

Client: Global Financial Services Firm

Function: HR Department

Project: Select and Implement a Learning Management System

Project Mission

A global financial services firm hired Intellilink to implement a Learning Management System for its North American territory. Since its inception two years earlier, the Learning & Development department had grown its course offerings and needed assistance with managing, tracking, and reporting on its training courses. The Department did not track its course offerings and attendance consistently and therefore had limited reporting capabilities from budgetary and performance management perspectives. Implementing an LMS would increase self-service and automation while freeing up time for the Learning & Development staff.

Challenges

In the interest of reducing costs and reporting on training data by year end, the Firm chose an LMS that could be implemented with a Rapid Application Development (RAD) methodology. The RAD process assumes a 6- to 10-week timeframe to design, customize, and launch the system. This posed challenges in an environment with disparate IT systems for gathering employee data, limited staff resources, and the team's lack of comfort with technology.

Solution

Vendor Selection

Intellilink worked with Learning & Development and senior HR management to gather requirements and reviewed the Firm's existing IT applications. Our consultants then researched LMS vendors, distributed an RFP, arranged product demonstrations by the vendors that most closely met requirements based on their responses to the RFP, and provided final recommendations to senior management.

Project Management

Intellilink led the system implementation and vendor management initiatives. Our consultant was the point of contact and systems expert for senior HR management, the Learning & Development team, HRIS, IT, and other superusers. The Project Manager oversaw the configuration and customization of the system, pilot testing, post-implementation issues, and systems governance as well as engaging in the exploration of additional functionality at the request of individual lines of business.

Change Management

Concurrent with the implementation, Intellilink worked with the head of Learning & Development to develop a change management program. After agreeing on the success measures for the LMS, Intellilink consultants drafted a communications plan to introduce the system to the employees. The communications plan consisted of the initial communications to a sample of cross-functional users for User Acceptance Testing, Firm-wide communications for the launch, and ongoing marketing to increase user adoption. In addition, our consultants created a user's guide customized for the client, trained the system administrator and superusers, and developed best practices for integration with current processes.