

OPTIMIZING THE TRAINING SUPPLIER PARTNERSHIP



Defining the Need



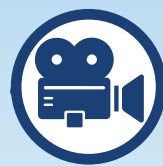
Selecting the Right Partner



Project Preparation in the Green Room



Lights, Camera, Project Kickoff



Recording in Progress: Content Creation



It's a Wrap Project Finalization



Defining the Need

Defining the Need – As a project lead:

- Define business goals and learning outcomes with key stakeholders for each learner
- Define purpose of initial supplier discussion—ie, brainstorm, proposal, RFP
- Determine if this is a true training responsibility and aligned to training plan
- Agree on amount of the learner's time that will be given to this initiative
- Identify support that will be needed from each team to ensure success
- Ensure budget is adequate to achieve learning outcomes
- Identify, consult, and/or secure internal subject matter experts
- Ensure project timelines meet realistic expectations with stakeholders
- Gain agreement on transfer climate with leadership (eg, roles and responsibilities for Training, Sales and Marketing, etc)

Defining the Need – In collaboration with a supplier partner:

- Develop a project plan and track milestones
- Ensure project timelines meet realistic expectations
- Identify behavioral, knowledge, and performance gaps
- Align training and learning objectives to business goals and outcomes
- Define the desired level of learning – Awareness, Understanding, Proficiency
- Identify internal vs supplier responsibilities in project
- Technology/Platform requirements are identified
- Define success metrics as well as develop post-event and follow-up surveys



Selecting the Right Partner

Selecting the Right Supplier:

- What experience and expertise does the supplier have in this topic area?
- What experience, expertise and knowledge does the supplier's project and content team have in this topic area?
- Can you meet the requested deadline without compromised work? If not, what concessions need to be made?
- Please share past examples of similar work.
- When developing training on this topic for our desired learner, what internal and external factors do we need to consider?
- What potential pitfalls do you see with this project?
- What would make the supplier say 'no' to this project?
- How do you know if your last project was a success?



OPTIMIZING THE TRAINING SUPPLIER PARTNERSHIP



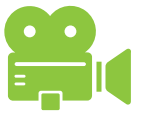
Project Preparation in the Green Room

- ❑ Client chooses supplier with knowledge, expertise, and ability to deliver highest-quality work
- ❑ Outcomes fit into yearly tactical plan and stakeholders are aligned with proposed work
- ❑ Client thoroughly reviews the entire SOW and shares feedback with supplier
- ❑ Time to process SOW is built into timeline
- ❑ Client pulls together working group and internal resources to be used in project (i.e., Scientific Communication Platform, Brand Strategy, Brand Resources, Medical Training Resources, Training Content, Surveys, Training Plans, SOPs, Templates)
- ❑ Client has determined overall budget and high-level timeline
- ❑ Client has determined technology and MRL review requirements



Lights, Camera, Project Kickoff

- ❑ All available materials are shared with supplier, and scope of project is reviewed
- ❑ Get to know the client and supplier working team, determine:
 - Role/responsibilities
 - Preferences
- ❑ Review and align on stages of process, and associated timelines inclusive of MLR/Veeva
- ❑ Agree on process to identify and handle out-of-scope requests and implications to budget and/or timelines
- ❑ Review risk management plans for change in direction, delay, or late change request arises
- ❑ Develop an agreed-upon understanding on how long a task takes to set appropriate expectations
- ❑ Key stakeholders attend to confirm vision, roles and responsibilities and expectations



Recording in Progress: Content Creation

- ❑ Sticking to timelines at each planned stage will ensure project tracks for success. Open, proactive communication to work around any delays/issues
- ❑ Be a strategic training partner
 - Client lead should review the document and pose specific questions to broader stakeholder team. Client lead should review and finalize direction on all stakeholder feedback in a consolidated document for supplier
- ❑ Host Client/Supplier meeting to review client feedback at each stage
- ❑ Client should ensure edits are pulled through as intended; minimal, if any, comments on unchanged content
- ❑ Supplier to keep everyone aligned on progress and risks to deadlines in real time. Out-of-scope requests are handled in real time with impact to budget and timelines
- ❑ Develop a content outline and topic areas that are circulated to stakeholders, approved, and as much as possible don't change; implications-based changes from this point forward
- ❑ Transfer of final source material



It's a Wrap Project Finalization

- ❑ Meeting with supplier and client to discuss:
 - Feedback from learners
 - What went well
 - What can be improved
- ❑ Any financial/reconciliation topics
- ❑ Anonymous feedback from the project team members via survey
- ❑ Confirmation of successful transfer and storage of final version of files in proper system and folders
- ❑ Communication and inventory of asset for continued use
- ❑ Celebration of a job well done!

