

# Welcome to Your Buyer's Guide for Employee Development

Whether you're evaluating a learning platform for the first time or reevaluating your current learning ecosystem, it's essential to involve a range of stakeholders in the process. Input from your organization's administrators, leadership, facilitators and learners will help ensure the platform you choose will best meet everyone's requirements. A thoughtful evaluation process not only helps identify the right learning platform but also sets the foundation for long-term success with your chosen vendor.

We created this buyer's guide to help you through the selection process.

## About This Buyer's Guide

This guide outlines key aspects and characteristics of learning platforms to help you choose a system that aligns with your organization's learning goals and objectives. Ultimately, you're looking for a solution that delivers the best learning experience possible for everyone involved.

Your organization can benefit from a proven, reliable platform with robust features—one that can easily manage content, support both on-demand and live learning, track individual and team progress, and integrate seamlessly with your existing technologies. Just as important is the vendor and partner relationship, which can provide the ongoing support and collaboration needed to help your organization get the most out of the learning platform.

By the end of this guide, you'll be equipped to confidently evaluate learning platform options and choose a platform that's the right fit for your organization.



# What to Look for in a Platorm:

Choosing the right platform means finding a solution that not only meets your technical requirements but also supports meaningful learning experiences. As you evaluate your options, consider the following features and capabilities that can help your organization deliver impactful, efficient and engaging learning.

#### **USER EXPERIENCE & ENGAGEMENT**

- Intuitive, easy-to-use interface.
- Personalization options to tailor the experience.
- Interactive content and activities that build and strengthen real-world skills.

#### **CONTENT CAPABILITIES**

- Tools for content creation and curation.
- Advanced video capabilities to support rich media learning.

#### **INTELLIGENT FEATURES**

- Robust AI tools to enhance learning and efficiency.
- Comprehensive assessment features.

#### **OPERATIONAL EFFICIENCY**

- Time-saving administrative tools to automate and streamline workflows.
- Strong data analytics and reporting to track progress, outcomes and impact.

#### **TECHNOLOGY ECOSYSTEM**

• Frictionless integration with existing technologies.

#### **VENDOR RELATIONSHIP**

 Ongoing, reliable partnership with a vendor who offers responsive service and support.



# Setting the Stage for an Effective Evaluation

Before comparing platforms and vendors, it's important to lay the groundwork for a successful evaluation. Taking time to understand your stakeholders, clarify your organization's needs, and plan for implementation and communication will help ensure your process is thoughtful, inclusive and aligned with your goals. The following steps can help guide your team through a well-rounded evaluation.

### 1. Assemble Your Evaluation Committee

A successful evaluation starts with the right team. To ensure the platform meets the needs of all users and sponsors, bring together a cross-functional team that represents a range of perspectives and responsibilities.

Look beyond your immediate team and consider involving stakeholders from departments like IT, sales, and customer experience—any group that could benefit from or contribute to the learning platform. These broader perspectives not only strengthen your evaluation but may also reveal shared goals and overlapping needs.

In some cases, peers in other departments may already have budget allocated for tools or initiatives that align with your learning platform objectives. By identifying these opportunities early, you can:

- Pool resources and consolidate budgets
- Strengthen your case for investment
- Reduce technology overlap across teams

Your evaluation committee might include:

- Executive sponsors
- Trainers and instructional designers
- · Learning operations and administrators
- IT teams
- Support personnel

Try to include team members who bring both technical and non-technical perspectives—and who are genuinely invested in the success of the evaluation process.



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# 2. Survey Your Stakeholders

With your evaluation committee in place, the next step is to gather input from the broader stakeholder group. Their insights will help shape your requirements and ensure the platform supports real-world needs across your organization.

To keep the feedback meaningful and focused, aim to collect a manageable number of responses—20 to 25 is typically a good target. Include a mix of structured and open-ended questions to gather both measurable feedback and personal insights. This helps you spot patterns while also giving stakeholders room to share ideas, concerns or opportunities.



Here are some sample questions to guide your stakeholder survey:

#### **GENERAL NEEDS AND EXPECTATIONS**

- What are your primary goals for using a learning platform?
- What challenges do you currently face with learning or facilitation delivery?
- What day-to-day challenges could an learning plaform help address?

#### **CONTENT AND ENGAGEMENT**

- What types of content do you find most engaging (e.g., videos, interactive materials, real-world scenarios)?
- How important is personalization in your learning experience?

