, you can reasonably assume software that complies with the rigid standards that govern the Vocational Education and Training (VET) sector in Australia is likely to have got the basis of training management right. Australian software vendors who have successfully implemented these rigorous standards in their software will probably deliver the high standard of quality that you will need in your training business.

Selecting the RIGHT Training Management System

In summary, a Training Management System (TMS) is a business solution designed for training organisations. It includes a SCORM compliant LMS and delivers all the functionality of an SMS.

It is therefore the most complete and integrated system available to organisations that deliver employee training, government funded training or fee-for-service training.

The 21 Questions in this report will help you select the RIGHT system, and it’s an important decision to get right. The future success of your organisation will depend on it.
Glossary, explaining some common terms

<table>
<thead>
<tr>
<th>Term</th>
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<tbody>
<tr>
<td>Course Catalogue</td>
<td>List of courses delivered by a training provider.</td>
</tr>
<tr>
<td>Curricula</td>
<td>Training or Learning Framework</td>
</tr>
<tr>
<td>Disaster Recovery Plan</td>
<td>A set of procedures designed to minimise the duration and severity of disruptions to a business brought about by the failure of a component of the system and the ability to recover from that failure.</td>
</tr>
<tr>
<td>Field Label</td>
<td>A label used to name a data entry value in a form.</td>
</tr>
<tr>
<td>Release Note</td>
<td>A document issued to customers of a software product describing new features, changes and improvements introduced in the current version (release) of the product.</td>
</tr>
<tr>
<td>Roadmap</td>
<td>A document published annually by a software vendor describing its planned roll out of new features and improvements.</td>
</tr>
<tr>
<td>Support Help Desk</td>
<td>As a customer of a software product it provides your point of contact with the vendor when seeking support or reporting issues. Generally good software vendors provide an online ‘ticketed’ help desk system for lodging and tracking issues raised.</td>
</tr>
<tr>
<td>Training Plan</td>
<td>An agreement between a training provider, the learner and the learner’s employer or manager that lays out the steps and competencies to be achieved within the learning period.</td>
</tr>
<tr>
<td>Training Records</td>
<td>A record of the training activities, attendance and results undertaken by a learner in a training program.</td>
</tr>
<tr>
<td>Uptime Guarantee</td>
<td>Warrants the percentage of time per month the server web application will be available.</td>
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Training Management System (TMS) is a business solution designed for training organisations that includes a SCORM compliant LMS and delivers all the functionality of an SMS.
WHO NEEDS A TRAINING MANAGEMENT SYSTEM (TMS) AND WHY?

Any organisation that delivers training and has a responsibility to create and maintain training records for its students or employees is probably in need of a Training Management System.

If you provide training and you need to ensure your staff, suppliers, contractors or customers are trained in the standards that govern your industry or in the products and services you sell, consume or deliver then you probably need a Training Management System.
Registered Training Organisations

If you are an RTO or are planning to become one, you will be aware of the regulatory reporting requirements and standards that govern the Vocational Education and Training (VET) Sector.

These are described in more detail later, but in summary, you are required, as an absolute minimum to have installed and be able to demonstrate a system capable of generating and lodging accurate AVETMISS data, or RAPT in Western Australia. However, regulatory compliance goes well beyond just AVETMISS Reporting.

Enterprise Training Organisations

If your department delivers training to your company's staff, contractors, suppliers and customers, i.e. internal training you'll need software that thinks the way an enterprise does.

You will need a software system that:

1. Exchanges data easily and regularly with your existing business systems
2. Understands your organisation chart and approval levels
3. Caters for internal billing or journaling through work order numbers
4. Profits from the convenience of online learning
5. Provides comprehensive resource planning and management
6. Offers active directory federated authentication
7. Enables your organisation to build its own reports
8. Has the capacity through APIs to integrate, expand functionality and provide report data sets
9. Manages access through portals, role based and fine-grain permissions
10. Can interface with your document management system
11. Provides a good architecture for content management

Whether you're an RTO or not, you will probably have your own specific set of compliance reporting and HR requirements. For your productivity, efficiency and peace-of-mind, you will want and need the sophistication, connectivity, reliability and security of a good Training Management System.
If there is one benefit that stands out above all others it would be ‘dedication to excellence’.

