



By Charlene J. Zeiberg



**Why am I, a consultant, writing about the lies and antics of vendors and consultants? Having headed up a variety of learning and training functions and having worked as a consultant for a major training firm and now as an independent consultant, I can lend a balanced perspective on the topic.**

A large red circle with a black outline, containing the title text.

## About Consultants and Vendors

When I was on the inside, my expectations of consultants were very high and often unrealistic. Now I spend my time trying to live up to these very same expectations. It always fascinates me when I see vendors living these lies, and I am continually baffled as to what keeps them in business.

Many learning professionals consider consultants a necessary evil, whereas others have had rewarding consultant partnerships. Some of you may fall somewhere in the middle, being cautiously optimistic about your vendor relationships. So, it goes without saying that the lies I share with you are not universal or meant to be stereotypical.

## Recognizing the lies

These lies are standard tales that I have heard as a client or that my clients have shared with me. They are generalized statements or proclamations that have been made by some vendors. I hope that these revelations will lead to more productive vendor alliances and partnerships.

### Lie #1: This team of experienced consultants will be engaged on this project.

While engaging a vendor for an important project, you meet with several of the vendor's consultants who are part of the project team. After awarding the business to this vendor and launching the project, you find that the faces suddenly change to some you've never seen before.

This scenario is all too common when dealing with a vendor. Usually the vendor does not intend to do the old bait and switch, but changes in team members are, unfortunately, sometimes unavoidable when allocating resources among client projects. The best you can do to avoid this scenario is express your concern, ask pointed questions, and let the vendor's representatives know that although you are potentially engaging their company, you are really selecting the team of consultants who have the expertise you require. Be sure to ask these questions:

- Will this be the team dedicated to my project from start to finish?
- Is there anyone on the team that may have a conflicting client project and is potentially not available?
- What can you do to guarantee the availability of the team you presented?

- If you need to substitute team members, whom would you consider? Can you share their résumés?
- Will I have the opportunity to approve the new team members you select? (This shouldn't really be a question, but, rather, a contractual requirement.)

Maybe you won't get all the answers you want, but at the very least you have put your vendors on notice that casual resource swapping is something that you won't tolerate.

### Lie #2: The training materials will be custom built for you.

Most of the more notable training vendors who provide training content have an arsenal of generic content sitting on a shelf waiting to be called into battle. In some cases, this generic content was created based on best-practice research the vendor conducted. In other cases, the content was left over from previous client engagements.

Many times when a client requests a customized program from the vendor, generic content is manipulated, massaged, repackaged, or updated, but very little custom content is actually created. The customized part of the program is often nothing more than a replacement of terms (for example, "employee" instead of "staff member" or "motivational feedback" instead of "positive feedback").

It is important to understand the distinction between custom materials and tailored materials. A custom program should be built from the ground up. A tailored program builds upon generic or previously used program content and modifies it in some fashion, as in the examples above. Many training vendors will charge you a fortune to perform these simple replacements they have labeled as "custom."

To determine if your programs require tailoring or customization, consider asking

- Will you be designing this program and writing all new content or will you leverage your existing content?
- May I review your generic training materials on this topic?



# Lie #1

- What will you do to tailor the content? How does this affect our ownership or licensing arrangement?

**Lie #3: You will own everything we build for you.**

This lie is a typical response to the question on ownership. Ownership depends on these factors:

- Was the content customized, in the true sense of the word, for your organization?
- Was off-the-shelf content or the vendor's intellectual capital leveraged to create your program?
- Did the vendor create any unique case studies, role plays, or content specific to your organization?

The general rule is that the more development work that is performed from the ground up for your project, the more you own outright.

The recent trend is for clients to own all deliverables, giving them the freedom to alter and duplicate program content without cost. Without ownership, you are required to pay per-participant licensing fees, which can be costly—up to \$500 per learner for a classroom program—or you may have to pay for rights to print or use the materials.