#### **USER EXPERIENCE**

- What do you expect for the learning platforms interface in terms of ease of use?
- What accessibility or usability considerations must be considered?

#### **ASSESSMENT AND FEEDBACK**

- What types of assessments or feedback are most valuable to you?
- How do you want to be able to track progress and performance?

#### SUPPORT AND COMMUNICATION

- What kind of support or communication would you need to feel confident in using the learning platform?
- How would you prefer to receive updates or training about the new learning platform?

# 3. Engage the People Who Will Engage With the Learning Platform

As you review stakeholder feedback, make sure you're focusing on the needs of the people who will be using the learning platform every day—especially those creating and consuming the content. This input will be essential, as their day-to-day experiences and challenges should directly inform your platform requirements.

These individuals will also help guide the final decision, whether they're part of the steering committee or simply influential voices in the process.

Pay close attention to the perspectives of:

- Employees
- Managers
- Trainers and facilitators
- Administrators
- Instructional designers
- Executives

By understanding their unique needs and priorities, you'll be better equipped to choose a platform that delivers meaningful impact across your organization.



## 4. Define Your Timelines

With your stakeholders engaged and your needs clearly outlined, it's time to map out the path forward. A clear timeline will help keep the project on track and ensure everyone is aligned with key milestones.

Start by identifying your target go-live date, then build a workback schedule that outlines the major phases of the project—from vendor review to learning platform selection to implementation, training and launch. This approach helps set realistic expectations and gives your team a shared view of what's ahead.

#### SAMPLE WORKBACK SCHEDULE

Note: Adjust the workback schedule according to your organization's size, complexity and needs.

Month 2 —

Month 3

Month 1

Month 4 —

#### Learning Platform Workback Schedule

PHASE	TIMELINE	KEY ACTIVITIES
Project Kickoff	Month 1	Finalize evaluation committee, align on goals and scope
Stakeholder Engagement	Month 1–2	Conduct surveys, gather feedback, define requirements
Vendor Review & Demos	Month 3–4	Shortlist vendors, schedule demos, evaluate platforms
Vendor Selection	Month 5	Final decision, contract negotiation, onboarding planning
Implementation Planning	Month 5–6	Define implementation milestones, assign roles, prep data
Platform Configuration	Month 6	Set up environment, configure features, test integrations
Training & Communication	Month 7	Train admins and facilitators, communicate rollout plan
Go-Live	Month 8	Launch, monitor adoption, provide support

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## 5. Articulate Your Needs and Requirements

With your timeline in place, the next step is to get clear on what success looks like. Defining your goals and requirements upfront helps guide your team's efforts and ensures everyone is working toward the same outcomes.

Make the high-level goals of the evaluation project clear in regards to what you want your project team to do. Then, review these goals once your project team is in place so that everyone understands their mission and purpose.



Here are some examples of actionable goals to consider:

- Align our learning platform with strategic business goals by selecting a solution that drives measurable impact and supports long-term growth.
- 2. Implement a comprehensive learning platform that delivers the flexibility, depth and capability our employees and administrators need to succeed.
- Adopt a modern, user-friendly learning platform that encourages full engagement from both employees and learning staff.
- Invest in a scalable learning platform that can grow with our organization and meet future learning demands with confidence.
- 5. Choose an adaptive learning platform that accommodates diverse user needs and provides deep analytics for informed decision making.
- 6. Maximize ROI from our learning technology by selecting an learning platform that delivers measurable results and supports performance improvement.
- 7. Increase adoption rates by deploying an intuitive, engaging learning platform that learners find easy to use and valuable.
- 8. Improve completion rates with an learning platform that tracks key metrics and supports learners throughout their journey.
- 9. Explore agile, future-ready learning platform options ensuring alignment with evolving needs.
- 10. Ensure mobile accessibility by selecting an learning platform with a fully responsive design that supports learning anytime, anywhere.
- 11. Develop a structured demonstration rubric to guide vendors in showcasing how their platform meets your specific needs—ensuring a focused, efficient evaluation process that highlights relevant capabilities.

# 6. Best Practices for Communicating the Change

Selecting the right learning platform starts and ends with meeting the needs of your organization's people—which is why it's essential to keep them informed, engaged and excited at every stage of the process.

