

Request for Proposal

Learning Management System

CompanyX seeks offers to launch corporate training on a new learning management system (LMS). We would like to invite your company to participate in the selection process and to submit a proposal.

Project Summary

CompanyX is a lifestyle brand focused on the most awesome company mission ever! We serve direct to consumer sales through our website, companyx.com, and about 10 boutique retail store locations throughout the US. Additionally, we serve wholesale sales through major retail stores. CompanyX is currently experiencing substantial growth, especially in our direct to consumer channels, driving the goal to overhaul the customer experience through improved accuracy and consistency of information shared across all touchpoints. We view an LMS system as a critical tool towards achieving this goal in 2020. CompanyX currently has over 200 corporate employees.

Project Goals

Our goals with the LMS are:

1. Establish a platform to manage and maintain content and company knowledge
2. Create a “one-stop-shop” for learning and development to include role-specific learning paths and integrated content from outside sources
3. Develop consistency in the way content is created, managed, maintained, and delivered
4. Support modular content delivery that can be customized and scaled to multiple groups, including both internal and external end users
5. Provide a platform that encourages social learning through content generation, content sharing, commenting, and ratings
6. Provide a method to track, score, and report on learning progress and completion
7. Integration with both existing and future support systems such as HRIS and CRM/Ticketing
8. Create a formal process for linking learning objectives and performance to overall business objectives driving results related to business strategy

Key Requirements and Integrations

The desired LMS solution will include the following elements:

1. Integrations
 - a. HRIS – CompanyX currently does not have an HRIS, however uses PayrollZ for payroll and benefits administration, potentially changing providers in 2020. This integration will allow new hires to be added to the LMS automatically and assigned to the appropriate content and groups based on defined elements
 - b. CRM – CompanyX currently uses CRMz for helpdesk ticketing, changing to DeskY in the near future. This integration will allow for the LMS to be accessed through the CRM (either by way of iFrame or a tab/link within the tool) as well as implement context-sensitive content support and/or create scenario-based learning activities using real data from the CRM
 - c. LearningQ – CompanyX subscribes to LearningQ for all employees. Using the LMS, we expect to be able to access LearningQ content, incorporate LearningQ content into learning paths in the LMS, and keep a record of LearningQ course completions through users' training transcripts within the LMS.
2. Learner Experience
 - a. LMS will provide a responsive experience to accommodate for various access points (desktop, laptop, mobile device) or have a native mobile app available for iOS and Android that provides a seamless experience
 - b. Learner interface and experience will be support custom branding
 - c. Learner interface will be intuitive meaning content is easy to access, searching for content includes a search of content title, tags, and in-content text search, simple access to a training transcript, clear distinction between what is required learning and what is self-selected. Effort spent by end-users to learn navigation and basic functions should be minimal.
 - d. Social learning experience will allow for user-generated content (with moderation), commenting and/or rating of content, and the ability to share or suggest content to other users
3. Administration Experience
 - a. Administrator interface will be intuitive meaning course upload and maintenance process is simple, assessment creation via template with a wide range of question types (single select, multi-select, true/false, drag and drop, matching, hotspot), and user management options (group creation, management, content assignments, etc.) are readily available
 - b. Reporting will be available to people managers (for the team managed) and administrators and should be robust meaning a wide range of available standard reports as well as have the ability to export data to Excel or CSV

and/or the ability to build custom reports within the LMS that can be scheduled and delivered via email. Automatic API uploads to HRIS is a strong plus.

- c. Branding tools will be readily available including the ability to customize LMS color schemes, fonts, imagery, and upload a custom logo
 - d. LMS will accept the following file types at a minimum:
 - i. MP4, WAV and/or MP3, PNG and/or JPG, PDF, DOC, PPT, XLS, HTML and/or HTML5, and SCORM packages
 - e. LMS will allow for ILT and vILT courses to be added with a registration component for learners; ongoing or reoccurring sessions can be added through repetitive scheduling; recordings of vILT sessions will be added automatically or easily upon completion of the session
4. Content Authoring
- a. Content creation will be available to administrators and others as deemed necessary by permission levels
 - b. Content authoring tool will allow for the creation of engaging content through the use of video, text, images, outside embed codes, etc.
 - c. Scenario-Based Activities will be an available option via video and/or screen recording, audio recording, and/or file upload to be graded by managers and/or administrators using a defined rubric
 - d. If no in-platform authoring tool exists, demonstration or discussion of partnerships with common authoring tools is required
5. User Roles
- a. CompanyX has the expectation that managers will need to be in the system to provide feedback and access reporting for their team members; therefore, the following non-exclusive user roles are necessary:
 - i. Administrator – total system administration
 - ii. Manager – team view and reporting access
 - iii. Author – able to create/upload content
 - iv. Internal User – access to all content only, but no administration functions
 - v. External User – access to specific content assigned by user role
 - b. Role-based permissions need the ability to define internal (employee) vs. external (vendor, contractor, customer) learning groups to protect sensitive information
 - c. Learning content must be able to be created in assignable learning paths based on defined user roles
6. Technical Infrastructure
- a. SAAS cloud-based infrastructure with low latency and high availability
 - b. Support for SSO, username/password authentication, and IP whitelisting
 - c. Accessible to audiences worldwide

