

Training Challenges Survey Series

#3 – LMS Consolidation

December 5, 2006

LMS Consolidation Survey Results

The third survey in the Training Challenges Survey Series, conducted by Expertus and TrainingOutsourcing.com, focused on LMS consolidation – defined as the tendency of organizations using more than one learning management system to standardize on a single system.

The survey was launched in October. As of October 30, 249 survey responses had been received. Approximately 34% of respondents were from companies with more than 5,000 employees; 24% were from companies with 1,000 to 5,000 employees, and about 42% of respondents were from companies with fewer than 1,000 employees

Survey Highlights

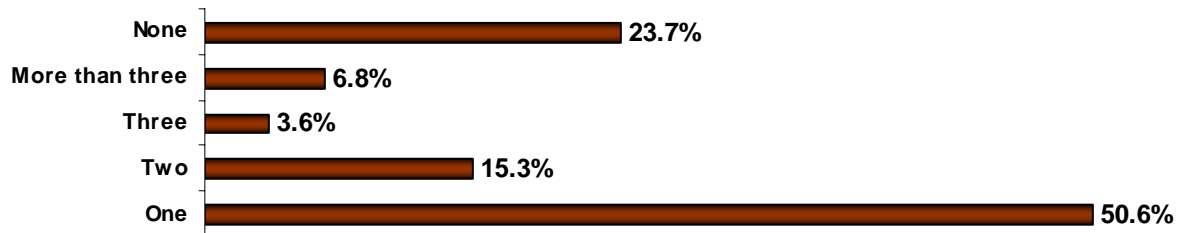
- The survey verified that LMS consolidation is indeed a significant trend in enterprise learning. More than 25% of the survey's respondents currently used multiple LMSs within their organizations. Of these, more than 75% said they plan to consolidate systems, and more than 75% plan to perform this consolidation within the next year.
- As part of the consolidation process, 40% of respondents say they plan on purchasing and implementing a new LMS; 35.6% say they will make major upgrades to an existing LMS during consolidation.
- The top factors cited as driving the need to consolidate are the centralization of learner data (77.8%), improved reporting (68.9%), improved content integration (64.4%) and improved integration with other enterprise applications (62.2%). Rather surprisingly, only 40% of respondents cited reduction of technology costs as a business driver.
- More than 10% of survey respondents had three or more operating LMSs in their organizations.
- 46.7% of respondents estimated that consolidation would take six months to one year; 22.2% estimated consolidation projects would take from one to two years.
- Almost 40% of respondents anticipated using outside services for help with consolidation projects.
- The biggest challenges anticipated by respondents were data issues (58.7%), technology (56.5%), and user acceptance and customization (both at 43.5%).
- Almost half of consolidation projects are driven by training organizations.

LMS Consolidation Survey

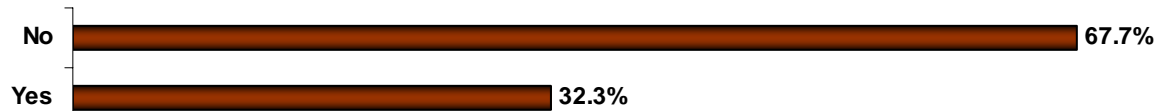
1. Has your organization implemented more than one learning management system (LMS)?



2. How many are currently in use?



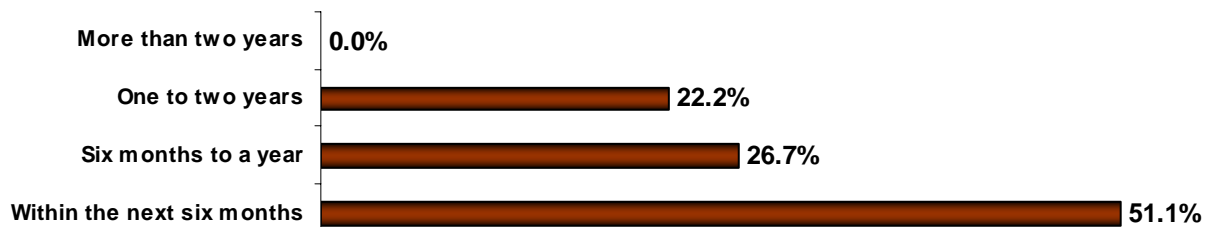
3. Do you have any plans to replace any of your existing LMSs within the next two years?



