

YOUR PERSONAL GUIDE TO APPOINTING A
HIGH-QUALITY, VALUE FOR MONEY
MANAGEMENT TRAINING PARTNER



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INTRODUCTION

With outsourcing of training and development projects becoming more popular, the risks associated with selecting and appointing the highest-quality external partner can be a big challenge.

Not only can the process be time-consuming, complex and even a little disheartening, it can, if not done effectively - be very expensive financially. The purpose of this white paper is to provide you, the business leader, manager or buyer with a practical toolbox of questions to ask what will minimise the possibility of you regretting your decision on external partner - and maximise the possibility of realising significant value, *before* making your decision, *during* your training or development project and *after* the provider has left your organisation forever.

How To Use This Information

The purpose of this document and its contents is to actively encourage a truly win-win relationship with whomever you choose and trust to collaborate with you. In the same manner as you need to ensure that you are protected from the potential suppliers' sales patter and self-interest, you also need to ensure that you are open to developing a genuinely collaborative relationship that both parties can enjoy and benefit from. This will not only add significant value to your project, it will promote candid, open, honest dialogue that best serves the project and the people involved. A simple standard to apply - '*Always be honest - It's really easy to remember*'.

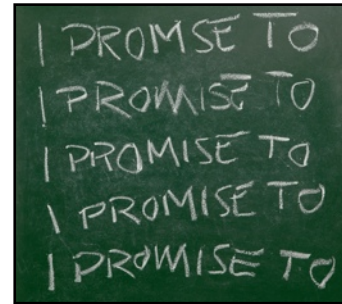
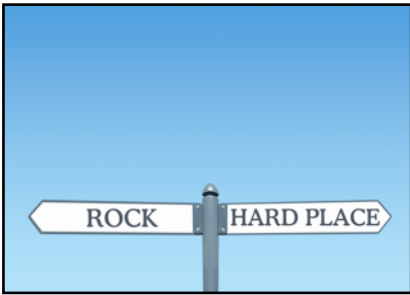
Format of This Information

This white paper is not an all-encompassing list of do's and dont's. The questions you are recommended to ask are documented in list format. Each question can be asked independently of others, or can be asked as part of a flowing conversation. You will know what works best for you so please use them as you feel appropriate.

How Will I Benefit from Applying This Information?

Apply this guidance intelligently and you are far more likely to:

- 📍 *Identify the most appropriate training and consultancy partner in less time and more efficiently*
- 📍 *Significantly enhance value added to your project at lower cost (time and budget)*
- 📍 *Keep the consultant's focus on achieving tangible results - rather than delivering 'training'*



Some Questions To Ask Yourself Before Exploring the Market

Before you invest your time and energy on identifying potential potential partners, take a few moments to ask yourself the following questions. They should help you to develop clarity on your intention, manage risks, identify specific goals and benefits. In addition, you will also be able to develop a clearer brief to issue as part of your tendering process.

What is the rationale for outsourcing?

Outsourcing may be viewed as a way to save time or money, to obtain better quality services or expertise. Ensure that you are clear about *why* your organisation is looking to outsource. Only by being clear about why you are engaging an outsource provider can you focus clearly on the type of results you want or need to achieve in collaboration with them.

What is the level of risk involved in outsourcing?

The consequence of a poorly chosen PC repair service provider (if you catch the damage early enough) might cost only a couple of PC's and several annoyed internal users. But outsourcing your entire customer support to the wrong provider could cost you a great deal in lost sales.

Once you have established a clear rationale for the outsourcing and have a clear understanding of the level of risk, you can begin to determine the detailed specification. You can begin to describe in detail:

- 🕒 **What you will need from a potential partner** (expertise, competence, experience, quality standards)
- 🕒 **What you want the outsourcing organisation to provide** (resources, programmes, client testimonials)
- 🕒 **Your budget** (Your maximum investment, for the whole project or a pilot-project)
- 🕒 **Transfer of expertise and skills** (developing in house capability v dependency on external partner)
- 🕒 **Shared accountability agreement** (the contribution you expect them to make to your project success)

One way of focusing on what you require is by determining how will performance be measured? For all outsourcing activity you will need to be specific about goals, deadlines, minimum standards and other deliverables, such as performance benchmarks.