If ownership is a concern for you and your organization, be sure to discuss it explicitly with the vendor and ask

- What will we own and have the right to alter, duplicate, and distribute free of charge?
- What do you (the vendor) own? What are the fees associated with our use of this content? Are there any restrictions on the use of this content?
- How will the copyright on the content be treated? Will the vendor own it, will we, or will it be shared?
- What can be done during the design and development process to ensure our ownership?

**Lie #4: Our work is based on best-practice research.**

Many learning and training vendors invest in best-practice research. These vendors tend to be more expensive because of the overhead required to keep research

fresh and current. For some organizations, this research provides credibility for both the vendor and the learning experience.

For others, the research findings may be irrelevant to their organization's role, industry, or culture.

If research is important to you and your organization, you need to accept the premium costs associated with it. Engage the vendor in a discussion regarding its research philosophy and approach by asking

- What guides your research agenda?
- How does the research conducted relate to my project and goals?
- Can you tell me about the research base and whether it's applicable to my industry?
- How recent is the research?
- How often is the research updated?
- Will you provide me with new content based on the updates?

**Lie #5: We use a reliable project management process.**

This was my concern as a client when I needed to outsource projects. I had the expectation, and still do, that vendors should have a sounder and more dynamic project management process than I could employ myself, one that accounts for every task and interdependency. Unfortunately, I have found that this so-called reliable project management process is not all that reliable.

What should you expect and how can you ensure that the vendor has an effective approach to managing your project? Their approach should include

- clear roles and responsibilities
- client resource requirements (for example, a project leader, sub-



# Lie #3

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- ground rules for working together
- a detailed project plan organized by phase or stream of work (or deliverable) with detailed tasks and assigned resources
- contingency plans to account for a variety of what-if scenarios in case task deadlines are not met
- process for identifying client review teams
- client review procedures
- regularly scheduled status calls
- escalation processes
- communication standards
- file-naming conventions
- process for determining out-of-scope activities.

To ensure that a solid project management approach exists, you should ask the vendor for an example of a similar client project and how it was managed, for a sample project plan and project management templates, and for names of former clients that you can call as references.

**Lie # 6: We can support a global rollout.** Global learning is no longer a strategy; it's a requirement. One challenge is to deliver consistent practices and performance across very different cultures. At some point, if it hasn't happened already, you will need to orchestrate the global rollout of a key learning initiative.

The truth is that many learning vendors can support global implementation. It is the extent and expense of that support that is the question.

Essential to your success is the ability of your learning and consulting solutions to retain core consistency with subtle adaptation to ensure relevance and impact in different cultures. Before you determine the vendor's global capabilities, you need to determine your own needs and requirements by asking

- Are you seeking global best-practice research to inform your initiative? A globally adaptive approach can in-grain core concepts consistent with global strategy.
- Do you, for coordination and

management purposes, require the vendor to have presence in the countries you are targeting?

- Do program materials or online content need multiple languages or dialects? Are materials written in English acceptable or must the materials be produced in different languages to maximize learning? Keep in mind that for programs that truly are custom, you will probably need to absorb the cost for translating and checking for cultural appropriateness.
- If it is a classroom-based program, does the program need to be facilitated in multiple languages?
- Must instructors be in close proximity of the delivery location or resident in the countries you will be targeting?
- Must the program be delivered synchronously or is it acceptable to use asynchronous technology so that time differences are not an important factor?

Vendors that are truly global typically have satellite offices and strategic partnerships located around the world, global best-practice research, programs (classroom and online) that are tailored to a variety of cultures with culturally relevant examples, modified approaches to fit local norms and pace, and materials in multiple languages or dialects, and resident facilitators, skilled in multiple native languages and dialects, around the globe.

You may find yourself attracted to a potential vendor that can support your global initiative without being truly global. This may be a concession you are willing to make.

**Lie #7: Our online content will easily integrate with your platform.**

Every e-learning project has technical considerations to manage. You must do your homework to ensure compatibility.

