

A woman with long, dark, curly hair is looking down at a tablet computer. She has her hand resting on her chin, appearing thoughtful. The background is a blurred office setting. A blue banner is overlaid on the right side of the image, containing the title text. A thin pink vertical line is on the far right edge. A thin orange horizontal line is below the blue banner.

7 STEPS TO SELECTING THE RIGHT **ELEARNING VENDOR**

By **Mason Scuderi & Angeline Evans**

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Learning

We know that organizations that invest in their employees through workforce training see benefits like higher productivity and efficiency, greater employee job satisfaction, lower turnover, and increased profits. Traditionally, this training occurred synchronously in the physical classroom, but the learning landscape has changed. Today, we see meaningful learning experiences delivered via eLearning in the form of online courses, simulations, interactive videos, podcasts, and performance support tools.

These tailored formats offer the flexibility to let employees learn how, when, and where they need – boosting employee motivation through autonomy.

And if you opened this eBook, you already know that in today's highly competitive, increasingly virtual workforce, eLearning is a vital part of your organization's continued success. That is why selecting the right eLearning provider is crucial. However, finding, vetting, and evaluating potential vendors can be stressful and time-consuming.

d'Vinci has been part of more than 100 eLearning vendor selection processes since 1994, and we've seen it done well...and not so well. Both from our experience and talking with industry leaders, we know that having a formal evaluation process can be extremely helpful when it comes to selecting the right eLearning partner.





FACTORS TO CONSIDER

Ultimately, you are not looking for just another vendor; you are choosing a learning partner. One that will work to understand and leverage your training content and goals to create effective and memorable solutions based on sound learning and development principles.

eLearning partners should also be open and honest, especially when they do not see eLearning as the best solution for your particular challenge.

Qualified eLearning vendors will ask exploratory types of questions about:

- Your business goals
- The target audience
- Why you need to create training
- Core objectives or takeaways
- Existing content (or subject matter expertise)
- Your corporate culture and brand

Look for vendors that don't subscribe to the one-size-fits-all approach. You want to find a partner that creates unique solutions that fit your needs and culture instead of tweaking the same old eLearning templates for every client.

Avoid that by understanding their overall development process. How does the vendor go from a kick-off meeting to a unique deliverable your learners find engaging?

THE EVALUATION PROCESS

While you probably already know some of the criteria to look for, you might also be overlooking other important factors. That is where using a proven process can help ensure you will be able to evaluate each vendor entirely and equally.

So, how do you select the best partner for your organization's long-term needs?

The following seven-step process will serve as a roadmap to simplify the selection, ensure the right fit and see that the partnership thrives:

- **STEP 1:** Develop a Prospective Vendor List
- **STEP 2:** Evaluate Vendors' Size, Capabilities, Clients, Location(s) & Approach
- **STEP 3:** Issue an eLearning Development Request for Information (RFI)
- **STEP 4:** Issue an eLearning Development Request for Proposal (RFP)
- **STEP 5:** Conduct In-Person or Virtual Interviews
- **STEP 6:** Evaluate & Select an eLearning Partner
- **STEP 7:** Finalize Contract Terms, Scope of Work (SoW), Budget & Timelines

Now that you know what the steps are, let's look at each in more detail.

STEP 1

DEVELOP A PROSPECTIVE VENDOR LIST

The evaluation process starts by developing a list of prospective eLearning development companies. You will create your list from internal procurement sources, conferences, trade associations, industry contacts, and web searches.

