

Working With Vendors

Critical elements for effective outsourcing relationships • BY TAMAR ELKELES



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I recently moved from a business unit role into the learning field and am finding it difficult to determine which external vendors to work with in my organization. There are so many vendors to choose from and it's overwhelming. What are your strategies for selecting high-quality vendors, and what is the best way to work with them?

– Marc

We are so fortunate to have such an amazing and large group of vendors in the learning world. I have been using external vendors, whom I refer to as my partners or adjunct staff, since I entered this field, and I would not be able to do my job without them.

I started using vendors to augment my learning staff nearly 20 years ago, and I am still using many of those same vendors today. When I first created my learning organization, I made the decision to outsource most learning design and delivery, and that model has worked very well for nearly two decades and has proven to be successful because of the vendor relationships that we established.

A critical element of effective outsourcing is consistently using an in-depth process for vendor selection. Independent of the type of work external vendors may do for you — designing curriculum, stand-up delivery, learning technology and systems, executive coaching, online learning — there are three key criteria that I use to select vendors.

Flexibility: The best vendors demonstrate significant flexibility with their models, their work style, their delivery approach, their technologies, their staff and their pricing.

Some vendors have a set model, approach or structure that they will not adapt or change — those are vendors I typically stay away from. Early on in my career I evaluated a highly reputable leadership development provider that had a great curriculum; however, this provider insisted on delivering a three-day management training program. This vendor wasn't willing to divide the content into four-hour sessions and wouldn't reduce the number of training days or modify curriculum to fit my management's needs.

Companies are all different, and solutions need to be customized based on individual business needs. Initial interactions with vendors are good indicators

of their flexibility — look for signs that demonstrate adaptability and willingness to embrace change and modify their solutions to fit your needs.

Cultural fit: It's critical to assess the cultural fit of all vendors before they are exposed to your management and employees. If you work in a highly structured organization and the vendor has a very unstructured approach, it doesn't matter how great the content is, it is not going to be a good fit for your organization.

Test vendors' knowledge of your business, your products and your employees. They should have a good understanding of your company and your organizational culture if they want to work with you. Interview them as you would any employee — make sure they have skills, knowledge and fit with your company. They will be a part of your adjunct staff, and they need to work well with your internal learning team.

Be resourceful and do your homework. Try to find clients the vendor has worked with that are representative of or aligned with your industry, market, business or company culture. Typically the best vendors are those that have a wide range of clients from various industries, which can bring you diverse perspectives and broaden your learning.

Partnering: The most valuable vendors are sincerely interested in being your business partner. They have a long-term view of their relationship with your company and you. They work hard to collaborate with you, your team and your key stakeholders to make sure that everything they deliver is of the highest quality and relevance to your organization.

Ask vendors how long they have worked with their clients, how many engagements they've had with each of them and how they work together with internal staff to deliver business solutions. Many of the vendors I use are willing to take risks, be innovative in their approaches and try new solutions because they are our partners.

A successful vendor partnership is beneficial for both you and the vendor. If a vendor isn't willing to create new solutions along with you, it probably isn't the best partner. True partners grow and learn from each other, and that's the key to having a successful vendor relationship. **CLO**