Having a workforce which is trained, competent and confident in what they do is an enviable business advantage in any market place, especially in the current competitive market where business and individuals constantly strive to identify value.

If you are serious about developing your people then you need systems to support you. A Training Management System is a major component of the solution.
A good cloud-based TMS delivered efficiently and professionally supported in Australia can offer outstanding benefits to your organisation:

1. The assurance of knowing that the training records of your students, employees, contractors, trainees, learners, suppliers and customers are securely and accurately maintained with little or no extra effort on your part.

2. Streamlined efficiency without duplication across multiple systems.

3. Accurate and timely reporting delivered to the people who need the information when they need it.

4. Recognition of training needs at individual, team and organisational levels.

5. Plans and processes that deliver competency and skills across the organisation helping you to meet your commitments, compliance and business goals consistently and efficiently.

6. An energised, confident workforce of high achievers and team players.

7. The ability to focus on training and all the other needs and pressures that your business demands without having to spend countless hours manually and laboriously filling in spreadsheets to track who has what competencies.

8. A TMS delivers a consistent and repeatable methodology with predictable outcomes, so your staff don't have to 'make it up' on the fly.

9. If you deliver training externally a TMS immediately becomes part of your quality management system.

10. The TMS provides an attractive, fun-to-use interface for your students, your administrators, managers and training professionals. A good TMS can be an addictively powerful productivity tool and the workhorse of your training business.

11. The option to offer fully integrated blended online and face to face training across your customer spectrum.

12. If you're an RTO, a TMS addresses all your VET compliance reporting requirements with minimal effort, including the requirement to store key training records for up to 30 years. At the same time, it will help you quickly comply with your regulatory obligation to easily generate accurate AVETMISS reports.

13. Ability to accept online payments and accurately invoice your clients while capturing accurate and supportable financial data. (This is especially important if financial transparency is a reporting obligation in your industry.)

14. The security of knowing that your data and services are securely managed in state-of-the-art data centres with no in-house infrastructure costs.

15. Finally, the knowledge that if anything did go wrong you have the support of a reliable vendor who can immediately get you back on track and keep your system up-to-date.
21 VITAL QUESTIONS YOU WILL WANT TO GET RIGHT!
Software that doesn’t even do the basics right is never going to deliver the outcomes you want. If you were to put those basics into a checklist that defines the workhorse of your business, it might look something like the 13 Point Core Functionality below.

You would probably have many other ‘nice-to-have’ features that you can work through with the vendor, but your ‘basic’ requirements must be met. It’s really important to have this list front and centre. It’s easy to get side tracked with flash and bling if you don’t have a clear picture of what you need.

13 Point Core Functionality
As a training organisation, you probably need your system to provide the following 13 areas of core functionality:

1. Create course catalogues
2. Schedule curricula items for classes and timetables
3. Allocate qualified and capable resources
4. Analyse individual and team training needs
5. Construct appropriate training plans
6. Enrol participants
7. Mark results
8. Mark attendance
9. Assess training
10. Correspond with stakeholders
11. Capture and store training records
12. Issue certificates and awards
13. Generate meaningful reports
TMS software that is clunky and difficult to use results in frustrated and unproductive administrators. If every engagement with the software is a bad experience, your people will resist using it.

It’s not an accident when good software is ‘easy-to-use’. Beautiful software has been well designed by usability experts and not just by programmers.

