Learning Management System implementation – Building Strategic Change

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ABSTRACT

This article, reviews the implementation of a learning strategy at a major University in the United States and the process to manage change through a Learning Management System implementation. The lessons learned detail best practices and lessons learned. It details the importance of a strategy and lateral buy-in. The change process was maintained and managed laterally rather than from top-bottom. It was achieved through the involvement, acceptance, and participation of the stakeholders, who would benefit and be the most affected by it.

Keywords: Change Management, Implementation of a Learning Management System, Learning Strategy, LMS.

1. INTRODUCTION

The University of Miami reinvented the process of professional development and training within the organization from static to dynamic by instituting the use of a learning management system to automate the registration process, give real-time access to the training course guide, give employees access to their training records, and create a portal to online computer-based learning modules (CBL). A Learning Management System, or LMS, as defined by most users in collaboration forums and in the industry, is a solution package that allows for the delivery and management of content and resources to all employees. The system is usually Web-based and provides continuous access to learning content and administration. At a minimum, the LMS allows for participant registration, the delivery and tracking of e-learning courses and content, testing, and may also allow for the management of instructor-led training classes. In the most comprehensive of LMSs, tools such as competency management, skills-gap analysis, succession planning, certifications, virtual live classes, and resource allocation are provided.

The initial implementation of a LMS (NetLearning) at the University of Miami in June of 2004 under the leadership of Marcia Beckford, Executive Director of the Professional Development and Training Office (PDTO), met the minimum requirements for a system of that nature and at that time met a myriad of needs for the University community. Beckford's vision was to tie professional development goals with performance evaluations and to create a reward system that would award those committed to professional development and their skill gaps. Beckford understood that NetLearning was not the right system to support that vision. NetLearning had been purchased to track and publish training at one of UM's hospitals and was never meant to be used as an enterprise wide solution. Scalability would become a major concern. This was validated a year later, when increased usage slowed the backend of the system. It became apparent then, that NetLearning could not offer the features needed to support the e-learning and professional development goals set for the effort. To deal with resistance, data would need to be collected on the benefits of a LMS for the organization and why NetLearning would not be able to support the alignment of professional development goals with business results. Even though NetLearning did not have the needed functionality, it became part of a strategy for change.

2. UNDERSTANDING THE NEED

Despise all the successes and positive outcomes of the initial implementation, the goal for the LMS had changed significantly since its inception. In 2004, when it was launched, the goal was to track courses and provide 24/7 availability, which would decrease live course contact due to time constraints. This goal was accomplished as shown in Figure 1.1. The goal for the LMS morphed into the need of providing a vehicle to assist in career enhancement through competency development, tightening learning plans and using professional development as a vehicle to lead to reduction in turnover due to skill gaps in leadership. Based on user feedback, limitations of the initial system, NetLearning, and the direction of the strategic plan, a decision was made by Beckford to eventually migrate to a new environment that would provide a more comprehensive learner-centric experience to the learners and would meet organization goals. The need for this change was supported by exit interview data, performance issues, and the interviews conducted by the business and finance system design team at the University of Miami. The organization needed a system that could provide compliance reports and data on skill and competency gaps that could be translated into career mapping and then be used as tools for succession planning and promotion. To get the financial support and buy-in for a new system, a plan was set in motion to establish the needed infrastructure and to guide training practitioners through a paradigm shift on how professional development was to be done at the University. The goal was to emphasize the shift from lecture based content to measuring the impact of learning on the job place.

Before we can understand the steps taken to manage change during this period, it is important to understand the events and outcomes that transpired from this implementation and the successes that enabled the organization to accept the shift from instructor-led training to a blended format approach that helped minimize resistance throughout the process. Beckford's strategy was to create the structure needed to support the vision for the organization's learning, even without the adequate tools. As the projects were rolled out, the stakeholders were open to the possibilities and were coached on the acquisition of skills needed to implement such change. The changes to professional development in the 4 years under Beckford's leadership have been remarkable. Employees have gained access to required online modules 24/7 from any environment that allows them to learn. The online portion of the system allows employees the flexibility of learning at their own pace and at a time that is more practical for them and their departmental needs. Because now training addresses knowledge, skills, behaviors, and attitudes, various levels of knowledge acquisition are equalized. This expedites the skill-building process by concentrating on practical experiences that increase transfer of learning back to

the job. Trainers' gain time for skill building by utilizing the content creation tool to impart knowledge; thus, more classroom time can be used to focus on proficiency training reinforcement, feedback, and learners' questions. Since NetLearning's implementation and as of this writing, 430 online modules have been designed and developed by various departments, utilizing both the learning management system and content creation tools.

