



A leadership tool to evaluate LMS readiness, vendor fit, and implementation risk.

Executive LMS Fit Evaluation

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Purpose of this guide: An LMS is not a content library; it is an operational infrastructure. If training is not standardized, automated, and visible, execution becomes optional, and leaders lose control.

Business Impact: What breaks without an LMS

- Inconsistent performance across sites, teams, and managers
- Manager re-teaching becomes the hidden operating cost
- Compliance exposure increases, and proof is incomplete, so audits become painful
- Turnover repeats the same onboarding mistakes

What an LMS actually is

- A Learning Management System assigns learning, delivers it, verifies it, tracks it, and produces proof.
- Not an LMS, folders, videos, links, shared drives, and tribal knowledge.
- Minimum bar, role pathways, due dates, reminders, recertifications, dashboards, and audit exports.
- Leadership can identify who is trained, on what, by when, and with what proof.

The 4 pillars of an Operational LMS

- Standardization, role-based pathways, and checkoffs that do not depend on the manager
- Automation, assignments, reminders, expirations, and recertifications run without chasing
- Visibility, dashboards leaders trust, by role, manager, and location
- Governance, version control, permissions, searchable SOPs, and proof trails

Executive Notes: What problems must the LMS solve

Use this space for evidence, decisions, and approval notes you can reuse in leadership meetings.

Owner: _____

Due Date: _____

Step 1: LMS Readiness Diagnostic

Assess current state, identify gaps, and choose the right next move

Readiness signals, check what is true today

- ☐ We have consistent processes across sites, and want to lock them in
- ☐ We have inconsistent outcomes and need standardization
- ☐ We hire frequently, or have high turnover
- ☐ We have compliance exposure, audits, or critical safety risk
- ☐ Managers are re teaching the same content weekly
- ☐ We cannot confidently report who is trained, overdue, and due next

Fit score | 0 = Missing | 1 = Partial | 2 = Strong and proven

Score your current approach, not what you wish it did.

Capabilities	0	1	2	Evidence Note
Standardization: Role path ways and checkoffs are consistent				
Visibility: Dashboards by role, manager, location				
Governance: Version control, permissions, search				
Proof: Audit exports with time stamps and history				
Adoption: Frontline mobile friendly usage				
Analytics: Trends show gaps and risk				
Ownership: Clear owner and operating model				

Decision Path: What to do next

- Total 0–6:** Do not start with vendors. Fix the architecture first. Build role pathways, owners, governance, and proof requirements before buying anything new.
- Total 7–11:** Pilot with one role and one location. Prove adoption and reporting, then expand, avoid big bang rollouts.
- Total 12–16:** Optimize, integrate, scale. Tighten automation, analytics, and governance, then integrate with HR or SSO if needed.

Leadership minimum requirements

Pilot role: _____

Location: _____

Step 2: Vendor Gauntlet and Scorecard

A structured demo, evidence requirements, and red flag detection

The 10 minute vendor gauntlet, require live proof

- ☐ Show a manager dashboard by role and location, live data
- ☐ Assign a pathway to a new hire, show due dates and reminders
- ☐ Complete a module on mobile, start to finish
- ☐ Export proof for an audit, include timestamps and history
- ☐ Show recertification automation, expirations and reminders
- ☐ Update an SOP, show version control and acknowledgement
- ☐ Search for a policy, show permissions and relevance

Weighted Scorecard: Circle weight 1–3, Score vendor 0–2. Require evidence in notes.

Criteria	Weight	Vendor A	Vendor B	Evidence Note
Adoption: Frontline mobile usage, frictionless	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	
Proof: Exports, timestamps, expirations, history	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	
Automation: Assignments, reminders, recerts	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	
Visibility: Dashboards leaders trust	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	
Governance: Version control, permissions, search	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	
Standardization: Role pathways and checkoffs	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	
Support: Implementation ownership, response	☐ 1 ☐ 2 ☐ 3	☐ 0 ☐ 1 ☐ 2	☐ 0 ☐ 1 ☐ 2	

Questions that expose the truth

- What is monthly active usage, by role
- Show how managers are alerted, overdue, and due next
- Show how SOP updates are acknowledged and tracked
- Show export format for compliance proof
- Who owns implementation? What is the rollout plan

Red flags, walk away if true

- Mobile experience is slow or clunky
- Reporting is manual or limited
- No version history or acknowledgement trail
- Recertification requires workarounds
- Search cannot find SOPs quickly

Vendor Decision Notes: What evidence matters most

Use this space for evidence, decisions, and approval notes you can reuse in leadership meetings.

Owner:

Due Date:

Step 3: 90 Day Implementation Blueprint

A practical rollout plan designed for adoption, proof, and leadership visibility

The Rule: Start small, prove adoption, then scale. Most LMS failures are change failures.

Score your current approach, not what you wish it did.

Phase	Weeks	What you do	Proof you require
Define	1 - 2	Pick pilot role, define standards, map pathway, name owner	Pilot pathway drafted, required proof list written
Build	3 - 4	Build pathway, checkoffs, SOP links, and assessment gates	Pathway runs end to end, version control defined
Automate	5 - 8	Assignments, reminders, expiries, recerts, manager dashboards	Overdue report and due next report exported weekly
Expand	9 - 12	Add next role, train managers, standardize governance rhythm	Adoption above target, leadership dashboard in use

Executive KPIs to Track Weekly

- ☐ Adoption, percent active users in pilot role
- ☐ Completion, on time vs late
- ☐ Overdue count and trend
- ☐ Time to proficiency, new hires
- ☐ Audit proof exports, pass rate
- ☐ Manager touch time, reduced

Operating Model: Assign Ownership

LMS owner: _____

Content governance: _____

Manager enablement: _____

Reporting cadence, weekly, biweekly, monthly:

Policy version control, owner, _____

Implementation Notes: Risks and Mitigations

Use this space for evidence, decisions, and approval notes you can reuse in leadership meetings.

Owner: _____

Due Date: _____

Summary

Use this page to brief leadership, boards, or investors on the LMSdecision

Decision Statement

Our LMS decision.

☐ Keep and optimize ☐ Replace ☐ Implement first LMS

Why now: _____

Primary outcomes

1 _____

2 _____

3 _____

Constraints, budget, timeline, integration needs:

Operating Model: Assign Ownership

Top risks reduced

1 _____

2 _____

3 _____

ROI estimate

Manager time saved per week _____ hours

Monthly cost avoided \$ _____

Compliance or quality risk avoided \$ _____

Pilot scope: _____

Pilot role: _____ location: _____

Next steps checklist

- ☐ Finalize leadership minimum requirements
- ☐ Confirm pilot role, location, and owner
- ☐ Confirm proof exports required, audit format
- ☐ Run vendor gauntlet, record evidence
- ☐ Approve 90 day rollout plan and reporting cadence
- ☐ Schedule week 2 checkpoint and week 8 checkpoint

Approval notes, signatures, and commitments

Use this space for evidence, decisions, and approval notes you can reuse in leadership meetings.

Owner: _____

Due Date: _____