Being easy to use also means the data being kept in the system can be more accurate and free of errors. Inadequate validation, prompts, warnings, poor navigation and chaotic form layouts cause data entry errors. If not detected, these errors accumulate and come to a head when a critical report has to be generated and there are too many records to fix with no time to fix them. It can be a nightmare, and can be the cause of many sleepless nights.

Poor functionality and usability are the primary reasons people are turned off software. It’s important to factor this into your buying decision and if possible get your end users to assist in the evaluation process.

9 Warning Signs of Poor Usability

1. **Navigation**: It’s not clear how to get to a particular feature or page.
2. **User Controls**: You have to type in data that should be available in a list.
3. **Titles, Labels and Warnings**: There is missing or unhelpful information.
4. **Validation**: The software allows inappropriate or missing data to be submitted.
5. **Tracking**: You can’t get back to where you were.
6. **Consistency**: Different pages and forms look, work and behave differently.
7. **Clarity**: Screen and pages are busy and confusing.
8. **Documentation**: Documentation is out-of-date, poor or missing.
9. **Online Help**: Help is out-of-date, poor or missing.
3 QUALITY
Does it meet industry standards and guidelines?

It’s difficult to assess a system without evidence that it meets any accepted industry standards and guidelines. Even if you were an expert, you’d have to do a lot of work to determine whether design meets requirements. The training industry is awash with standards and guidelines, but while training providers are regulated, vendors of training management software systems are not. Any vendor that is serious about providing solutions to this industry would ensure their customers can meet the regulatory standards required within the industry. Even if your organisation is not a registered training provider, there’s no harm in purchasing a solution that has been designed to meet industry standards. Purchasing a system that is AVETMISS 7 and USI compliant doesn’t mean you have to submit AVETMISS reports or collect Unique Student Identifier numbers, but it does mean the system you’re purchasing has the proven ability to collect the necessary data and implement the relevant processes recognised by the Australian Vocational Education and Training sector (VET).

INDUSTRY STANDARDS TO CONSIDER

- 2015 Standards for Registered Training Organisations (SRTOs)
- Australian Qualifications Framework (AQF)
- Australian Skills Quality Authority (ASQA)
- Australian Vocational Education & Training Management Information Statistical Services (AVETMISS)
- Commonwealth Register for Institutions and Courses for Overseas Students (CRICOS)
- Higher Education Contribution Scheme - HELP (HECS)
- National Centre For Vocational Education Research (NCVER)
- New Zealand Qualifications Authority (NZQA)
- Shareable Content Object Reference Model (SCORM)
- Tin Can Project or Experience Application Program Interface (xAPI)
- Unique Student Identifier (USI)
- VET-FEE Help, student training assistance contribution (VET-FEE Help)
4 LONGEVITY

How long has the TMS product and vendor been around?

As a training organisation, you have an obligation to retain accurate records. For RTOs, this obligation lasts for up to 30 years.

Investing in partners with no track record in the industry could be disastrous for your business and not worth the risk. It’s smarter to work with a vendor company that has demonstrated commitment and continuous improvement over many years.

Ask the vendor or their reseller plenty of questions to find out their track record and future plans. Make the questions relevant to your industry, standard operating procedures, compliance reporting requirements and your geographic location.

22 Questions You Should Ask Your TMS Software Vendor

1. How long have you been in the business of providing training management solutions?
2. How long has your product been on the market?
3. What development, training and support people do you have on staff?
4. How many clients in my sector are currently using your product?
5. What are your support policies and procedures?
6. Do you provide training on your software?
7. Is your business financially viable?
8. What happens to my data / product / support if you go out of business?
9. How have you tested your software?
10. What tests have you performed?
11. How do you keep the software up-to-date with industry changes?
What’s your policy for backups and disaster recovery?

How do you test for and prevent security threats?

How do you measure system performance?

How do safeguard against breaches of privacy?

Where is the data stored?

What is your data protection and management policy?

Are these policies included in your staff contracts and are your employees and contractors aware of them?

