




GUIDE TO
CHOOSING
THE RIGHT
LMS
FOR YOUR
ASSOCIATION



Investing in the *right* learning management system (LMS) sets a strong foundation for your association's continuing education and professional development efforts. This isn't just where learning opportunities live; it's also where you track your **members' progress and engagement** with your offerings. A strong LMS will benefit your organization for years to come and even grow with you — so it's important to make the right choice from the start.

In this guide, we're going to walk through five steps to take when investing in a new LMS:

- ▶ **Evaluate the basic needs of your association**
- ▶ **Define your priorities and narrow down solutions**
- ▶ **Consult with peers in your field**
- ▶ **Request a demo and evaluate the solution**
- ▶ **Invest with the future in mind**



Evaluate the basic needs of your association.

As you should with any large software investment, begin your LMS search with a basic evaluation of your association's needs.

The reason behind this is simple: different types of organizations will have different LMS needs. LMS providers know this and have developed specialized LMS solutions corresponding to these needs. There are LMSs for corporate training, LMSs for schools and higher education institutions, and LMSs for professional associations.

Choose an LMS that was purpose-built for associations similar to yours to ensure it has the basic functionality you seek from the start.

Define your priorities and narrow down solutions.

Once you've narrowed down LMS solutions by type, turn to your association's specific wants and needs. Even with a short list of providers, the various LMSs you're considering will likely still have a variety of individual functionality.

Choose a handful of priorities that will guide your association's decision to invest in an LMS. Then, list out the features that would fulfill those priorities. Some aspects to consider as you begin this prioritization are below.

Technical content requirements.

An LMS should support both your current and future learning delivery needs. To stay competitive and meet different member preferences, your LMS needs to cover a range of delivery methods, such as:

- ▶ On-demand learning
- ▶ Live online instruction
- ▶ Live in-person training
- ▶ Cohort based learning
- ▶ Blended learning

Ease of administration.

Online learning is likely just one task among many that your team is undertaking. If you're looking for an LMS that's simple to administer, seek out:

- ▶ Integrations with AMS, CRM, and webinar platforms
- ▶ Automatic data sync with integrated systems
- ▶ AI-powered workflows



Ease of navigation for learners.

If your learners are struggling to access or spend time in your LMS, it's unlikely they'll use it at all. To ensure your LMS is easy for learners to navigate, look for:

- ▶ An intuitive interface
- ▶ Multi-device accessibility
- ▶ White-labeled branding

Learner socialization.

Some associations prioritize networking as a core value, recognizing that community-driven learning offers immense value. Members seek out opportunities to connect with peers and often learn as much from each other as they do from experts. Online communities foster this valuable peer-to-peer exchange, which drives engagement and loyalty to your offering. If this describes your organization, you'll want to seek out features such as:

- ▶ Discussion boards
- ▶ Facilitated live chat
- ▶ Peer-to-peer feedback
- ▶ Gamification

Comprehensive data and metrics.

Data and insights can provide information about your association's members as they explore your education offerings, and trends on how well those offerings are delivering. You'll want to make sure your solution includes:

- ▶ Detailed reports on individual member activity (e.g., course progress, time spent, assessments),
- ▶ Comprehensive reporting and trends analysis
- ▶ Customized reporting & key metric tracking
- ▶ Links to other analytics software (ex: Google Analytics)



Specific credit tracking and reporting capabilities.

Many fields (such as the medical field) require specific certifications, and associations often serve as continuing education providers for these certifications. If you need to provide consistent, reliable credit tracking and reporting, seek out:

- ▶ Advanced CE credit management related to certification needs
- ▶ Internal and external credit tracking
- ▶ The ability to write credits back to your member database, AMS, or CRM

Advanced assessments and configurability.

Does your organization want to teach through testing? Or, maybe you offer test-prep for certifications? If so, here's what to look for in an LMS:

- ▶ Quickly make courses and assessments
- ▶ Assessments that change depending on how someone is performing
- ▶ Detailed and informative learner feedback options
- ▶ Ways to compare test results and analyze test questions

Marketing and monetization.

Non-dues revenue is crucial for any association, and online learning can be an reliable revenue stream for associations. If you're looking to capitalize on monetized learning, seek out solutions that offer:

- ▶ Personalized course recommendations
- ▶ Subscription and bundling functionality
- ▶ Digital and in-person course purchasing and registration



Ongoing support.

You specialize in running an association— not navigating comprehensive LMSs. If your team is new to administering continuing education programs or you're simply looking for more assistance with the effort, look for:

- ▶ Advanced configurability capabilities
- ▶ Reporting and data analytics services
- ▶ A dedicated customer success team

Identify a handful of priorities that your team is seeking and narrow down your list of potential LMS solutions based on the features needed to achieve your priorities. Then, move to the next step in this guide!