Here are a few strategies to help you build awareness, excitement and trust:

- Clarify the value for each stakeholder group
   Make sure your stakeholders understand what's in
   it for them—whether it's making their jobs easier,
   improving the learning experience or unlocking
   access to new and better tools.
- Use a multi-channel communication strategy Share updates consistently through a variety of internal channels like email, intranet and social media platforms to reach people where they are.
- Activate internal advocates
   Identify and empower champions who are enthusiastic about the new learning platform.
   Their influence can help build momentum and encourage adoption.
- Provide accessible, timely training
   Offer a mix of on-demand resources, live sessions
   and tailored materials to ensure everyone has what
   they need to succeed.
- Stay tuned in to on-the-ground feedback
   Use pulse surveys, open Q&A sessions, or offer
   dedicated chat channels for people to share their
   thoughts and to ask questions in real time.

Choosing and implementing a new learning platform should be a collaborative process—one that reflects the needs of your stakeholders, keeps them informed and engaged, and drives adoption and growth long after launch.

# Selecting the Right Learning Platform

What to Look for: Features and Capabilities

#### **CONTENT CREATION AND CURATION**

The ability to create and curate custom learning content is essential for organizations of all types and sizes. Learning platforms vary widely in the tools they offer—some support only basic file uploads (DOC, XLS, PPT, PDF, TXT, RTF), while others enable richer content experiences, including embedded links, videos and full course packages. Choosing a platform with flexible content capabilities ensures your learning programs can evolve and scale with your needs.

Administrative capabilities are often where facilitators and administrators notice the greatest differences between learning platforms. Some systems offer a full suite of tools for data management, reporting and user oversight, while others provide only limited access to these functions. Content creation and management interfaces can vary widely—some platforms feature intuitive drag-and-drop tools, while others may require knowledge of HTML or CSS coding to build and organize learning materials.

Many organizations need a platform with strong content creation capabilities—including support for video, audio, gamification and access to expansive online learning libraries. Choosing a platform that offers both control and flexibility is key to building a learning experience that can grow and evolve with your organization.









Before choosing, consider answering the following questions:

- Can you upload all your existing assets, including videos and assessments?
- Does it offer an embedded content builder to develop course content from scratch?
- Can content managers organize curriculum, learning materials and evaluations into an effective and meaningful learning pathway?
- Does the platform include generative AI tools to support efficient and scalable content creation?
- Can learners easily locate and access materials from different learning pathways and coursework?
- Can learners connect to external web-hosted content when needed?
- Does the vendor offer integration with—or access to—a content library of off-the-shelf learning materials?
- Does the platform support the latest international standards for online learning, including SCORM, AICC, IMS and Tin Can/xAPI?

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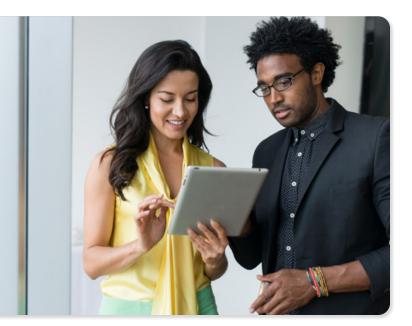
#### **USER EXPERIENCE**

Understanding how different users—including instructors, administrators and learners—interact with the learning platform is essential. A platform that's intuitive and accessible helps drive adoption, engagement and long-term success.

When reviewing user experience features, look for:

- Easy navigation between learning modules and activities
- Responsive design that works seamlessly across devices
- Accessible multimedia and instructional content
- Custom branding options, including logos and color schemes
- Clean, intuitive interface that supports a smooth learning experience
- Mobile-friendly capabilities for learning on the go

Your learning platform should offer a sleek, engaging interface with customizable features and controls that make learning smooth and enjoyable for everyone.





#### **EASE OF USE AND ACCESSIBILITY**

Ease of use and accessibility are essential for every learner. The right learning platform should make it simple for your organization to create content that is engaging and accessible.

Questions to consider:

- Can learners easily customize their preferences to suit their needs?
- Can you present material through different formats and mediums?
- Can learners interact with content and respond in a variety of ways?
- Is the platform compliant with Web Content Accessibility Guidelines 2.1 Level AAA standards?
- Are there built-in features or tools that help make your content more accessible?