Do you provide a product roadmap to your clients and how often is it updated?

What is your continuous improvement and release policy?

How do you track and resolve bugs and defects?

Do you have a change management policy?
Flexibility is not just important. It is vital that any TMS system you implement still allows your business to be nimble and agile as your needs and wants evolve in the future. A system that is rigid with little or no capacity to modify the functionality when you implement it will rarely be able to respond to your needs if you want to do things a little differently later on.

Over time, you have developed processes and procedures to suit your business and your clients. Investing in software that forces you to compromise and re-engineer your business processes for no better reason than to match the peculiarities of the software should sound the ‘inflexibility’ alarm bell.

On the other hand, a flexible solution that allows you to cost-effectively configure and customise through easy-to-use settings will enable you to reap functional benefits while maintaining your tried and tested methods.

10 Warning Signs to Assess the Flexibility of a TMS

1. Field labels and titles that are irrelevant you, but can’t be changed.
2. Having to complete unnecessary steps to perform what should be simple actions.
3. Fixed and inappropriate wording presented to your clients that you can’t remove or change.
4. List items limited to only what the vendor provides.
5. Having to go back to the vendor for minor and trivial changes.
6. Being asked to use inappropriate fields and forms to perform unrelated tasks.
7. Inability to capture custom fields.
8. Inability to brand your web pages.
9. Rigid workflow processes that don’t work the way you do.
10. Rigid templates and notifications that don’t suit your business.
Will it talk to your other business systems?

Lack of integration capabilities leads to massive inefficiency. A system that can’t talk to your existing business software means duplication, risk of human error and having to manually synchronise data.

If your business is already established, you will have other systems and processes in place that you would want to integrate with your new training management system. Look for a solution that has integration capabilities and services for your HR, CRM, Document Management, Billing, Resource Planning and other line-of-business systems.

These will minimise duplication and streamline processes, saving time and reducing the risk of errors. Most systems probably won’t be able to integrate instantly out-of-the-box. Some development effort is generally required, but it can be costly. Integration tools and features that have been designed and thought out beforehand can dramatically reduce cost.
Having your software running on a single computer or even on a Local Area Network (LAN) server just doesn’t cut it anymore. Nor does having a handful of desktop licenses for a system and database located at head office. Your competitors can already connect with any device, anytime anywhere and operate on centralised shared data. They’ll leave you for dead.

With some TMS software, you could host the solution in your office, allow VPN access to your staff, and even web access to your market. But the cost of trying to replicate a service that a good data centre could offer for a fraction of the price doesn’t add up.

Like every other business these days, your training organisation needs the ability to have a central resource that can be accessed by people on the move and working across states and territories on multiple devices.

A cloud-based solution means you get the services you need, anytime, anywhere without the cost, effort and responsibility of having to manage IT infrastructure. If it’s not a key requirement now, chances are it will be in 2 to 5 years’ time.

8 SECURITY
Are YOU likely to be hacked?

The internet is becoming a playground increasingly frequented by hackers and cyber-attacks. You need to ensure your TMS partner is up to speed and protecting you from these risks.

Most importantly, insist on a completely secure site that applies SSL encryption and certificate to protect all pages in your TMS site.

Systems that offer clean secure isolation between people, roles, internet and intranet environments have generally taken security seriously.

In addition, the ability to login as either an internal user with an Active Directory account or an external user with a standards-based forms authentication gives you options around how to implement your TMS security.

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Systems that offer clean secure isolation between people, roles, internet and intranet environments have generally taken security seriously.
No one trusts a service that’s not there when they most need it. Choose a solution provider that will guarantee at least 99.9% Uptime.

This level of Uptime is not hard to find these days and it means you can be confident that when your stakeholders need to interact with your TMS it will be available and accessible.