You will need to think of not only the project deliverables but also the relationship with your organisation, e.g. how any problems which may arise are to be addressed. If you set this up correctly at the outset, your chosen partner can be made responsible for tracking all of the outputs and you will be responsible for spot-checks to maintain or improve quality. The importance of not only collecting performance data but also making sure a pair of intelligent eyes scans it in time to address any shortcomings cannot be overemphasised.

Before you being the selection process you need to be clear on:

- 1.The added value you expect external support to contribute to your project*
- 2.Goals for the project and how success will be measured*
- 3.How you want the relationship to take shape*



You can then begin to select a provider with a level of clarity that will underpin your selection process.

Think Past the Consultant's Sales Pitch

There are many ways that organisations choose outsourcing support. They include word-of-mouth referrals from a colleague or acquaintance, reputation within a certain industry sector, professional affiliations and of course, the internet. As strange as it may sound, many people believe that a presence on page one of the Google search engine reflects higher-quality products/services and a more trustworthy company. Believe me, it's not that simple. Just because a training and consultancy company has an eye-catching web site with a high Google ranking, it certainly doesn't reflect any level of competence.

But whoever you choose, how do you know that they have the capability, experience, expertise and attitude to work effectively with your organisation? Take the following steps and you will maximise your chances of selecting a capable and effective outsourcing partner. The purpose of this document is to encourage you to think past the consultant's sales pitch - *which could be designed to secure a sale rather than answer your questions.*

Ask Who Will Be Involved Day-To-Day

You may have heard statements from consultants such as *'Our people have worked in leadership or senior management positions in some of the world's leading companies'*, and maybe that's true. But while the statement may sound rather impressive, a good question to ask the consultant is *'But what did they deliver in terms of value and business results?'* This is the information you are interested in. After all, this is your budget you are about to part company with, and it is usually a lot more than just spare change so you deserve a straight answer. Always fail to be impressed by simply reading an impressive CV or personal profile. Anyone can write one (and they are always very positive - and never impartial). Dig deeper to ensure that you will benefit from the best possible team to deliver your project. When selecting a provider you should always ask the following:

What Are the Credentials of the Provider Staff?

Qualifications aren't everything, but academic certification is one benchmark that tells you at what level of academic input the provider's staff has achieved. Whatever you use as a benchmark, insist upon knowing the basic qualifications of the individuals who will be working with your organisation and the nature and type of previous experience. Also, a MBA qualification from a respected university doesn't automatically qualify the consultant/provider to deliver your project either. There is a fine balance to be achieved between academic prowess and ability to deliver the results you want.

Ask for copies of client testimonials which relate to projects that the recommended provider's team member have been involved in. Find out exactly what previous clients think about their contribution, attitude and commitment to the project. This protects you far more than reading a cv.



How Consistent Is Their Expertise Level?

Bait and Switch is one of the most annoying practices employed in the outsourcing and consultancy industry - globally! Providers show up to the sales meetings with their top consultants and are eager to impress. But when the contract of appointment has been secured, they deploy an inexperienced team on your project. It is important that you ask who will be involved in the day to day running of your project and ensure that you are comfortable with the resources allocated to your project. *You need to agree this before entering in to a legally binding contract.*



Forget About Colourful Brochures - Focus on Client Testimonials

Remember that any company can use an Apple Mac to produce a beautifully crafted, colourful brochure espousing their corporate values and promoting their services. But not everyone can prove that they are highly competent, trusted, value for money and even - enjoyable to work with. But your focus as a corporate buyer should be on the latter.

You may have had the misfortune of booking your family's summer vacation from a brochure which creates the impression of your hotel being a complete 5-star experience, only to find upon arrival that next door is a noisy, dusty and not very enjoyable building site. The very same principle applies when choosing a training and consultancy partner. Forget the brochure - focus on client testimonials.

If a potential provider cannot (or will not) provide client testimonials on client company stationery together with contact details so you can check them out for yourself - end the dialogue right there. You reserve the right not only to ask for client testimonials, but to verify their accuracy too.



Are the Deliverables Realistic?

Beware of providers who promise the world. Consider carefully whether to trust those who gloss over what could be a complex project. Buying into professionals who are good at what they do, and who outline possible limitations and banana skins is far better than falling for the sales pitch of a bubbly service provider representative who is eager to please and secure a sale over all else.

