

## ***How to Select a Training Vendor***

By Clifford Brody

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Training has been shown to be the most cost-effective mechanism for improving the bottom line in any organization. However, the vast majority of training initiatives fail because of the poor quality of the content and delivery. So how can you be sure you are spending your training investment wisely? It's all about the quality of the people who are designing and delivering the program.

The first mistake many companies make when determining the best approach to training development and implementation is to believe they can do it themselves. At first glance this may seem like a good idea. After all, internal personnel are usually less expensive than outside vendors and they already know the people, culture and environment of the organization. But designing quality training requires specialized skills, expertise and experience rarely found inside the organization and even if the personnel are available, it is likely that their time could be better spent on other responsibilities.

But even utilizing an outside vendor is no guarantee of excellence in training. There are thousands of training vendors out there – how can one choose among them with confidence?

### **Defining the Need**

The first step in selecting the best vendor for the job is defining the need with a document such as a Training Definition Document. Before researching training companies, the project owner must outline the goals and expectations that the company has for the training program in a formal document.

The document should address the following points:

- Need.
- Audience.
- Budget.
- Objectives.
- Expectations.
- Timetable.
- Evaluation standards.

This document should be reviewed by management and made accessible to everyone who will be affected by the training. Based on that feedback, the document should be re-assessed or re-worked as needed. The more detailed the requirements, the better the overall outcome will be for the company.

## Researching the Firms

Performing research is an essential step in the process of finding the training firm that is best aligned with the company's needs. Luckily, today we have all this information at our fingertips on the internet. When searching for training via the Internet, do a search for keywords associated with the training you need and review the results. In general, there are three things to look for:

- Expertise in the industry.
- A proven track record of experience with similar projects and clients.
- Testimonials and recommendations from clients.

Most importantly, beware of vendors who may have a great website, however no other information is available about them on other sites. Look for mentions on independent sites such as industry associations and Wikipedia.com.

Once a good selection of potential vendors has been identified, the next step is to reach out to them for information. This often takes the form of a formal Request for Information (RFI), but may also be less formal. Either way, it is communicating the requirements identified in the Training Definition Document and asking the firms for a response indicating whether and how they would be able to meet the requirements.

## Narrowing the Choices

When the responses come in, the process of narrowing the choices begins. Typically it will be easy to eliminate certain vendors because they lack the experience and expertise, don't have the necessary resources, or are simply too expensive. After you have reduced the field, it is time to request a formal proposal from each firm. Using the responses received, refine your requirements and communicate these changes to the remaining vendors. Following receipt of the proposals, in most instances it is wise to meet the finalists.

## Meeting the Firm

At least two firms should be selected and interviewed by the company, even if one is strongly favored. This will allow the interview process to remain balanced and provide insight into the industry and the training options available.

Before the meeting, an agenda should be established and forwarded to the prospective firms to help set direction and ensure an efficient flow of information.

During the meetings, the following objectives should be achieved:

- Review of a demonstration of the program or a similar program.
- Review of other work samples.
- Evaluation of the people.
- Review and confirmation of proposal items requiring clarification.
- Understanding of the commitment of the vendor to this project.

After the meeting, those who attended the interviews should ask themselves:

- Were the work samples what is needed?
- Was the quality up to expectations?
- Will the people be easy to work with?
- Is the vendor addressing our needs, or is the focus on getting the sale?
- Is the vendor honest when answering our questions?

## The Final Choice

After making the vendor choice, it is time to negotiate and finalize proposals and/or contracts. Ensure the following points are covered:

- A summary of the work to be performed.
- Deliverables included in each step of the project.
- Timeline for completion.
- A detailed itemized quote.
- Resumes or profiles of the actual project team.

## Final Word

Finding a reputable training vendor who can tailor training to the company's specific needs can be a long process, but it is a vital one. Don't forget that an organization is only as good as the potential of its people, and training is the way to realize that potential and dramatically improve the bottom line.



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