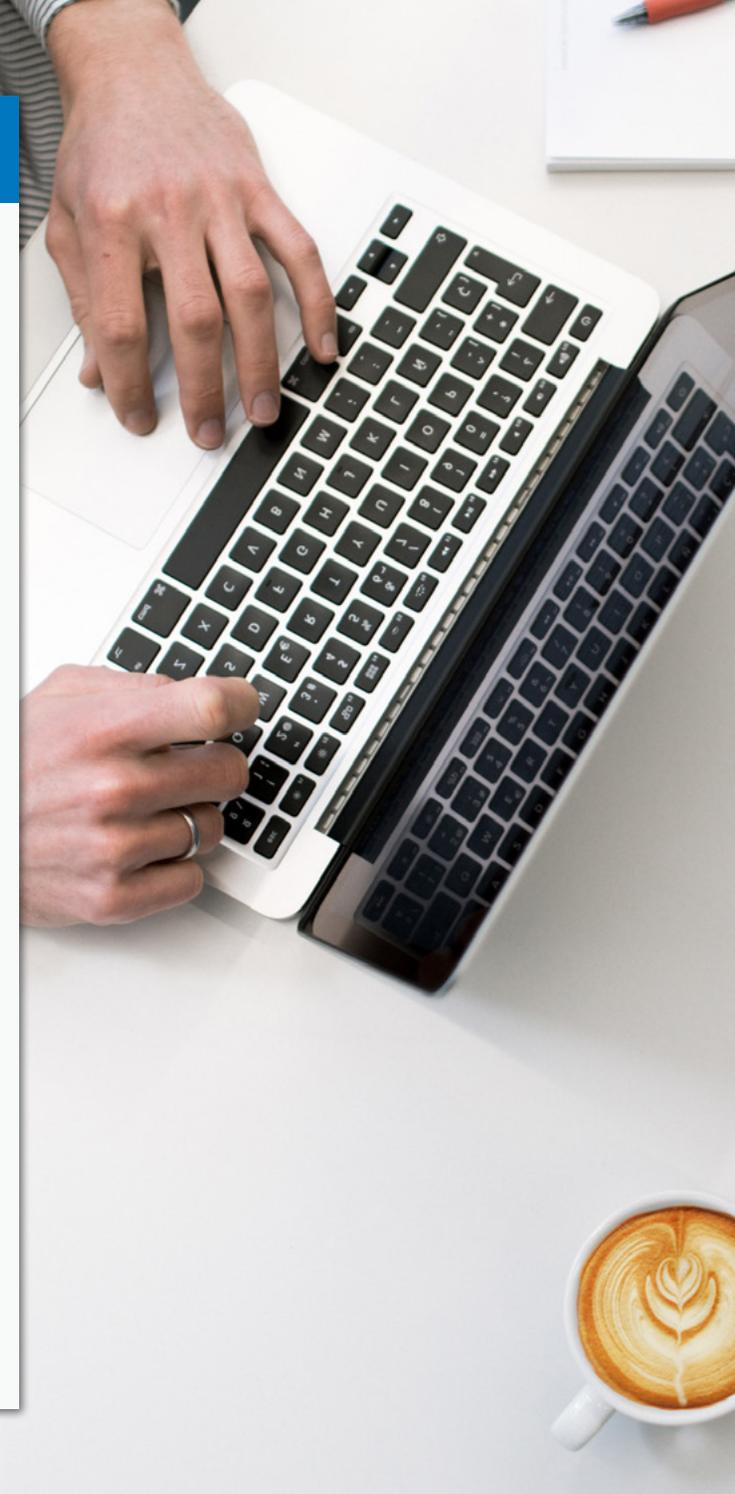
But before the first Google search or the first vendor's name is added to your list, you must clearly understand your project's requirements before you begin the selection process.

DOCUMENT YOUR TRAINING NEEDS

"First, make sure you have a clearly defined skills problem you are solving. Then, ensure you are solving that problem with the right modality," explained Leanna Meiser, Director of Enterprise Learning & Organizational Change Management at The Hershey Company. "We view eLearning as the highest, penultimate way to drive a skill at scale, but it's also the most expensive. So, if that's not the right solution, don't do it. Make sure it's the right solution."

"If it is the right solution," Meiser continued, "the very first conversation with any eLearning vendor should be co-authoring a creative brief. I don't think I would want to continue a partnership with an eLearning company that wouldn't provide me with their brief or asks me if I have one. It's best if you have developed your own learning needs analysis before you even reach out to prospective vendors, so that analysis can inform your creative brief."

To help potential vendors understand and adequately address your requirements, write down all your project needs and expectations regarding audio-visual elements, graphics, technical production, and instructional design, among other aspects.