With the advances in SCORM (a suite of technical standards that enable web-based learning systems to find, import, share, reuse, and export learning content in a standardized



# Lie #8



way), learning professionals have a basis for determining compatibility.

Even with SCORM, compatibility is not guaranteed. The only way to ensure that your delivery system can serve up the content you require is to test, test, and test some more to check its compatibility. When looking at e-learning content:

- Learn about the vendor's approach to being SCORM compliant.
- Determine if the vendor has clients with the same LMS or CMS that successfully use the vendor's content. Personally speak to these clients to learn from their challenges.
- Test the content on your own delivery systems.

Despite your best efforts, be prepared to face challenges during the implementation process. Consider the process a learning experience and sometimes a game of chance.

**Lie #8: Clients never tell lies.** Up to this point, I have focused on lies clients might hear from vendors. It would only be fair if I also shared some of the lies that vendors hear from learning professionals. However, calling these statements lies is

probably extreme; many of these come out of the client's optimistic nature and overeager willingness to assist the vendor. These are, in essence, cautions to vendors about client statements that have the potential to lead to trouble.

**We have an executive sponsor for this project.** Although the client organization may have identified the sponsor, the individual is probably not yet engaged in the initiative and committed to it with support and buy-in.

**We have the budget required for this project.** To a vendor's dismay, many times, the desired solution is totally unrealistic given the available funding. It would be helpful if the project budget could be shared with the vendor to help it craft a realistic solution that fits the client's budget.

The counter argument is, of course, that vendors will propose solutions that spend every cent of the budget even if it is not necessary to achieve the objective. There is no easy answer to this one, other than to work with vendors whom you trust.

**We are ready to start the project.** Sometimes clients think they're ready to initiate a project, but they are missing some essential elements for a successful project launch and vendor partnership, including executive sponsorship, determination of approach, relevant materials needed by the vendor, time to dedicate to the launch of the project, established purchase order, availability of SMEs, and a dedicated internal project manager.

Have the vendor create a project plan that outlines key project tasks and deadlines. Carefully review the plan to make sure it's realistic, and includes information about who will review or approve documents if you are on vacation and who else needs to review the documents.

**The design is complete and there are no additional changes.** Make sure that all required parties—including stakeholders, SMEs, and your manager—have reviewed and signed off on any design or strategy documents. Changes, even the most minor, can result in repercussions throughout the project that can cost time and money.

**This project must be completed by the end of February.** Having deadlines is important, but making them too tight can compromise the quality of the project. Many project delays are caused not by vendor delays but by clients who are not able to fulfill their responsibilities. Vendors rely on client activities for moving forward. It is better for the vendor to be waiting for you than for you to wait for the vendor.

**I can make that decision.** Be sure this is the case before you mutter these words. What will happen when you share your decision with your manager or internal client? Is it a minor detail or something that he will have an opinion about? Even if you have the authority to make the decision, others may provide you with feedback that will reverse the decision and erode your credibility.

**I'll get on that right away.** Before you make any promises to provide the vendor with needed materials or schedule meetings with SMEs, check your schedule and to-do list. If you really can't do it, think about delegating the task or moving the deadline. Ask consultants what they need to meet their deadlines before committing.

### Overcoming the lies with truth

There is a correlation between the success or failure of a project and the

quality of the vendor-client relationship. Although there is plenty to be skeptical about, approach the vendor relationship with optimism and openness. The partnership greatly depends on both parties disclosing their expectations and capabilities.

When you select a vendor or consultant, be sure you know and understand

- the scope of the deliverables
- the pricing structure for the project
- the dedicated project team members and their roles and responsibilities
- the vendor's project management process
- the level of customization and tailoring that will be provided
- who owns the materials and the rights associated with ownership
- the research, if any, that will be the basis for your project and its relevance and value

- the firm's global presence and capability
- what the vendor needs in regard to time commitment and resources.

Asking all the right questions won't always get you the answers you want to hear, but it will alert your partners that you are on top of things and make you aware of potential issues down the road. **T+D**

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