Furthermore, the provider should be able and willing to offer 3rd party tools for you to test, measure and get regular reports on availability. Typically, the Uptime Guarantee does not include planned maintenance and planned downtime. Often your data centre will need to take sites down to upgrade hardware and software, address security vulnerabilities, or address operational defects in the service. Make sure that when this happens your provider notifies you with plenty of time and options so that you can plan around their known outage schedule.
10 PERFORMANCE
Is it slow and clunky?

The best training management processes in the world can be ineffective if the software and hosting infrastructure doesn't perform to expected standards. If your screens appear to freeze or timeout unexpectedly with no indication of what the TMS is doing, your users will eventually lose trust in the system. At worst, they’ll stop using it... and at best, they will avoid important steps they know to be problematic. These issues generally show up when you try to run reports, refresh screens, submit forms, and try to upload or download documents.

Well-designed software aims to deliver great performance. The user interface should be fast and responsive. The average page should load in less than 5 seconds.

Reports can take significantly longer. Any actions such as producing large reports typically take time and use a lot of computer-processing power and memory should be able to work within the system as separate processes that don’t interfere with critical TMS operations.

Well-designed software aims to deliver great performance. The user interface should be fast and responsive.

The average page should load in less than 5 seconds.

CHECKS TO ASSESS SYSTEM PERFORMANCE

- Open lists that return large volumes of data, e.g. schedules – and assess load time.
- Run reports in the system and see if you can still use the TMS while reports compile.
- How long did it take to run the report?
- Navigate to pages on the site – how long do they take to load?
- Click to edit data – how long to load?
- Make changes and save – how long to save?
Good software solutions include workflows as an integral part of process design.

A solution that is not capable of handling reminders alerts, approval requests and other workflow operations will require your staff to do more manual work and risks manual errors.

Workflow design requires thought and planning, but it’s easy to neglect this important aspect of communication.

Your system should consider two types of workflow:

1. Event-driven where an action in the TMS triggers a workflow that might send an email or SMS.

2. Time-date driven where some status is checked at a point in time and an appropriate action is initiated.

In both cases the system should perform communication and actions that ensure efficient process flow.
12 DELIVERY
Are YOU restricted to one mode of course delivery?

This is the digital age and good training and learning practices must at least consider the benefits of blended learning, a mix of face-to-face and online.

Don’t be left behind. Don’t allow your new TMS to restrict how you deliver your training.

Your organisation might be purely one or the other, but a system that can integrate both online and face-to-face options offers flexibility.

More and more training organisations are recognising the convenience and benefits of online training. The technology has improved substantially in recent years to the point where online training can now be a highly effective adjunct to your training modalities, or your preferred modality. But if you intend to use both, i.e. to provide blended training, make sure the two environments are fully integrated.

There’s nothing worse than thinking you’re getting an automated, hand-free online solution only to find that you have to manually re-enter data to satisfy your face-to-face training environment.
Content and documents are vital components of training. Your admin and instructional development team will become quickly frustrated if they have to jump through unnecessary hoops to align your courseware, online content, assessments, and online course catalogues.

A comprehensive training management system should either provide the Content and Document Management functionality you need or enable you to integrate with an existing content/document management system.

Whether separate or integrated, the two systems should enable you to store, manage, and retrieve content; assign access rights; handle all the common document formats including video; align content to your curricula; and provide version control. All users of your system should be able to access and manage folders and files that are relevant to their role and permission levels.

13 CONTENT MANAGEMENT

How does it handle content and docs?
14 DATA SOVEREIGNTY
Can YOU control the privacy of your data?

If your data is being hosted on an offshore server, you will not be able to assure the privacy of your learner data complies with Australian Privacy Laws.

Governments in many countries and particularly the US can demand that a cloud-service provider releases any and all data on the users in your database that may be on the hosting servers.

If the server is not on Australian soil, then neither you nor the Australian government have any sovereignty control over those decisions and your users could be within their rights to sue you for breach of privacy.