How Will The Provider Assist In-Sourcing?

You don't want to be locked into a provider in such a way as to militate against switching providers or bringing the function in-house at some point in the future. Answering this question will help you to identify potential partners who should not only be able to provide what you need, but also help you to develop more in-house self-reliance than dependency on external support.

Once you have selected your preferred partner, it is imperative that you can agree a contract that assists in the smooth running of a genuine win-win client/provider relationship. Remember to detail precisely how the partner will seek to transfer their skills and expertise to your organisation. this could be through handbooks, a dedicated blog, coaching helpline, trainer training, podcasts or even a YouTube coaching channel.



Getting the Contract Right

The contract is where all of your assumptions about how the provider will work with you are made explicit. It is also the place where the provider's expectations of you are also made explicit. Enter into contract negotiations with a win-win proposition very much in mind.

You want to achieve your outsourcing objective with your partner as smoothly and efficiently as possible. The contract should allow the provider some flexibility, allow them to make a reasonable profit - and allow them to deliver a worthwhile and meaningful outcome for you. Review the provider's contract more than once. A second read-through allows you the opportunity to double check whether you would like to include or even exclude specific contract points which don't appear fair or reasonable.

All contracts should address the subject of what happens if things go wrong. Unless counter-measures are built into a contract there is a danger that service complaints will go nowhere quickly. The contract should explain what would be deemed as poor performance and how this is to be addressed. Be very clear. This will mean that you will have a responsibility for monitoring the work of your chosen provider. If you ignore your outsourcing vendor for some time, or until things are damaged beyond repair - you will be partly responsible.

Balancing Quality, Performance and Financial Investment

It is important that the contract takes account of performance. Whether the contract is time or output based, it should be broken down into specific deliverables. Some times you will benefit by purchasing these specific deliverables individually within a contract rather than committing to a large fee that covers a large project or period of time. Economies of scale are likely to be a factor in larger contracts and therefore, flexibility in delivery timetables could result in cost savings for you.

Do be careful - about purchasing blocks of hourly or daily service, even though you may benefit from a discounted fee rate for doing so. Think about it for a moment, unless you have developed a high-trust, collaborative relationship and checked out client testimonials to ensure high-quality outputs *before* signing a contract, what incentive does an unscrupulous, financially focused provider or consultant have to deliver the required outcomes quickly? Absolutely none at all. Their focus is *'The slower I work, the more I am paid.'* And this isn't a trap you want to get caught up in.

Questions You Should Ask Your Potential Partner Prior to Entering a Contract

The questions detailed below can be asked independent of one another, or as part of a structured discussion. They will serve to help you select the most appropriate partner and realise more value from your investment in time, energy and budget. The questions are designed to develop clarity, understanding, honest dialogue and collaboration. Ask them politely and you'll be fine.

- (1) May I review six testimonials on client company headed stationery that show me what your clients think of your contribution to their project and return on investment?
- (2) I may wish to speak personally with some of your previous clients to understand more about how you helped them achieve their goals. Are you happy to provide me with office telephone numbers so I can do this?
- (3) What is your level of experience in delivering this kind of project for previous clients?
- (4) What exactly *is* included in the fee you quoted in your proposal?
- (5) What exactly *isn't* included in the fee you quoted in your proposal?
- (6) Tell me about a client project that didn't go well or didn't achieve the goals which had been agreed? Why was that? What role did you play in the project being unsuccessful?
- (7) Who from your team would you allocate to lead this project? What value do they bring?
- (8) What is their level of expertise & what kind of results have they achieved for your clients?
- (9) How will you effectively transfer some of your knowledge, expertise and skills to our in-house team?
- (10) What are your thoughts on how we can measure whether this project has been a success?
- (11) Now you know about our organisation, our challenges and most important goals, what specific contribution do you reasonably expect to make to improving our situation? Why is that?
- (12) What resources of ours would you need access to or support from before, during and after this programme has been completed? Why is that?

We wish you the very best of luck.

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Comments, Questions and Contact Details

If you have any questions or comments regarding the information contained in this white paper, you are welcome to contact the Summit team at:

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