



GUIDE:

# CHOOSING A PARTNER FOR ORGANIZATIONAL DEVELOPMENT

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# Introduction

Businesses that invest in organizational development gain value through continually increasing efficiency, improving performance across the organization, and building a robust leadership pipeline that is primed for future success. This is one reason that one-third of companies are increasing their learning and development budgets.<sup>1</sup> A key component in cultivating all of these benefits is talent development. High-potential employees, functional managers, and even seasoned executives can continue to grow with a well-executed organizational development plan.

Organizational development also provides a measurable return on investment (ROI) with results that can include increased profits, higher customer retention rates, or lower turnover among employees. Although ROI is traditionally measured in hard dollars, the metrics used to calculate the effectiveness of organizational development can also include less tangible “soft dollars,” such as employee satisfaction or technical competence, which can then be converted to financial value.

The first step in launching any successful organizational development initiative is to clearly define goals, priorities, and expectations. Some of the questions to consider as you embark on this journey are:

- 1 What are the core competencies you are trying to build?
- 2 What are the specific behavioral changes you seek?
- 3 What does program success look like?
- 4 How will you measure success?





Many organizations start with a long list of goals that must then be prioritized. Although it might feel overwhelming at first, tackling one area for development at a time will make the process feel more manageable. As key milestones are reached for one goal, another training program can be rolled out for addressing the next priority on the list. Taking a methodical approach to training that builds on itself allows employees to make measurable progress while also having a clear path ahead.

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Because organizational development is often such a large undertaking, many companies choose to work with a trusted partner that can guide them through the process. By carrying the majority of the responsibility for developing and implementing appropriate training, measurement, and retention programs, an organizational development partner enables internal departments to focus on the daily work that keeps the company running.

This guide includes best practices for aligning business goals with partner capabilities, a comparison of organizational development approaches, and an interview checklist to help you evaluate potential partners. If you are considering an investment in organizational development with an experienced program partner, this guide will help you determine the best fit for your company's goals.



# Selecting an Organizational Development Partner

Choosing the right organizational development partner is an important decision that requires some research. You want to find the right fit so you can get the most from your investment and ensure that training programs you roll out to employees are meaningful, professional, and effective.

## First, Align Business Goals with Partner Capabilities

One of the most important factors to consider when selecting a partner is whether their capabilities align with your business goals. If a potential partner doesn't have the right level of experience, has never operated in your field before, or delivers an off-the-shelf approach that doesn't match your needs, it's better to know before you make an investment.

The first step is to define the outcome you are seeking. Some examples of common organizational development goals are to make improvements in:



Teamwork and collaboration



Employee accountability



Strategic thinking



Customer satisfaction and retention



Change and agility



Employee engagement



Sales effectiveness



Leadership development and succession planning

Break down larger goals into specific initiatives that are easier to manage. For example, if your long-term strategy includes implementing a culture of customer centricity, you may start with customer service training and follow it up with a program aimed at improving accountability. A good partner can help you evaluate your organizational objectives and determine how to execute the plan for optimal impact. At times, you may even want to address more than one issue within the organization, or have unique challenges that stand in the way of the ultimate goal. Whatever your organizational development goals are, aim to select a partner that has demonstrated success in helping other companies make the necessary changes to produce both long- and short-term results.

In addition to demonstrating previous success, determining if a partner is able to align with your business goals also depends on the proposed timeline and the ability to customize programs to match your needs. When evaluating potential partners, ask for clear milestones with associated timelines so you can determine if you will be able to meet your objectives within the desired time frame.

It is also important to find a partner that can adjust their programs based on your organization's structure, internal dynamics, and cultural values. Having the ability to introduce unique content that addresses your specific needs can mean the difference between mediocre training and a program that creates lasting behavior change. Ask any potential partner how they propose to work with you to learn about your organization's specific challenges and how they plan to create long-term impact on employees and facilitate change.

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## Next, Compare Organizational Development Approaches

Various partners may use one or more organizational development approaches, and it's important to understand what methods they plan to employ with your business. Each model presents unique benefits and challenges; make sure your partner plans to implement a combination of approaches that are most likely to help you achieve your organizational goals.