Accessibility-related features aren't just for users with long-term disabilities—they also support those with temporary or situational needs. Prioritizing accessibility helps create a more inclusive and flexible environment for all. For example, someone in a noisy space might rely on closed captions and appreciate having a transcript to review later. A learner who prefers to express themselves verbally might benefit from the option to submit a video or audio response.

At the end of the day, it's about making sure all users have a variety of ways to consume content, demonstrate their knowledge and skills and actively engage and collaborate.

Remember, accessibility compliance isn't just a nice-to-have—it's essential. In many cases, it's also a legal requirement.



#### PERSONALIZATION (ROLE-BASED LEARNING)

The ability to personalize the learning experience can make a big difference in user satisfaction and the long-term success of your programs. When learners can set preferences based on their interests, goals and learning styles, they become more invested—and more likely to stay engaged.

To encourage wider adoption, a platform should include built-in features that recommend content based on a learner's interests and interactions. As learners move through the platform, the experience should become more intuitive—guiding them toward tailored pathways and unlocking relevant, engaging content and activities. If there's something they want to explore further, they should be able to easily search for and register in courses that match their interests.

When an learning platform adapts to the learner, it fosters deeper engagement and helps drive meaningful outcomes—for both individuals and the organization.

User-driven personalization features may include:

- Adjustable color palettes for menus and sidebars
- Customizable dashboards with both day and nightvision options
- · Personalized feeds, notifications and nudges
- Multi-language interaction and support

Even small touches—like the ability to set pronoun preferences or choose distinct avatars—can make the experience feel more engaging, enjoyable and personalized over time.



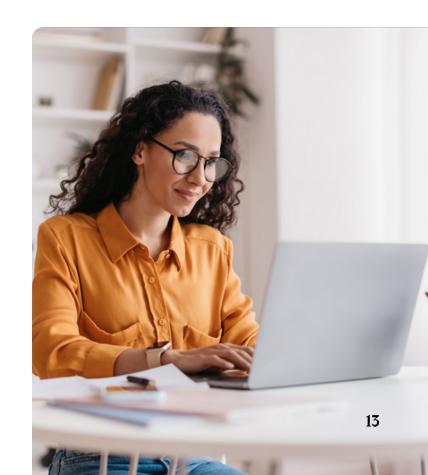
#### **SKILL BUILDING**

The right learning platform should help learners master new skills and upgrade existing ones by supporting the creation and management of resources designed to help them internalize concepts quickly and effectively.

Look for a platform that enables skill building through:

- Administering awards, badges and certifications
- Facilitating social learning opportunities with peers
- Delivering interactive content
- Supporting hands-on, practical activities
- Offering flexible, meaningful assessment options
- Providing Al-powered coaching and study support

Together, these features create a dynamic learning environment that supports active skill building. By offering a mix of encouragement, collaboration, interactivity and personalized support, learners stay motivated, build confidence and achieve meaningful outcomes—both during training and beyond.





#### SYSTEM SECURITY AND ADMINISTRATION

While data analytics provide valuable insights, the administrative backbone of your learning platform ensures that the system remains secure, stable and well-managed. A strong administrative foundation is essential for protecting your content.

Cloud-based learning platforms play a critical role in defending against breaches and cyber threats. Look for vendors that offer built-in safety features such as:

- Secure data transmission
- Network protection
- Endpoint threat detection
- Single sign-on (SSO)
- Expert vulnerability management

These safeguards help ensure your platform remains a safe and reliable environment for learners and administrators alike.

As you evaluate vendors, it's important to understand how well their systems are managed and maintained, asking questions like:

- Do you offer constant uptime?
- What's your disaster recovery plan?
- What security policies does your organization have in place?
- Will maintenance windows make the learning platform unavailable for use?

User management capabilities can vary widely across platforms, so look for a learning platform that can do the work for you—automating tasks like user creation and enrollment—while offering features like self-registration, catalog features and bulk user management.



#### **DATA ANALYTICS**

Data and analytics can be powerful tools for learning professionals. When evaluating options, look for platforms that offer detailed insights into adoption, engagement and learner performance—along with reporting features that make it easy to compile quick evaluations.

Consider the following functionalities:

- A robust report-building engine
- Seamless integration with third-party data sources
- Intuitive dashboards that make key metrics easy to access and understand

These features help learning professionals track progress, measure impact and make informed decisions that support continuous improvement.