It is therefore imperative that your training management system, or at least the database within it, is hosted on Australian soil.
All training environments incorporate roles and access rights. You want members of these roles to be able to access what they need when they want it.

Allowing logged in users to access your site through the admin portal is like giving away the keys to the kingdom. Trying to manage a complex array of access rights and role-specific information through a single Admin portal is fraught with security risk. It’s also highly labour intensive in terms of setup and management. That’s assuming your vendor gives you the ability to set permissions.

On the other hand, trying to support your users through a public website with no knowledge of who they are is like herding cats. Having all users anonymously access your valuable resources through a public website is clearly not practical. Firstly, your system has no way of identifying people using the service. Secondly, those users would need to access everything whether it’s relevant to them or not. That creates confusion for your users.

Your training management system should provide appropriate portals for Admin staff, Trainers, Managers and Students who each have secure credentials and appropriate authorisation. With this approach, all you have to do is add a user to one or more roles and their portal access is automatically determined. This is secure and ensures that you can provide only the information they need and that you want them to see.
Is the product within your budget?

The ‘price’ question can get complicated and confusing. There are many overly expensive ‘Rolls Royce’ systems as well as a few low cost systems. You may not need the Rolls Royce so the investment might be put to better use.

As always, look for value. Is the solution likely to deliver the benefits and/or cost savings you require?

Cheap ineffective solutions that don’t do what you need, provide poor support and are difficult to use typically end up costing you far more.

The best solutions offer a range of product Editions to suit your needs and budget, along with good support and well-designed reliable software you can trust.

For web-based solutions that are approved for use in the compliant vet sector you could expect pricing as follows.

| Private small training providers | $5,000 to $10,000 per annum |
| Public Apprentice and Trainee centres | $8,000 to $20,000 per annum |
| Fully inclusive Enterprise solution, integration and customisation | $50,000 + per annum |

Please note: These price ranges represent the ‘Total Cost of Ownership’. In practice, the licensing might be per user, per registration, or unlimited users.

You should also expect to allow at least an additional 20% in the first year for set up, data migration, training and branding of your TMS.

Don’t forget your own ‘Internal Costs’. You will also need to invest internal resources and effort in the first 30 to 90 days at least.
The best products in the world are of little use if you can’t operate them due to lack of support and training. You’d be surprised how many training providers assume and expect support without checking the terms and conditions of the contract. Be very clear about what support and training is included. If it is not explicitly included, support and training is probably excluded from the quoted pricing. Get pricing and commitment to ensure your company has access to these core support requirements.

12 Core Support Requirements

1 Adequate user training.
2 Updates and bug fixes.
3 An online ticketed support help desk.
4 One on one phone and screen sharing support.
5 User Manuals and self-support tools.
6 Cost effective data migration.
7 Start-up assistance and a viable user acceptance test period.
8 Uptime guarantee of 99.9% or better.
9 Updates to ensure continued compliance.
10 Release notes describing changes with each version update.
11 Road map outlining the vendor’s intentions to deliver new features and improvements.
12 Clear process and assistance for setup, implementation and adoption.
Can YOU meet your legal obligations?

As an organisation you have certain obligations in relation to Australian or New Zealand law. They include privacy, solvency, reporting, financial management and transparency. Ensure that your solution assists you to meet your legal compliance requirements.
Implementing a new business system in your organisation is never a trivial undertaking. If you fail to plan for this phase there is a very real risk that you could spend months playing catch-up. Meanwhile your team will become increasingly frustrated as they battle with missing data, missing documents, incomplete templates, workflows and crude reports.

Compounded by lack of training and support, your low budget implementation could quickly become one of the most costly mistakes the business ever made.

Look for solutions that include thorough implementation where they guide you each step of the way. If it’s not included, be sure to understand what you are getting and at what price.
20 ROADMAP
What are the plans for future development?

Will the vendor share their product roadmap with you? If so, then great! And if not, why not?