### Traditional Classroom Learning

This approach, also sometimes called “didactic learning,” typically delivers theoretical knowledge in a lecture or presentation format. Traditional classroom learning relies on participants to listen to and/or read information and then determine for themselves how to apply that knowledge. While it might be an efficient way to deliver information to a larger group, this type of learning typically has very low retention rates, as most people only remember about 10 percent of what they read or hear.<sup>2</sup>



**When it works:** Lecture-style learning is an efficient way to deliver information to a large group of people, such as a review of the previous year or outlining the goals for the next year.



**When it doesn't work:** This type of learning produces poor results when the goal is long-term behavior change; while apparently efficient, it is not necessarily effective at delivering results.





## On-the-Job Learning

On-the-job learning is characterized by employees learning new skills within the normal work environment. Employees are expected to learn by observing others around them. While this may work for simple physical tasks like assembling an information packet or learning how to transfer a phone call, it becomes more challenging when trying to teach larger concepts and promote lasting behavior change.



**When it works:** On-the-job learning works well for simple, repeatable tasks.



**When it doesn't work:** This type of learning may not be effective for teaching complex processes or theoretical concepts that are intended to lead to behavior change. Another potential disadvantage is that not all managers have the necessary leadership or teaching skills to provide this type of training.

This type of learning is too often approached as trial and error. A manager shows an employee how to do the task once, or sometimes not at all, and then the employee is expected to perform the task correctly or figure out on their own the best way to do it. Unfortunately, this results in frustration for both employees and managers. Employees are often unable to meet a manager's expectations, and they unintentionally develop bad habits along the way. This approach also includes an element of risk, because employees are left to test their own ideas in a real-world environment where failure can have significant consequences for the employee and the organization.



## eLearning

This type of learning uses digital and web-based tools for providing training content and can be either instructor-led or self-guided. One of the advantages of eLearning is that employees can learn on their own time and at their own pace. When done well, eLearning is a good supplement to other types of training programs to help reinforce knowledge that was delivered in another forum. Individuals also have access to training content whenever they want to revisit a concept or refresh their memories. However, there are some disadvantages, including limited access to instructors, lack of a group dynamic, and frustration for employees who are less tech-savvy.



**When it works:** eLearning is an excellent tool for reinforcing knowledge taught in another training environment and for educating remote teams.



**When it doesn't work:** This type of learning presents challenges when used on its own or for groups that do not have the necessary technical skills.





## Role-Playing

This type of training relies on participants acting out a scenario to learn how to behave in specific situations. Some of the benefits of role-playing are building employee confidence in handling common workplace scenarios, developing listening skills, and boosting problem-solving skills.

However, trainers cannot replicate every situation that might occur in the workplace. When employees are faced with daily challenges that were not specifically addressed in the role-play, they may not be able to come up with appropriate responses on their own. Successful role-playing also relies on participants receiving expert feedback after playing out a scene. Without an experienced facilitator, participants in a role-play might assume that the behavior that they exhibited was correct, when, in fact, it may not be.



**When it works:** With a qualified facilitator, role-playing can be useful for training small groups of employees how to handle common questions or issues.



**When it doesn't work:** Role-playing can be difficult in large groups and without the assistance of an experienced facilitator. Additionally, not all personality types are comfortable role-playing in front of others, and their anxiety might detract from the experience and prevent them from learning. It is often also seen as “not real.”

Trainers cannot replicate every situation that might occur in the workplace.





## Case Studies

This training tool is commonly used in business schools to teach concepts based on the experience of another individual or organization. In a case study, the actions, successes, and failures of the subject are studied along with any other factors that contributed to the outcome of the situation. Case studies are often used to show how a theory or concept was used in real life. The intent is to convey lessons learned in order to guide group behavior toward actions to embrace or avoid.



**When it works:** The case-study method is a good training approach when introducing a new concept to a group.



**When it doesn't work:** Although a useful teaching tool for demonstrating certain concepts, case studies are not typically effective for convincing employees to change their individual behavior.



## Experiential Learning

Experiential learning is the process of learning by doing. However, unlike on-the-job training, learning is done in a safe environment where participants can test new skills without any risk. This training method uses a combination of:

- An immersive experience that mimics a real-life challenge
- A compressed timeline allows participants to experience the consequences of their actions
- A skilled debrief that connects the experience to the workplace



**When it works:** Experiential learning is the training tool of choice when the objective is to create long-term behavior change in individuals.