#### **INTEGRATIONS**

Once your learning platform is secure and well-managed, the next consideration is how well it integrates with the rest of your organization's tech stack. Your platform should work seamlessly with the tools your teams already use. For example, some platforms offer easy integration with HR systems and business intelligence tools—allowing learners to search for courses based on their roles or areas of interest.

Always remember that your learning platform needs to address the needs of two different audiences: Learners and instructors. Each group's preferences and requirements must be balanced. Otherwise, you may end up with a platform that's too complex for administrators to manage or too difficult for learners to use. Integration plays a key role in ensuring both groups can navigate the system effectively and get the most out of it.

## Implementation and Training

When it comes to implementation, you want a plan that's customized to reflect your needs—and a partner who can help with the heavy lifting. This includes tasks like course migrations and SSO setup.

Training should help your educators and administrators get up to speed quickly through on-demand content, individualized plans and personalized support for specific skills.

Effective implementation and training ensure your teams are equipped to use the learning platform confidently and efficiently—right from day one.

## **Learning Strategy**

Whether you're building from the ground up or migrating from one learning platform to another, making the transition can be challenging.

Support in the following areas can help ease the process and set you up for success:

- · Strategic planning
- · Change management
- · Communications and marketing
- Learning program design
- Learner experience mapping
- Measurement and evaluation

The right strategy can give you the support you need to understand your learning goals and effectively launch your learning programs. Together, a clear strategy and strong support create the foundation for long-term impact and continuous improvement.

# Content Development and Design

Creating impactful learning experiences is about more than simply having great material. Content needs to be well-structured and presented in interactive, accessible ways—incorporating proven best practices and giving your teams the knowledge and tools they need to drive adoption, engagement and retention.

When evaluating vendors ask about instructional design supports and capabilities:

- Do they have an in-house instructional designer or team with the bandwidth to take on course development?
- Can their team build different types of learning experiences—whether asynchronous, synchronous or a blend of both?
- Will the content be accessible for all learners?
- Will the templates be easy for your internal course creators to reuse and adapt?
- Can they create custom-branded elements, including widgets and badges?

It's also important to be able to tailor the type of support you receive. In some cases, you may need one-time help to upgrade an existing course. In others, you may want ongoing access to dedicated experts who can help keep your content fresh, engaging and aligned with your evolving goals.

# Support and Consulting

You need vendor that's ready to help simplify day-to-day management and optimize how the platform is used across your organization.

A trusted partner brings more than technical support. They offer strategic guidance, share best practices and help you adapt your learning programs as your needs evolve. This kind of relationship can make a meaningful difference—especially when you're scaling programs, navigating change or trying to drive long-term impact.

Look for a vendor that's invested in your success and ready to collaborate with you at every stage—from implementation to optimization.

Find a partner in your vendor who can:

- Offer ongoing assistance with key administration tasks
- Provide technical guidance for updates and projects
- Help you get more out of your learning data and analytics with customized reports and visualizations
- Deliver end-user support to help lessen the load on your staff

Whether you're new to online learning or a long-time user, the services and support your vendor provides should enable success at every step—from onboarding to adoption and beyond.



# Questions to Ask When Evaluating an Learning Platform Vendor

As you research vendors, it's important to evaluate them across several key areas to ensure they're a reliable, long-term partner.

#### Investigate the following:

- Financial health and stability
- Company history and longevity
- Customer retention and churn rates
- Executive team stability and capability
- Thought leadership in the learning space
- Innovation, R&D investment and product roadmap
- Expertise with implementation, course conversion and support
- Commitment to long-term partnership

These questions can help you assess not just the platform, but the strength and reliability of the team behind it.

#### **ABOUT THE VENDOR: QUESTIONS TO ASK**

These questions can help you assess key criteria like stability, innovation and long-term partnership potential:

- How long has your company been providing a learning plaform?
- · What additional services does your company offer?
- Is it likely that your company will continue releasing new features regularly? How will those features be delivered to customers? Will the platform experience any downtime during upgrades?
- What makes your platform stand out from competitors?



#### **ABOUT THE PLATFORM: QUESTIONS TO ASK**

These questions can help you assess how well the learning platform supports usability, accessibility and administrative efficiency:

- How can your platform help reduce administrative burdens by building better product knowledge?
- How can I create a continuous user experience with a cohesive look and feel, so learners don't feel like they're hopping between learning platforms?
- Will my learners be able to access courses anytime, anywhere and on any device—even offline?
- How do I control who has access to content and permissions?