3. THE CREATION OF A SUCCESSFUL STRATEGY

PDTO e-learning and distance education strategy produced a paradigm shift at the University that created opportunities as well as challenges for the department. The change strategy was implemented starting in early 2005, and included the following steps as recommended in Roger's Diffusion Theory [1], (1) identification of a champion for change, (2) realignment of existing resources, (3) increasing number of course offerings and traffic to the system, (4) set standards and model innovation behavior, (5) get lateral buy-in as well as from leadership, and (6) partner with designers and SMEs. PDTO's plan included, create excitement, and show proof. PDTO created excitement by:

- Identifying and getting the support of a champion;
- Keeping the champion informed;
- In the beginning going for quantity, increase traffic in the system and number of online offerings available;
- Collect data on system usage, participant feedback and manager's comments;
- Brand the system early so people feel they own it; and
- Educate stakeholders on the possibilities and have them promote standards and best practices

The first step in the process was to find a champion who would be supportive of the effort and who could promote the initiative at higher levels within the organization when needed. PDTO found champions in Thomas Roosevelt, vice president for Human Resources and Paul Hudgins, associate vice president for the Miller School of Medicine. They believed that this initiative would bring employees professional development to the twenty-first century.

The second step was the realignment of existing resources. Different processes and tasks became automated after the implementation of NetLearning. PDTO's employees had to be repurposed and different positions created to accommodate the new business requirements and goals. The staff needed to take on a more consultant and coaching role. Beckford assed the staff and identified skill gaps that needed to be closed before they were ready to take on the challenge. A staff professional development plan was created to allow staff members to gain the necessary skills and be ahead of the curb in promoting the standards and principles of distance education and adult learning, this allowed them to move from transactional to transformational work.

The third step was to promote e-learning, not the tools. This meant that the online modules were initially created using tools that designers were most comfortable with – for example, PowerPoint. PDTO concentrated in promoting best practices for e-learning and to introduce different methodologies and techniques into its own online modules. PDTO introduced new tools, and used different departments and initiatives as pilots for the new technologies. Beckford understood that, in many cases, training practitioners within the University did not have a training background, and because of that, they lacked the skills needed to effectively design training. A forum was created to train training practitioners on instructor technology methodology, new tools, and techniques. PDTO started to act as consultants on best instructional design practices, guiding the stakeholders from outline presentations to interactive content and sound design. As practitioners became familiar with new technology and tools, they demanded different functionality from the system. As those feelings became widespread, support for a new system grew stronger. Through collaboration efforts and training the stakeholders were now able to make an educated decision on what they needed and why.

The fourth step was to set standards and model innovative behavior. PDTO promoted blended, adult learning, and distance education principles through different initiatives. Instructor-led training (ILT) offerings were redesigned and converted to modules, using learning objects that had one or several online components. PDTO implemented these principles in high visibility projects like New Employee Orientation. The collection of data and feedback from these projects were encouraging to the stakeholders, who started creating online modules to ease their training schedule and provide learners with 24/7 access to online tutorials and help. PDTO instituted standards and guidelines to direct the department and stakeholders on what needed to be done during and after the implementation. Migrating from a pure instructor-led environment required different skill sets and different processes. A road map was created that included the process for diffusion, communication, and engagement of those who were responsible for training functions within the University and would benefit and be impacted by the implementation of a LMS.