STEP 1

DEVELOP A PROSPECTIVE VENDOR LIST

CONT'D

LIST YOUR “MUST-HAVES”

Next, create a list of questions that you will ask each provider. The questions will ensure consistency and reliability in your selection criteria and save time and resources by enabling you to easily communicate your needs with prospective eLearning partners. It will also help vendors determine whether they can meet your specific requirements, technical production, and instructional design, among other aspects.

For example, do your needs include:

- SCORM compliance?
- Compatibility with a specific learning management system (LMS) platform?
- What about multilingual translation?
- Do you require 508 or web content accessibility guideline (WCAG) compliance for accessibility?
- Is video, animation, voice-over, or quizzes needed?

It is also essential to ensure that any potential eLearning vendor you include on your list has experience developing content for the desired functional domain. Deep familiarity with working in your organization’s industry can also be valuable. In other words, if you need content developed for healthcare-related subjects or engineering software applications, a vendor specializing in soft skills or who has primarily created eLearning content for retail clients may not be the best fit for your organization.

START YOUR SEARCH

Armed with your documented criteria, you can begin identifying and adding eLearning providers that fit your profile to your master list.

STEP 2

EVALUATE VENDORS' SIZE, CAPABILITIES, CLIENTS, LOCATION(S) & APPROACH

Once you have compiled a complete list of any potential eLearning partners that meet your criteria and requirements, it is time to dig deeper and narrow the list to a handful of vendors you wish to investigate further.

FIND THE TOP FIVE

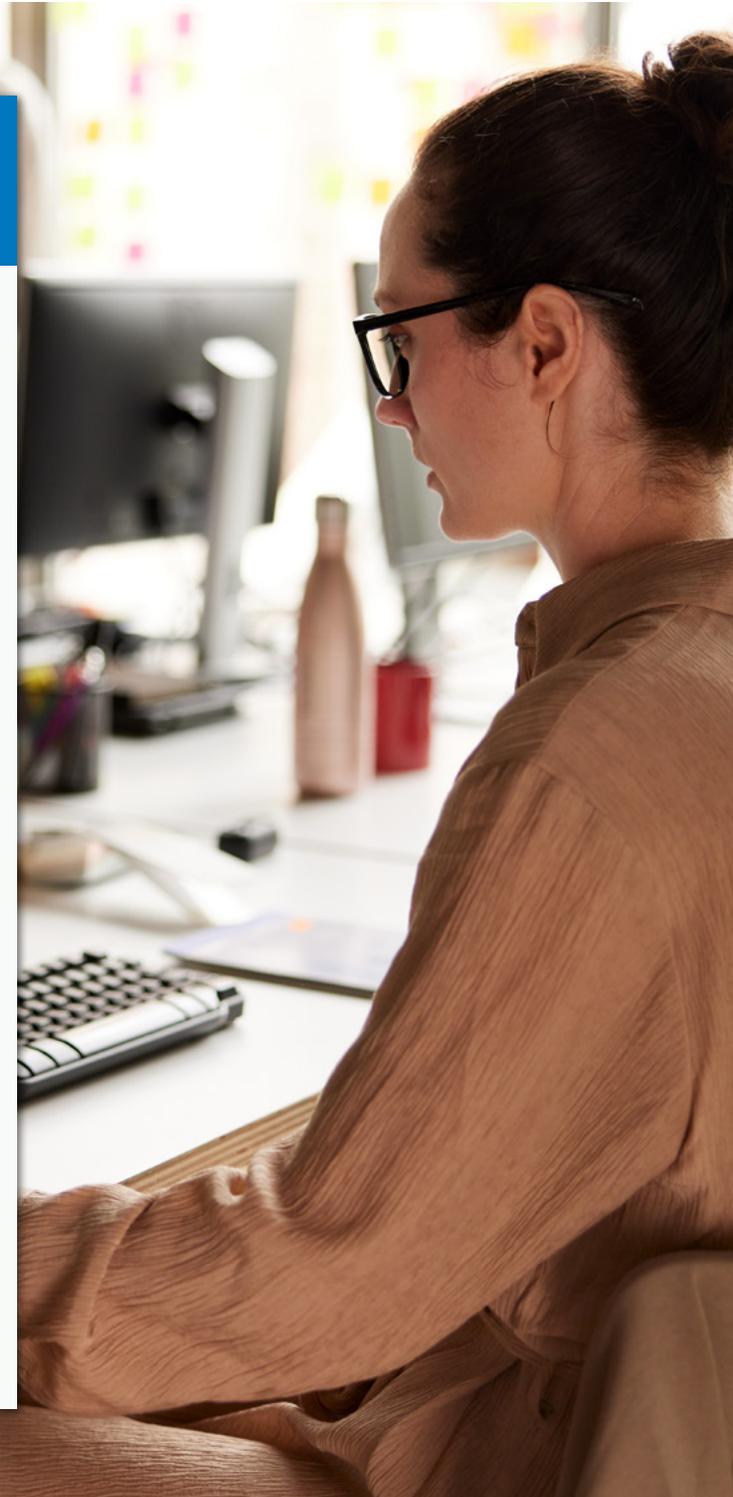
Determine whether you are looking for one vendor with broad capabilities or whether you want to qualify multiple vendors. Ultimately, you will want to narrow your list of prospective vendors to no more than five companies.

