

TRAINING RFP QUESTIONNAIRE

1. Company Overview & Market Leadership

How many global organizations currently use your compliance training platform?

Which industries and geographies do you specialize in supporting?

What awards or third-party recognition has your learning solution received?

How often do you update your course library to reflect evolving laws, cultural expectations, and design standards?

Do you have dedicated in-house experts in compliance law, instructional design, and behavioral science?

How does your compliance training integrate with your broader GRC ecosystem or case management platform?

Please describe your approach to ensuring consistency across training, reporting, disclosures and policy management

2. Learning Content and Catalog Breadth

How extensive is your library of compliance and ethics courses (e.g., Code of Conduct, Anti-Bribery, Data Privacy, DEI & Respect, Cybersecurity, Third Party Risk, AI Ethics)?

Are courses available in short microlearning formats as well as full-length versions?

Can course topics be mixed and matched into bundles by region, business unit, or risk area?

Are learning experiences built with global legislative neutrality while still allowing for localization?

How often are courses refreshed for design, relevance, and legal accuracy?

Is your course content developed in-house or do you use third party providers for course content?

3. Customization & Personalization

Can courses be customized to include our policies, leadership videos, and brand identity?

What editing tools or authoring capabilities are provided for in-house content updates?

Does the editing tool utilize on-demand AI translations?

Is customization handled via professional services or self-service tools like a built-in editor?

Can the platform deliver adaptive or personalized learning based on role, region, or prior knowledge?

Does your solution support gamified and simulation-based learning experiences?

Can you provide just-in-time AI videos on relevant topics?

4. Global Reach & Accessibility

How many languages is your content available in?

How do you ensure cultural and linguistic accuracy for global learners?

Are courses accessible to learners with disabilities (WCAG 2.1 AA compliant)?

Do your designs account for offline users (e.g., retail, manufacturing, or field-based employees)?

Is content available in multiple delivery formats (e.g., online, offline, video, job aids, microlearning) to ensure universal access?

5. Technology, Delivery & LMS Integration

Are your courses delivered via SCORM, AICC or xAPI formats?

Can your content be deployed through an existing LMS or does it require a proprietary platform?

If you offer your own LMS, please describe its capabilities (learner experience, reporting, mobile access, etc.)

Can learners access training through multiple devices and offline environments?

How are course versions tracked and updated across global instances?

Can the system manage blended learning, video-based experiences, and mobile-first modules?

Does the platform offer AI-enabled learning assistants, interactive video, or micro-engagement tools?

Is Single Sign-On (SSO) supported?
What are your service-level commitments (e.g. uptime, response time, system performance)?
Is your LMS certified under recognized security frameworks? (e.g. IS 27001, SOC2)
6. Analytics & Reporting
What standard reports and dashboards are available (e.g. completions, due dates, course status)?
Beyond completion rates, what additional learning data is captured (e.g., sentiment, engagement, time-in-course, performance by question)?
Can reports be exported in common formats (CSV, Excel, PDF)?
Can reporting be filtered by business unit, geography, or course type?
Are benchmarking dashboards available to compare engagement or completion metrics across divisions or peers in a side-by-side view?
Are analytics and reporting capabilities available regardless of the LMS used — whether via your platform or through integration with our existing LMS?
7. Compliance Alignment & Legal Rigor
How does your content align to global regulatory frameworks and DOJ expectations for effective compliance
How do you ensure that legal, HR, and compliance subject matter experts review and validate content?
Can your training be mapped to risk assessments, investigations, or policy acknowledgements?
Are audit trails and completion certifications automatically generated and stored?
8. Customer Success & Support
What implementation and onboarding support is provided to ensure a smooth launch?
How long is the typical implementation timeline?
Do you provide dedicated onboarding consultants or project managers during implementation?
Do you provide a dedicated Customer Success Manager (CSM) after implementation?
How does the CSM partner with customers to align training with organizational culture, goals and risk priorities?
Do CSMs serve as compliance learning subject matter experts to help identify relevant content or emerging topics?
If we use your LMS, what type of dedicated support is available to assist in managing campaigns and reporting?
Do you host user groups, communities, or events to share best practices?
What customer satisfaction and retention metrics can you share?
Do you provide online support?
9. Compliance Integration
Which compliance program functions does your platform support in addition to training (e.g., policy management, attestations, disclosures, conflicts of interest, incident or case management)?
Can these modules operate as a unified system with shared data, reporting, and governance structures?
Can policies be distributed, acknowledged, and tracked within the same system as training?
Are attestations linked to training completions or certification cycles to demonstrate compliance alignment?
Does your solution include a disclosure or conflicts-of-interest management capability?
Describe the workflow for disclosure management (approvals, workflow, reporting).
Does your platform include an integrated whistleblower or case management system?
How do you ensure confidentiality, protect anonymity, and comply with global reporting requirements (e.g., EU Whistleblower Directive, SOX)?

10. Innovation & Future Readiness
How do you leverage AI or automation to enhance learning experiences?
What innovations have you recently introduced to improve learner engagement or administrative efficiency?
How does your roadmap anticipate evolving compliance risks (e.g., ESG, AI Ethics, global data privacy)?
How do you collect and act on customer feedback to guide product updates?
11. Commercials & Scalability
How is pricing structured (per course, bundle, or enterprise license)?
Are customization tools and support services included or billed separately?
What options exist to expand or scale the program over time?