The fifth step was to get lateral buy in as well as from leadership. The support arose from data gathering and collection. Charts like Figure 1, showed leadership that employees wanted to participate in professional development activities and would do so if available to them when and how they needed it. The resulting savings as illustrated in Table 1, and change in performance helped solidify the support and minimize resistance. The Professional Development Council (PDC) was created in 2005 to promote adult learning principles, standards, benefits and best practices of e-Learning among those with a training responsibility at the University of Miami. The PDC became a learning platform and a collaboration effort that helped identify business requirements and the need for a new system. Most PDC members were also NetLearning system administrators that although using the system for online learning, were nevertheless, refusing to offer the bulk of instructor led courses in the system due to the effort needed to setup and complete those classes. Their input later became an integral part in identifying the requirements for a new LMS.

The sixth step was to partner with designers and subject matter experts (SMEs). PDTO partnered with designers and SMEs to create online modules that supported good instructional design methodology. These modules became beacons of what good e-learning could and should be like. These pilot programs helped gradually promote the desire among different stakeholders of acquiring the necessary skills to produce effective training and use different technologies. PDTO's strategy included developing a competency-based program for training practitioners that provide opportunities for skill gap analysis and training in different areas of instructional design, adult learning, and distance education principles and methodologies.

4. BLENDING BUSINESS REQUIREMENTS AND BEST PRACTICES IN ONE LMS

As learners became more sophisticated, they started demanding different things from the system. The growth of the University demanded that training be delivered to employees who were not physically located on campus, and were located in satellite offices across Florida as well as worldwide. Learners started questioning the value of instructor-led sessions. The support for a blended approach that promoted learning and maximized both the time of the learner and the organization grew. To address that need, PDTO introduced the University community to synchronous virtual training sessions. Elluminate (an application that provides a synchronous virtual environment) was used for feedback sessions and to allow those in remote locations to participate in training sessions that otherwise would not be available to them. As tools were added to increase interactivity and support distance learning, NetLearning's inefficiencies became more pronounced.

PDTO started collecting more data to promote the buy in of senior leadership for a new LMS. Focus groups and surveys conducted between the PDC, Users and NetLearning System Administrators identified the features needed in the new system to accommodate the growing business needs and learning needs of the University community. These features were compiled into a requirement list used to research and select a new LMS. These groups participated in the final decision process and provided the necessary comments and feedback to support a change in system. They were part of PDTO's strategy for change since NetLearning's implementation and now became vital partners in the search for a viable solution. These groups understood the vision and business requirements that the replacement system would need to meet in order for the initiative to be successful. It was paramount that these users thought not only of their unique requirements, but consider as well the enterprise requirements for the system. PDTO mediated interest groups and was responsible for bringing all requirements under one banner as well as to meet due diligence in researching and implementing a system that met the global needs of the enterprise.

Fifty six systems were researched using three major areas: functionality, cost and vendor's responsiveness and customer service. From those, five systems were previewed by PDTO's leadership team and two were then selected to be previewed by all major stakeholders. Data collected after the previews and information sessions revealed an overwhelming consensus among the stakeholders on which system to select. It is important to note that both systems were extremely similar and met 99% of the requirements identify by all stakeholders. This consensus was a strong witness to the success of the change management process initiated by Beckford's leadership in 2004. The group, composed of 50 people, branded the system as ULearn and participated actively in the communication and diffusion projects implemented to pave the way for the system's implementation June 1st of 2007. They were and still are an integral part of the strategy to manage and support the change management process at the University during the migration period.

5. THE ROAD AHEAD

Even though Netlearning has provided each department in the University with the autonomy to access and maintain its own training records, and met the initials goal set for the effort, ULearn expanded on those achievements to bring professional development to a new level. It also provides the tools to support senior's leadership goals for the organization. The e-Learning and Professional Development strategy is built on the new system functionality and allows PDTO to create a learning structure that promotes "learning as needed" environment. Netlearning ensured the accuracy and validity of professional development activities by giving control and oversight to the content experts. ULearn identifies and prioritize key positions for prescriptive learning. It assesses employees and provides them and their managers with a roadmap to close skill and competency gaps that are then customized automatically in an Individualized Learning Maps within the system. Those learning maps address the employee's performance gaps, compliance requirements by job role and learning needs. The system acts, furthermore, as a needs assessment tool that identifies areas needed to be added to training curriculums and course offerings. It allows training professionals at the University to work with senior teams to support, monitor and measure learning and performance. ULearn enables managers to fast track high-performing employees by placing them into the right training, supporting succession planning and promotion tracks. Moreover, it creates an immersion process for new employees with defined roles and clear expectations that will help reduce attrition and place appropriate candidates in the right positions.