Consult with peers in your field.

First, speak with your association's greater network of peers. What systems do associations similar to yours use? Which platforms have made a positive impact on organizations with a similar makeup?

Beyond your personal network, turn to the providers of your top LMS contenders. These providers often maintain some sort of testimonials page; if so, check there first. However, if you're not able to easily locate testimonials on the provider's site, don't hesitate to ask for references.

There's also a decent chance your top providers have case studies and recommendations that they can share with you. For a less biased approach, read through popular technology review sites like G2 and Capterra to see what past and current users are saying in a non-moderated discussion.

When consulting peers and testimonials, here are a few key takeaways to note:

- What did the client note as the **benefits** of using that solution?
- What did the client note as **challenges** when using the solution?
- If you spotted a less-than-positive testimonial, how did the **provider handle** the conflict?

Discuss red flags with the LMS provider before making any investment decisions.



Request a demo and evaluate the solution.

This input from your peers should help you narrow your list of potential LMSs down to one or two. However, before investing in a solution, it's crucial that you test it out first.

Contact your top LMS candidates and **ask them for a demo** of the solution. Even better, ask for a sandbox to “play around in” yourself. When testing the platform for yourself, consider:

- How user-friendly is the solution for learners? For administrators?
- How easy is it to create courses and load content?
- If you are offering CE, does the LMS allow you to meet accreditor requirements?
- Does the LMS provide detailed reporting on individual members' course activities?
- Does the LMS provide aggregate data analytics to guide your learning programs strategically?

If you discover any challenges at this point in the process, discuss them with the solution provider. If it's a highly configurable system, it may be easy to resolve these pain points; but if not, it might be in your best interest to continue searching.

LMS grading evaluation

We've included a detailed grading matrix on the following page to support your evaluation of product demos. Here's how to optimize your use of the matrix:

- ▶ **Define requirements:** Before evaluating any LMS, clearly define your association's specific needs and priorities for a learning platform.
- ▶ **Gather information:** Research different LMS platforms and gather information through demos, trials, and vendor discussions.
- ▶ **Evaluate each platform:** Use the matrix to systematically evaluate each LMS based on the criteria. Assign a rating for each criterion based on how well the platform meets your needs.
- ▶ **Prioritize and select:** Weigh the importance of each criterion and use the ratings to compare platforms and make an informed decision.



Criteria	Rating Scale	Evaluation Considerations
Ease of Use (admin)	1-5 (1=Very Difficult, 5=Very Easy)	Intuitive interface for course creation and management; Streamlined user management; Efficient content uploading and organization; Clear reporting dashboard
Ease of Use (members)	1-5 (1=Very Difficult, 5=Very Easy)	Intuitive navigation and search functionality; Mobile-friendly access and responsiveness; Clear course progress tracking; Accessible on various devices
Community Management	1-5 (1=Basic, 5=Advanced)	Features for fostering peer-to-peer connections; Discussion forums, groups, and social learning tools; Tools for tracking member interactions and engagement; Support for creating micro-communities
Credit Management	1-5 (1=Basic, 5=Advanced)	Automated tracking and reporting of continuing education credits; Management of certifications and licenses; Compliance features
Reporting & Analytics	1-5 (1=Basic, 5=Advanced)	Detailed reporting on individual member activity; Aggregate data analytics for strategic insights; Tracking of key metrics (e.g., course completion, engagement); Tools for measuring community engagement and impact; Custom reporting
Customization Capabilities	1-5 (1=Limited, 5=Extensive)	Branding options to align with association's identity; Ability to tailor learning paths and experiences; Flexibility in content delivery formats; Personalization options for members
Integration Capabilities	1-5 (1=Limited, 5=Extensive)	Seamless integration with existing AMS or CRM; API availability for custom integrations; Ability to connect with other relevant platforms
Innovation	1-5 (1=Basic, 5=Highly Innovative)	Embracing new technologies like AI; Support for blended learning approaches; Features for creating immersive and engaging learning experiences; Commitment to ongoing development and improvement

Invest with the future in mind.

Last but certainly not least, consider your final LMS contender with your association's future in mind. There's no way to predict how your program may grow in the coming years, but you do want your LMS to be capable of growing with you.

Shopping for an LMS with the future in mind doesn't necessarily mean investing in a platform packed full of features your organization doesn't need. Highly robust systems cost more and will likely require a greater investment of time and other resources. Remember that LMS implementation is often a lengthy process, sometimes extending a year or more.

We recommend investing in a solution that's able to grow with your continuing education programming as needed. This comes down to the provider's commitment to innovation and their willingness to work with your team as new needs arise.