#### ABOUT THE PARTNERSHIP: QUESTIONS TO ASK

These questions can help you evaluate whether a vendor is positioned to support your long-term success:

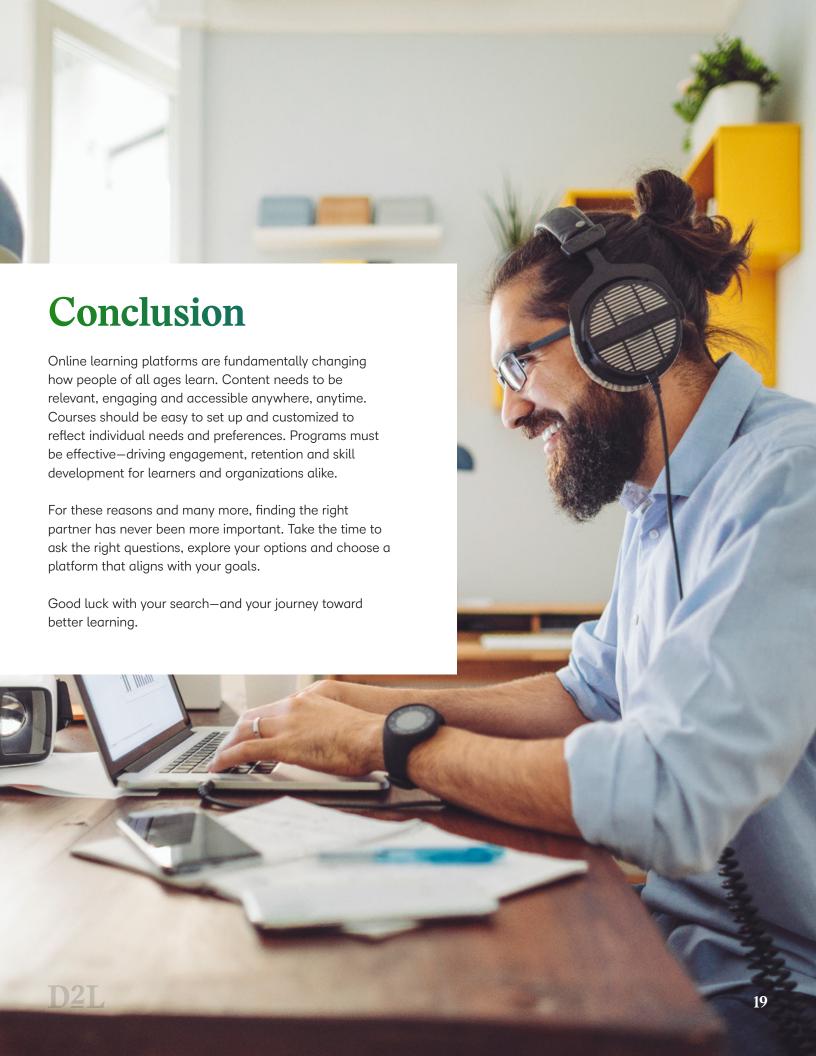
- Does your company provide guidance on how to improve my programs to make them more effective?
- Will the platform be able to cater to diverse learning preferences and needs?
- How can I measure the impact of my programs?
   What types of metrics and reporting features will be available?
- Will the platform be scalable? Are there additional charges involved?
- Can your platform integrate with other systems so I can run additional reports?

#### WHY ASKING THESE QUESTIONS MATTER

Choosing the right platform means looking beyond features and functionality. The questions outlined across vendor, platform and partnership considerations help you evaluate the full picture—ensuring the learning platform is backed by a stable, innovative organization, designed to support usability and accessibility, and capable of growing with your needs.

A trusted vendor isn't just a provider—they're a partner, an extension of your organization. By asking the right questions, you can find a solution that aligns with your goals today and supports your long-term success.





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#### **ABOUT D2L**

D2L is a global learning innovation company, reshaping the future of education and work. We're leading the way into a new era of personalized learning, driven by the belief that everyone deserves access to high-quality education, regardless of their age, ability or location. Our signature technology product D2L Brightspace enhances the learning experience for millions of learners at every stage of life, from the earliest days of school to the working world.

Learn more at D2L.com.



## **GLOBAL HEADQUARTERS**

151 Charles Street West, Suite 400 Kitchener, ON, Canada N2G 1H6

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