NetLearning allowed employees to register for live sessions and access computer-based modules when it is was most convenient for them. Employees also benefited from the ability to learn at their own pace and review course material as often as needed and to have access to compliance and regulatory training. ULearn allows now managers to register employees for training and create development plans as part of their annual performance evaluation review. It also tracks progress and correlates training to the job, while at the same time creating the ability to measure the impact and transfer of learning to the job. It monitors compliance data by automatic reporting to supervisors of noncompliance with training requirements. Managers are now starting to take accountability for the professional development of their staff, particularly for regulatory legal and safety compliance. The new system enhances the managers' ability to access resources for their employees in order to improve their performance. The system will soon be able to automatically define and map regulatory compliance training for all employee positions. ULearn enables professional development activities to become individualized and to be tracked in one central location to support employee development and performance as it places one of the University's greatest assets, the employees, in the forefront, to support the growth and strategic plan of the University.

CONCLUSION

The success of the NetLearning implementation and the migration to ULearn were possible because of the strategic vision used to manage the change process. Both events were not the culmination or the final goal, but they were part of a strategic plan for a paradigm shift in professional development at the University of Miami. The lessons learned detail that best practices research, collection of data, and lateral buy in were critical elements in bringing about and maintaining change. This process showed that change can be initiated and supported at different levels without having to be initiated by senior leadership. The involvement of senior leadership in this process

was planned and requested at strategic points during the process to minimize roadblocks and resistance. Change was maintained and managed, through the involvement, acceptance, and participation of the stakeholders, who would benefit and be the most affected by it.

References

[1] Rogers, Everett M. "New Product Adoption and Diffusion". *Journal of Consumer Research*. Volume 2 March 1976 pp. 290 -301.

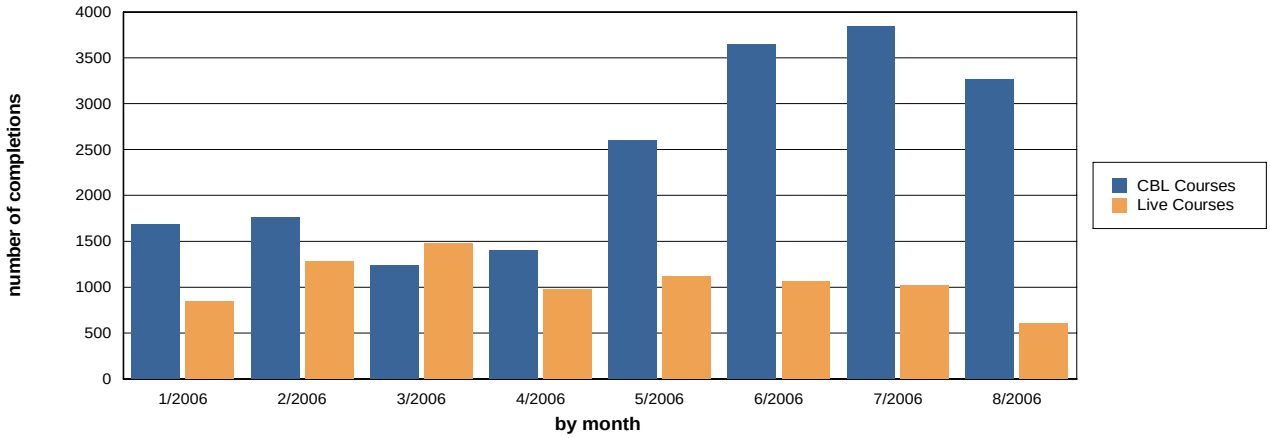

Figure1. Number of participant course completions for January – August 2006

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Table 1. participant Productivity and Cost Savings going from Instructor Led to a blended format.