- d. Platform must be secure and encrypted to at least 128 SSL

Supplemental Information

As stated above in the Project Goals section, CompanyX is looking for a Learning Management System that meets the needs of the organization and provides the flexibility to grow and expand. We expect that proposals submitted to outline how CompanyX can use the tool to accomplish the outlined goals as well as plan for the future. Currently, there is no system through which content is consistently managed, so there will not be a need to import any existing content.

Project Contact

The project lead from CompanyX is Mel Buyers, Senior Manager of Learning Design & Content Development. Feel free to contact Mel if you need additional information or have questions about the project.

Phone: 111-111-1111 Email: melbuyers@companyx.com

Anticipated Selection Schedule

The schedule outlined below is the tentative schedule as determined by CompanyX. Dates below are subject to change. Any change in schedule will be communicated to eligible providers.

Date(s)	Deliverable
July 23 rd	Request for Proposal sent to pre-screened providers
July 27 th	Deadline for providers to submit questions to CompanyX
August 2 nd	Deadline for CompanyX to respond to provider questions
August 11 th	Completed RFP form (see below) due to CompanyX
August 25 th	Selection of Top 3 providers & notification to unsuccessful providers
August 25 th	Request from selected providers to schedule 2-hour demonstrations
September 4 th – September 8 th	Selected provider demonstrations take place
September 11 th	Begin negotiations with Top 2 providers & notification to unsuccessful providers
September 15 th	Final decision and notification to unsuccessful providers

CompanyX has the expectation of starting full-scale corporate training using the LMS by January 1, 2020; therefore, need to have an operating LMS in place by September 29, 2019 to begin populating content and constructing learning paths.

Evaluation Criteria

Each provider will be evaluated by the key stakeholders at CompanyX and rated on a 1-10 scale in the following areas:

1. Articulation of expertise in working with similar customers
2. Demonstration of a platform that addresses each of the key requirements and integrations outlined above
3. Explanation of competitive differentiators related to the needs of CompanyX
4. Discussion of learner engagement techniques supported by the platform with examples of success (actual data is always appreciated)
5. Delivery of a thorough product roadmap outlining plans for improvement and enhancement over the next 12 months
6. Development of a successful implementation timeline and plan and/or process
7. Competitive pricing for services provided

Supplemental Information – Use Case Statements

The statements below serve as a general idea of how the system should function given a specific task to perform. The Use Case Diagram table details which roles will perform each task.

Use Case Diagram

	L&D	HR	People Managers	SMEs	Internal User	External User	HRIS
System Administration	X						
Manage Users	X	X					X
Manage Groups	X	X					X
Author Content	X			X			
Create Classes	X	X					
Create Reports	X	X					
Record Attendance	X	X					
Approve Content	X						
View Reporting	X	X	X				X
Conduct Classes	X	X					
Review Content	X	X		X			
Rate Content	X				X	X	
Participate in Discussions	X	X	X	X	X	X	
Share Content	X	X	X	X	X		
Enroll Others in Classes	X	X	X				
Enroll in Classes	X				X		
Launch Content	X				X	X	

Use Case Statements

Manage Users & Groups – Administrator & HRIS

1. HRIS sends a nightly feed to LMS updating personnel records for new hires, role changes, terminations, etc.
2. System accepts file and updates user groups, roles, permissions, as appropriate
3. Administrator creates non-role based groups and adds users as necessary

Creating Content – Create New

1. The administrator clicks a Create/Add button
2. System presents option to Upload or Create New
3. Administrator clicks Create New
4. Administrator creates modular content by:
 - a. Copy/Pasting content from another source
 - b. Uploading audio and/or video
 - c. Inserting hyperlinks or images
 - d. Creating assignments and/or assessments
5. Administrator styles content based on pre-defined style guide
6. Administrator proofreads and approves content
7. Administrator clicks Save or Publish button
8. System saves content
9. System makes content available for selection in the creation of learning paths

Creating Content – Upload

1. The administrator clicks a Create/Add button
2. System presents option to Upload or Create New
3. Administrator clicks Upload
4. Administrator selects .zip file from device or cloud location
5. Administrator clicks Upload button
6. System unpacks content
7. System saves content
8. System makes content available for selection in the creation of learning paths