To accomplish this, a decision-maker or team should use their longlist to evaluate each prospective vendor's client list and web presence, including their website, social media, industry coverage, and client feedback. This type of evaluation should allow incompatible vendors to be easily identified and eliminated from consideration.

REQUEST WORK SAMPLES

To get a complete picture of each vendor, request work samples and thoroughly review them. Whenever possible, ask that they provide examples most like your project. It is also a good idea to request case studies and client feedback. Gathering this information will help you better understand the quality of content each vendor is capable of creating. It also allows you to review their style, skill sets, and course development capabilities.

As each potential vendor is analyzed, eliminate any whose work samples, quality, skills, and development specialties don't fit the criteria you established in Step One. Continue evaluating and scoring vendors until you have narrowed your search to five or fewer.



STEP
3

ISSUE AN ELEARNING DEVELOPMENT REQUEST FOR INFORMATION (RFI)

After completing your initial analysis and narrowing the list of eLearning vendors, you can optionally confirm vendor interest and gather additional information by issuing a formal Request for Information (RFI).

An RFI asks suppliers for written information on the products and services they can provide. This will help you qualify vendor capabilities for further comparison while gaining feedback on the potential approaches, technology, and feasibility of your project.

Generally, an RFI consists of 4 main sections:

1. Overview
2. Information requested
3. Response expectations
4. Clarification

The purpose of the overview section is to outline your organization's criteria and project details. Next, the information requested section should spell out the information you are asking for from each vendor.

The third section will detail what a vendor's response requires, such as how and when they should respond. Typically, submitted responses are in a consistent format, making comparing each vendor easier.

Finally, the clarification section spells out any additional details not covered in other areas and clarifies any information you don't need. An effective RFI will generate vendor input to help shape the Request for Proposal (RFP).



STEP
4

ISSUE AN ELEARNING DEVELOPMENT REQUEST FOR PROPOSAL (RFP)

When you have narrowed your list of potential eLearning vendors to a final group and gathered all the information you will need to select a partner, the next step is to create a request for proposal or RFP. RFPs officially solicit bids for completion from interested vendors, by asking vendors to respond with a technical solution and cost proposal.

Your RFP should describe the project, the selection or bidding process, contract terms, and scope of work (SOW).

The SOW is a highly detailed guide that defines the specific needs of your project and how to meet its goals. Specifically, it will outline deliverables, timelines, required checkpoints or milestones, possible risks, and reporting expectations.

Be sure your RFP also explains how interested vendors should prepare their proposals. Add instructions detailing what information is needed, the desired format, and guidelines on how a bid should be presented.



To help you get started, download d’Vinci’s eLearning Development RFP Template.



