



## External Learning Resources: Strategic Partner or Commodity Vendor?

Richard Y. Chang, Ph.D.

Taking the lead to ensure that you are leveraging the sourcing, selecting and on-boarding of external strategic partners should be a priority.

Facing challenging market and economic conditions now and in the foreseeable future, many senior leaders find themselves outsourcing needed specialized expertise and competencies for positions the organization cannot afford to keep on the payroll permanently. CLOs are not spared this task, often accessing external learning and development resources to help supplement the capabilities and deliverables provided by their functional area.

Depending on the situation, finding and contracting consultants and product suppliers can be a time-consuming and costly process—more so than it has to be. Some of these tips will enable you to look not only at how you source and select external learning resources, but also how you “coach” others in senior leadership to leverage the organization’s investment.

To begin with, how do you think about and refer to external resources? Do you refer to external resources as vendors, key suppliers, strategic partners, etc.? Thinking of an external resource as a “vendor” often drives more short-term, low-cost (commodity-like) thinking during the selection process. The mindset of sourcing a “strategic partner,” on the other hand, tends to drive more long-range, value-added thinking, where learning becomes an investment, rather than a cost.

Just like hiring new employees, on-boarding new external resources requires significant time. They have to go through a learning process to understand the various aspects of your organization (e.g., culture, key stakeholders, plans, etc.) in order to provide the required products or services in a manner that supports your short- and long-term needs.

Stop for a moment and think about how many different external-learning resources you have contracted over the past three to five years. Then, make a ballpark estimate of how much you have invested in the multiple sourcing processes, as well as the on-boarding costs for each new resource. Be sure to include all the labor costs involved. This number could be scary. Churning vendors is a much more costly proposition for an organization than investing in a small number of strategic partners that can support multiple needs over extended periods of time on an on-call basis.

Although selection criteria can’t guarantee you’ll source and select the right strategic partners, it can go a long way toward helping you choose the ones that provide the best fit in both the short and long term. When establishing criteria, some important considerations include but are not limited to:

- **Breadth of Capabilities:** For learning and development resources, the ability to provide services and/or products that can address multiple levels in the organization (executive to mid-management to front-line, etc.) and reach across multiple functional areas is a real advantage.
- **Alignment/Fit:** This can mean different things to different organizations. However, in general, it’s important to consider how well the external resource/firm fits your organizational culture. Look for alignments in the general leadership styles, characteristics and values of your organization and the external resource.
- **Transferable Experience/Expertise:** Often, external resources that are only specialists within your particular industry and/or type of organization can be limiting. Externals with solid experience/expertise and a successful track record across multiple industries can typically bring a greater value proposition. You might be able to learn more from emulating the best applications of world-class leaders than achieving parity with a competitor who might only be mediocre in these areas.
- **Flexibility:** Although many external resources might claim to be flexible, in reality, they are anything but. They spend more time trying to convince you of the rightness of their solution than understanding your needs and flexing their approach, resources and processes to help produce the right deliverables to meet them.

Clearly, taking the lead to ensure that you are leveraging the sourcing, selecting and on-boarding of external strategic partners should be a priority. Remember, it’s a costly endeavor to do over again and again when a little more investment upfront will allow you to do it right the first time. ■

Richard Y. Chang, Ph.D., is founder and CEO of Richard Chang Associates and is author of “The Passion Plan.” He can be reached at [rchang@clomedia.com](mailto:rchang@clomedia.com).