

Maximizing the Client/ Vendor Relationship

Three factors that are the keys to success in client and vendor roles in a project. **BY IRENE STERN FRIELICH AND VERONICA CLEMENTS**



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Have you ever been disappointed with the funds you spent on a vendor even though you did your due diligence in the selection process? Or have you been selected as a vendor and found after a lot of hard work and time with your client, they were less than satisfied with your results? Here, we discuss three factors we consider keys to success in our respective roles of client (Veronica) and vendor (Irene) as we engage in a project.

CAPABILITIES

Veronica (client): I had an interesting experience recently when I hired a vendor to support course development on a project. My team reviewed the corporate-approved vendor's work samples and résumés for the individuals who would perform the work. I thought they had the right abilities and we were ready to go, but it didn't turn out very well. I think there are some lessons from this experience worth talking about.

I described our need for instructional designers who have Articulate programming skills. The vendor's sales partner and I selected three consultants. We reviewed the design, program publishing set-

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tings, and content, along with the aggressive project schedule. I am not sure it was enough.

Irene (vendor): What was the vendor's process for matching its resources to your project? Did the

vendor ask you questions? Where did it miss the mark? As a service provider, it is critical that I ask carefully considered questions. The more I know about your needs, the better we can execute the projects.

Veronica: I did not ask about the vendor's process, but the sales partner suggested consultants who met our basic qualifications, which were instructional design and programming experience. I made some assumptions about their level of knowledge and abilities with programming.

Irene: What happened once you realized that?

Veronica: We had to reassign the unfinished work to our own team and outsourced other priorities. I learned that it is difficult to know someone's aptitude until I observe him or her.

Irene: We recently had a similar situation, where our client expected a certain level of graphic design skill she wasn't getting. We hadn't talked about graphic design since the client was providing all the images and logos we would need. During a regular client check-in, I was able to identify our "miss" and correct it before it adversely impacted the client or our relationship. Our client was pleased with the outcome.

CONTEXT

Veronica: That brings me to another important point. Sometimes we have projects for which we don't have time to provide a lot of guidance. In this situation, I want the vendor to deliver what I need, the way I need it, and by the date I need it.

Irene: We want to do that for our clients, but we're also not mind readers. You know, early in my career I made assumptions such as, "That sounds like a project we just completed, so this client must have the same situation." That did

not always result in the best solution for *this* project. That's why I ask a lot of questions when I'm scoping a project.

Veronica: That makes sense. I prefer to know

the business goals and learning objectives, audience definition, and scope of work description before I engage a vendor. That helps me identify the questions I ask and be prepared for questions the vendor probably should ask.

Irene: It also can be helpful to understand why this work is being outsourced. Does the client lack capacity at the moment? Will someone on the client's team maintain the course we develop? Or will they rely on us for that? Are they interested in upskilling their existing team? If so, I might scope the project a little differently to aid in the upskilling process. It is incumbent on me to ask the right questions. If I feel there is missing or conflicting information, I will dig deeper for context for the request. Knowing the background information also enables me to be more agile as the project proceeds, and I can plan ahead for potential adjustments.

Veronica: Those are good questions to help with context and matching consultants to a project. It also would help me as the client to articulate all my expectations, especially when I am under pressure to get work completed.

Irene: It's also important that I check in with my team of consultants and with my client on a regular basis. So, through ongoing communication, I should be able to identify and correct any issues that arise.

COMMUNICATION

Veronica: As we go, needs might change. So ongoing communication is important, as is determining the frequency and method, such as in-person, virtual,

or written reports. I also encourage the vendor to call me when they have a question rather than waiting for a regularly planned meeting or update.

Irene: That is important to me, too. And I'd want to know the communication styles and ex-

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pectations of my primary contacts up front. Do they prefer to be called or e-mailed when I have a question or prefer that I wait until our meeting? I know you like a phone call. Some clients prefer an e-mail, with a follow-up phone call if they don't reply a short while later.

Veronica: The bottom line is that communication needs to be ongoing, clear, and open.

Irene: That goes both ways. If the client has changes—for example, the subject matter expert (SME) goes on a leave of absence or something impacts our timeline—I expect the same open communication from the client. Once, I had a client who decided late in a project that they wanted us to use a different e-learning tool than we originally agreed on. We wanted to delight this client, so we invested time and funds in the new tool and produced excellent courses. However, we were cautious with this client after that. Surprises—by either partner—can erode trust and the relationship.

Veronica: That's another reason I like having regular check-in phone calls, even if they are only 15 minutes every other week.

Irene: I hear you. You need to know you're getting what you think you're getting. Or rather, what you communicate to us you expect to get.

Veronica: You got it! Vetting capabilities, clarifying context, and planning regular communications are all tied together—they are the glue that strengthens client/vendor relationships. **T**

3 Key Tips for the Client/Vendor Relationship

1. As a client seeking a vendor, clearly scope out the capabilities you expect—both those related to the work product and general consultation skills.
2. The client needs to be clear about the problem it wants to solve: why it has become an initiative, who will work on it within the organization, and what the challenges are. Similarly, the vendor should do its part to clarify the project. This can be done by avoiding assumptions and asking questions to get at the context and the “story behind the story” for the project.
3. At the start of any project, it's best for both parties to agree up front on their communication style and frequency, both for ongoing updates and check-ins, as well as for urgent issues.