It’s important to understand what features are going to be added to the software and when. This could save you expensive customisation or having to be unduly concerned about missing functionality that could be just around the corner.

A good software solution vendor provides a roadmap that enables you as the customer to know the new or upgraded features being planned for the product. If features you require are missing, but they are planned on the roadmap; then as long as you don’t need them now, you can wait and plan for their implementation once they are released.

The challenge for most vendors and most customers is that the features on the planned roadmap invariably change over time. Ensure your solution vendor keeps you up to date with changes to their roadmap.

If the vendor does share their roadmap with you, then look for any tell-tail signs of ‘lack of commitment’ to the planned objectives.

Four Critical Product RoadMap Warning Signs

1. **No status or progress updates to the roadmap.**
2. **Roadmap items that promise impossible functionality in ridiculously short time frames.**
3. **Lack of progress or status reporting.**
4. **A good way to test the waters is to ask your vendor for a historical roadmap. Were the features promised back then implemented as planned? If not, why not?**
What licensing models are offered?

You could be forgiven for thinking that a perpetual one-off license represents best value for money, and 10 – 15 years ago you would have been right. But not any more. Good software cloud vendors tend to deliver ever increasing value over time. They do that by having:

1. An incentive to earn your subscription renewal every month / year.
2. Regular cash-flow through subscriptions, reallocated to ongoing continuous improvement.
3. The opportunity to manage change, e.g. legislation and compliance in your industry.

Today, even government agencies are welcoming cloud solutions for the many benefits they offer over expensive and static infrastructure, agility to change, risk mitigation and low cost of ownership.

Whether you’re a small training organisation or a large enterprise, the high cost of infrastructure, irrelevance, resistance to change and obsolescence are real threats and should be mitigated.

Cloud services are not a silver bullet in all situations. But in general the figures stack up, as long as your solution vendor is committed to delivering value for money along with a continually zealous determination to strive for excellence in their market space.

Look for those traits in your chosen vendor BEFORE you make your decision and your purchase.
WHERE TO NEXT?

I trust this article has provided some help in identifying the key criteria for making your Training Management System buying decision.

You will add more selection criteria of your own as you learn more and invest more time to identify the RIGHT Training Management System for your organisation.

Make sure you make the right selection decision BEFORE you sign a contract to buy a system and start to implement it. It’s too late then to find you’ve bought the wrong system. The last thing you need is to be locked in to an expensive lemon!

Getting it right is well worth the effort. Particularly where you, as a training provider are regulated and governed by exacting standards, but the people who design and deliver your key software systems are not.

If you are in any doubt or would like the benefit of a quick phone chat or an obligation free audit of your systems and your own specific requirements, please get in touch. We’re here to help.

All the best and Good luck!

Bruno Cozzi
Phone: +1300 456 899
cozzib@bluegem.com.au
Bruno Cozzi is the Managing Director of the innovative training and learning management systems development company, Bluegem Software. With many years dedicated to technical management, business analysis and high quality software solutions, he leads a happy and vibrant hub of intelligent creative professionals, aching to continue to prove they are the best at what they do.

Bruno Cozzi graduated in England in 1986 and migrated to Australia in 1988. Since then, he has been continuously involved in the design, development and project management of electronic and software ICT projects across Australia, Europe, Canada, and Southeast Asia.

In early 2000 Bluegem was engaged by a Perth-based company to design, develop and support what was then a revolutionary captured learning system for Canada's largest oil and gas company. On returning to Australia, Bruno set about learning everything he could about the Australian VET Sector, Corporate Training solutions and the management of training records.

Bluegem, a Microsoft Gold Partner employing a dedicated team of software professionals, embarked on a mission to develop Australia's most effective, compliant and user-friendly system to meet the needs of training providers. That was in 2004. Today Bruno still jumps out of bed early every morning with a spring in his step, ready to meet new challenges, learn new technologies and deliver outstanding solutions.