STEP
5

CONDUCT IN-PERSON OR VIRTUAL INTERVIEWS

Now it's time to evaluate the viability of each of the bids you received—everything from the financial health of a potential partner to their overall capability. You want to ensure they can meet your requirements and complete your project in the expected timeframe.

CREATE A SHORTLIST

After reviewing RFP responses, you will likely find two or three candidates have moved to the front of the pack. To make a more informed final decision, invite those vendor finalists to present their capabilities and proposed solution. In addition to getting a complete sense of the effectiveness of each finalist's proposed solution, it will also be an excellent opportunity to get a sense of mutual chemistry.

“The first thing I look at is how they tell me whether their programs are effective. I look at what their benchmarks are in the industry. I take a look at what they have done and what they measure,” explained Loren Sanders, Senior Manager of the Evolution and Transformation Team at CVS Health.

“I'm always going back to measurement. If I take a look at what they report on, it will really tell me how tied into learning they actually are.

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— Loren Sanders, CVS Health

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CONT'D

If they're only measuring completion, and that seems to be the only data point, it's usually not somebody I'm going to work with, or if I really like the (vendor's) technology, I'll try to influence them to do more things on that side," she added.

PREPARE QUESTIONS

Before meeting with any vendor virtually or in person, read their biographies and resumes. Also, look over any supplied work samples and choose one or two most like what you hope to have developed.

Choosing relevant samples will allow you to ask more specific, focused questions using their work samples as a reference point, such as:

- What was the primary learning objective?
- How were learner outcomes measured?
- What was the budget, how was it determined, and how was it managed?
- Were there any budget constraints or unusual client requests?
- What was your process for deciding on the development approach?
- Were there any mistakes made or lessons learned?
- Agreed upon vs. actual timeline. Were there any delays? If so, what caused the delay?

Additionally, some other questions you might want to ask include:

- Are they still working with the client?
- Was the project typical for them, and how did it relate to their strengths?
- What makes this sample an ideal example of the quality of their work?
- If they could redo the project, what would they do differently? How would the final result be improved? How would the budget be affected by the differences?

CONDUCT VENDOR INTERVIEWS

Whenever possible, it is always advisable to conduct interviews face to face. In situations where that is not possible because of distance, timing, or other factors, a video meeting between your team and theirs is the next best option.

After these meetings, the information gathered should give you increased confidence in the decision you are about to make. You and your team should now have a clear sense of your compatibility with your finalists, the level of quality you can expect, and their overall strengths and weaknesses.

STEP 6

EVALUATE & SELECT AN ELEARNING PARTNER

Following face-to-face meetings, the information gathering phases are complete. It is time to wrap up this structured and impartial process by checking references and selecting an eLearning partner.

CONTACT REFERENCES

Take the opportunity to reach out to each vendor's references. Even though the references they give are listed because they will provide positive feedback, you will want to dig deeper. See if the reference will share their thoughts on the vendor's development process. Ask about their strengths and weaknesses.

It can also be insightful if they are willing to share a situation where things did not go as planned, even if the outcome was positive. How did the vendor handle the situation? What did they do to mitigate any issues?

You should talk to various references from various sources, including a vendor's list. One such resource is professional groups like those found on LinkedIn. Remember that other vendors may be members of those groups, so note that you no longer accept solicitations or bids. Otherwise, you may be inundated with new vendors reaching out to speak with you.

SELECT YOUR ELEARNING PARTNER

After completing reference checks, this process will often reveal a clear winner. Although, sometimes, you might find a lack of consensus between a couple of vendors who score similarly.

When this situation occurs, you should revisit vendor proposals and presentations to list the differences between the two in their order of importance or priority. Then assign a point value to each of them and tally up the score to make your final selection.



FINALIZE CONTRACT TERMS, SOW, BUDGET & TIMELINES

Once you make a final selection, it's time to work out the finer details and get the contracts signed so the real work can begin.

SOLIDIFY THE SOW

The scope of work initially documented as part of the RFP usually evolves throughout the selection process. These changes will necessitate your selected partner to alter their proposal to meet your modified requirements.