4. Do you have plans to consolidate and reduce the number of LMSs in use?

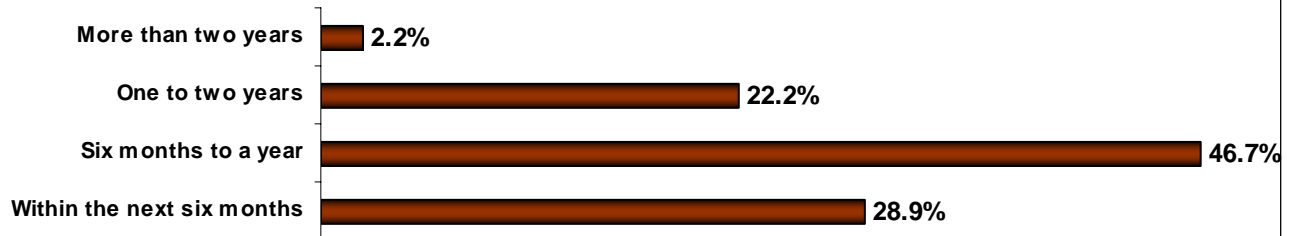


5. When do you plan to begin the consolidation?

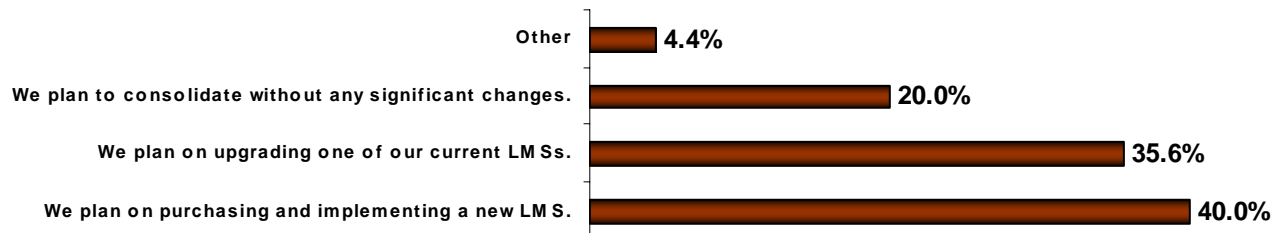


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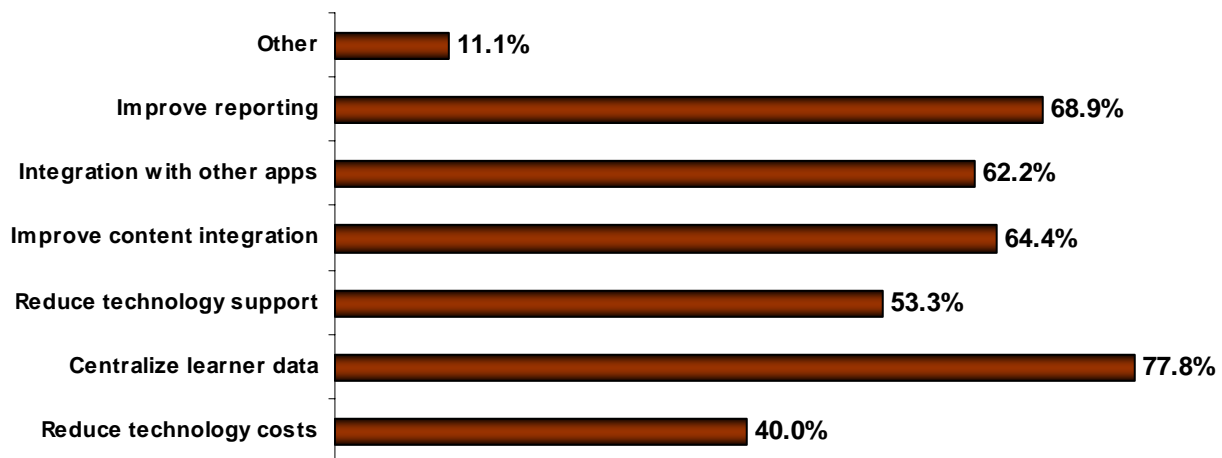
6. How long do you expect the consolidation to take?



7. Do your consolidation plans include purchasing a new LMS or making a major upgrade of an existing LMS?



8. What are the drivers behind the decision to consolidate LMSs?

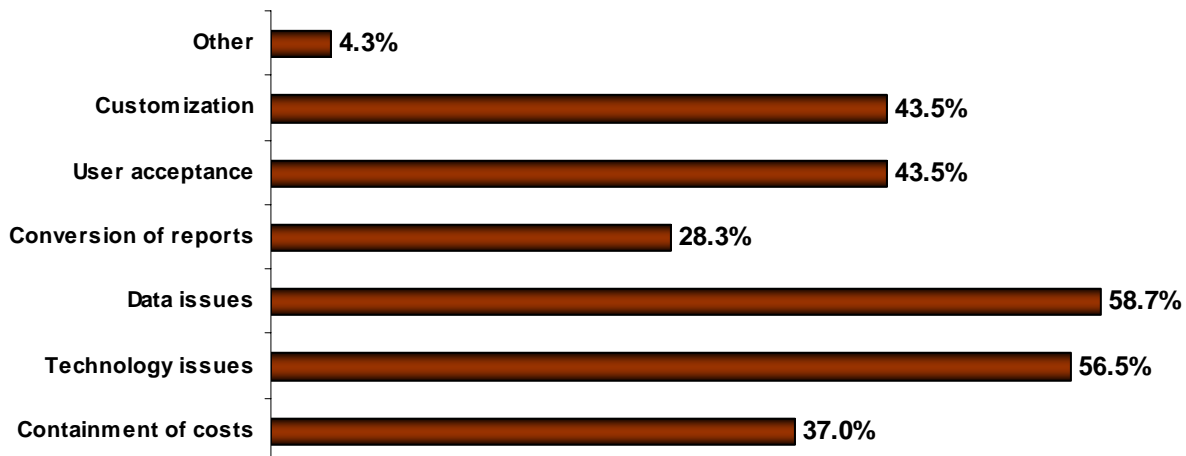


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9. Do you plan to get outside help to assist with the consolidation process?



10. What do you think will be the three biggest challenges for consolidation?



11. What internal department has responsibility for the consolidation process?