Create Classes or Events – Creation and Self-Registration

1. Administrator clicks “New Event” or “Add Event” button
2. System displays screen with relevant details for event

3. Administrator completes New Event form including date, time, location, registration cap, registration deadline, waitlist information, etc.
4. System generates registration link and displays event on event calendar
5. Administrator adds users or groups to the event
6. System delivers event registration notification to assigned users or groups
7. Users click “Register Now” button in email notification
8. System displays registration form
9. User completes form and clicks “Submit” or “Register” button
10. System delivers confirmation notification with calendar invite attached

Create Reports – New Report

1. Administrator accesses the reporting section of the system
2. The system displays a list of pre-built reports and a New Report button
3. Administrator clicks New Report button
4. Administrator selects desired fields from all available data fields
5. Administrator arranges data fields in the desired column order using drag and drop functionality
6. Administrator clicks Run or Generate Report button
7. System generates report based on selected data fields
8. Administrator filters new report based on selected data fields
9. Administrator saves and/or schedules newly generated report to run on specific schedule including emailing the report to selected users with “View Reporting” permissions

Record Event Attendance – Live, In-Person or Virtual Event (Spreadsheet Method)

1. Instructor collects attendance via spreadsheet during event and submits it to Administrator upon completion of the event
2. Administrator locates event in LMS and clicks “Enter Attendance”
3. System prompts Administrator for spreadsheet upload or lists participants with checkboxes to complete attendance
4. Administrator uploads spreadsheet or manually checks off those who were in attendance, then clicks the “Submit” button.
5. System adds completion of event to users’ history reports

Record Event Attendance – Live, In-Person or Virtual Event (QR Code Method)

1. Instructor displays QR code at the end of the event
2. Users log into LMS and access event (or click a link in calendar invite) via mobile device

3. Users click “Scan or Enter Code” button
4. Users either Scan the QR code with their mobile device or type in a unique completion code and click “Submit”
5. System tracks completion and adds event to users’ history reports

View Reporting – Managers Viewing Team’s Reporting

1. Manager clicks on “Reporting” section
2. System displays two options – “My Learning” or “My Team’s Learning”
3. Manager clicks “My Team’s Learning” button or link
4. System displays Manager’s team members with filters to add or remove team member data
5. Manager adjusts filters
6. System updates data to correspond to selected filters (course, curriculum, path, etc.)
7. Manager may choose to export data to CSV

View Reporting – Users

1. Users click “My Learning” button or link to view their personal learning transcript for a defined period of time that can be adjusted to display full history
2. System displays transcript based on user’s selection criteria

View Reporting – HRIS Integration

1. System sends training transcript data to HRIS on a routine basis
2. HRIS accepts data and combines the information with the user’s personnel file

Share and Rate Content

1. User completes content successfully
2. System displays a simple “thumbs up or thumbs down” rating asking if the user was satisfied with the content
3. User makes a selection
4. System displays feedback box for user to leave qualitative comments
5. User enters comments and clicks “Submit” button
6. System displays message of thanks and options to send a note to co-workers
7. User clicks “Share Now” button
8. System displays an email template dialog box
9. User customizes message with receiver’s name, email address, and a personal message and clicks “Send”
10. System sends email to recipient with deep link to content

Participate in Discussions

1. Upon completion of content, system displays a comment box for users to enter questions or comments about specific content and can @mention specific people for their input
2. System sends email notifications to content owners (as determined during content building) as well as anyone @mentioned in the comment
3. Content owner and/or SMEs or @mentions click a link in the email notification to respond to the comment
4. Original commenter receives a notification when comments are made

Enroll Others in Classes or Events – Manager Task

1. Manager views event calendar and clicks desired event
2. System displays registration options – “Register Self” or “Register Team Member(s)”
3. Manager clicks “Register Team Member(s)”
4. System displays list of users in manager’s reporting structure
5. Manager selects users from list and clicks “Register”
6. System displays summary of registrations – includes people, event, date/time, location
7. System sends email notification to registered users with language stating something like, “Your manager has registered you for an upcoming event.” Email contains calendar invite and details of event.

Launch Content – Internal User

1. The user accesses the system
2. The user has an option to view required courses or search for optional content
3. The user clicks to view required courses
4. The system displays all required courses default sorted by due date
5. The user chooses to change the sort order or click into a course
6. The user launches a course from the required course view

Launch Content – External User

1. The user accesses the system
2. The system displays all required courses default sorted by due date
3. The user chooses to change the sort order or click into a course
4. The user launches a course from the required course view

Provider Response

In the sections below, please provide your response and submit it via email to Mel Buyers (melbuyers@companyx.com) by the deadline. In your email response, please include available dates and times during the week indicated for a 1 – 2 hour demonstration.

Proposal Summary

About <Provider>

About <Platform>

Specific Learner Engagement Strategy

Description of Compliance with Requested Functionality

Implementation Plan and Timeline

Project Cost and Anticipated Ongoing Costs

<Provider> 12 Month Roadmap

References