Ask the vendor to submit development timelines for each deliverable and a cost breakdown. Compare it to your time estimates and budget. If there are significant differences, ask for clarification. You should always understand where a vendor is coming from regarding their estimates. What factors are causing their numbers to be different from your own? Do they include any extra steps you did not account for in the process? After both sides align on the SOW, review the payment terms and contingency policies.

DISCUSS CHANGE ORDER PROCEDURES

Inevitably all projects will require changes in scope, timelines, or deliverables at some point. That is why it is essential for you to clearly define the change order process along with how the vendor will charge for requested changes.

Other issues should not be assumed, like how to handle personality clashes or what happens if there are delays in the timeline due to a vendor's actions. Are there penalties or discounted fees if the vendor misses a deadline?

What is the procedure for requesting personnel changes on the development team?

COMPLETE THE FINAL PAPERWORK

Finally, you will want to identify any other paperwork that is necessary to include in the contract, such as:

- Non-Disclosure Agreements
- Master Service Agreements
- Statements of Work
- Purchase Orders
- Proof of Insurance

Once both sides agree regarding the contract's specifics and the respective legal teams have reviewed all the paperwork, it is time to sign the contract and officially close out your project's evaluation and selection phase.



Next up is the official project kick-off — your first milestone in working with your new eLearning partner!

CONCLUSION

Developing the *right* eLearning solution for your employees starts with selecting the *right* partner. A good eLearning vendor will invest the time to listen to your training needs and business goals so that they can create a tailored solution that meets your unique requirements.

While no approach is ever foolproof, following a formal evaluation process can save time, money, and frustration, making it worth the effort in the long run.

Take the extra time to ask the tough questions and have the right conversations. This will help you find an eLearning vendor that can deliver and function as a trusted partner.



INDUSTRY INSIGHTS

What Qualities Should a Potential eLearning Development Partner Have?

Recently, we asked learning leaders who have experience evaluating and selecting eLearning vendors to share their advice and discuss what they found most important in a potential partner.

Matthew Mortenson, Instructional Designer, First Energy

It starts with communication. I think one of the things that are lacking in a lot of businesses is people communicating back and forth about what the expectations are, what the possibilities are, and then along the line, what is being done. As an instructional designer, one of the things that I try to do the most is communicating throughout the entire process. From the beginning, as you're going through, you're giving progress reports, you're getting a lot of feedback. Communication is a big part of that.

I think accessibility is another big part, because if I have a question, if I need to pull a report, if I'm not sure how something works and I can't get in touch with anyone, then that makes my job harder. I think the job of the company I'm working with is to make my job easier."

Marjorie Van Roon, Senior Manager L&D, Best Buy Canada

"I look for eLearning vendors who quickly take initiative and can keep the project moving forward by proactively getting questions answered. It's critical that our vendors align with our vision."

Dr. Kristal Walker, Vice-President of Employee Wellbeing, Sweetwater

"If a vendor can come in and show, 'Hey, we've worked with this particular company. We've walked them through the entire process from day one and we've partnered with them from day one, and we've invested most of our resources into the post-training aspect so that we can really evaluate the effectiveness of the training,' those are the companies that we tend to partner with because we can actually use that data to take to our executives and say, 'here's a company that's been vetted. They are well known for being able to produce results, and here's why we think it's a good business case for us to partner.'"

Leanna Meiser, Director of Enterprise Learning & Organizational Change Management

"Please invest time with your vendor, onboarding them, and giving them access to all the information you know about the skills problem. Don't delay them, or put off meeting with them if they want to invest time to understand your training goals. If you are bringing in a vendor, they are bringing in a sauce, a special sauce, and don't brush off that critical part of the process."

ABOUT THE AUTHORS



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ANGELINE EVANS: As a client solutions consultant for d’Vinci, Angeline consults with existing and prospective clients to shape custom learning solutions that meet their organizational needs. Angeline knows how to complement proven adult learning theories with creative ideas to produce a meaningful experience for the learner. She holds a bachelor’s degree in applied behavioral sciences and a Master of Education in training and development from Penn State University. Angeline is a member of the Association for Talent Development (ATD) and was the 2017 president of the Central PA Chapter of ATD.