**When it doesn't work:** When specific, predefined actions must be learned and followed "to the letter," hands-on application with the actual components of the job is the best approach.

The first step is to instill conviction in participants so they understand how their actions impact the overall performance of the organization. The next steps are to convey knowledge about the concepts you are trying to teach and to allow participants to practice new skills in a safe environment. A results-based debrief will then link the training to real life, and participants will see how applying their new skills and changing behavior in the workplace can produce meaningful results.

# Interview Checklist for Potential Partners

When interviewing potential partners, start with this list of sample questions and add any others that are relevant to your organization.

## Vendor Qualifications

- ☐ Have you worked with other organizations to solve similar problems?
- ☐ Have you worked in similar industries before?
- ☐ Who delivers this training, and what are their qualifications?
- ☐ Are you willing to work closely with our staff and existing vendors?
- ☐ What type of feedback have you received from previous participants?
- ☐ Can you provide client references?
- ☐ Can I see or attend a training session before I purchase?

## Business Alignment

- ☐ How do you ensure that content is current, relevant, and delivered at the appropriate level?
- ☐ How do you build programs that meet our specific needs?
- ☐ Do you provide any customization?
- ☐ Do you run test or pilot programs before we roll out a new program to our organization?
- ☐ How do you adapt programs for a global business?
- ☐ Do you offer any localized content?



## Organizational Development Approach

- ☐ What learning methodology is at the core of your programs?
- ☐ Is your training content primarily theoretical or practical?
- ☐ Do you include examples specific to our organization during training?
- ☐ How can you help us sustain training over time?
- ☐ How long after purchase should we expect to see the programming?
- ☐ How long does the actual training require?
- ☐ How long will it take for us to see results?
- ☐ Do you offer programs to train internal facilitators?

## Investment

- ☐ How do you help deliver value for our investment?
- ☐ Can you help us define a measurement strategy for organizational development and align key performance indicators with greater organizational goals?
- ☐ Is your service in line with our available budget?
- ☐ Are you willing to adapt your pricing structure to reflect scale and long-term needs?

As part of the evaluation process, rate each potential vendor's responses for comparison. Look for a provider that employs the types of organizational development approaches that are most likely to lead to your desired outcomes. Make sure the provider you select offers the level of customization that will generate the most value from training time and deliver a return on your investment in the form of lasting behavior change.

**Use these interview questions to determine qualifying criteria for your potential partners.**

# Next Steps

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Use this guide as a tool to help you evaluate potential partners. As you speak with various providers, use the included rubric to determine which partner's approach aligns with your current business goals and who offers the flexibility to adapt to your specific needs.

Even companies within the same industry face unique challenges, so any vendor you choose should have a process for identifying your objectives and customizing a program to meet them.

The Eagle's Flight team is ready to answer all of your questions about our approach to organizational development, the benefits of experiential learning, and how we can help your company get to the next level. Contact us today to discuss your organizational development challenges and goals.

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## Sources

1. "5 Trends for the Future of Learning and Development." Training Magazine. N.p., 28 Aug. 2014. Web. 22 Feb. 2017.
2. Burge, Joan. "Your Case for Training: Adult Learning Retention Statistics." Office Dynamics. 1225 March 2015. Web. 22 February 2017.

# CRITERIA FOR ASSESSING POTENTIAL PARTNERS



Vendor A: \_\_\_\_\_ Vendor B: \_\_\_\_\_ Vendor C: \_\_\_\_\_

5-Point Rating Scale: 1 = Unacceptable 2 = Below Expectations 3 = Meets Expectations 4 = Above Expectations 5 = Perfect Fit

## Qualifications

ASSESSMENT CRITERIA		Vendor	Vendor Rating				
			1	2	3	4	5
1	Ensures content is current, relevant, and delivered at the appropriate level	A					
		B					
		C					
2	Has a wealth of experience working within a broad range of industries and a substantial talent pool that has the ability to bring perspectives to issues	A					
		B					
		C					
3	Has a proven track record of success in the areas of: • Facilitation • Train the trainer • Working with all levels of management • Collaboration with HR	A					
		B					
		C					
4	Has global experience and reach	A					
		B					
		C					
5	Consistently receives a score of 4/5 on participant assessments of delivered programs	A					
		B					
		C					
6	Can provide a respected list of clients that, given the opportunity, would work with the vendor again	A					
		B					
		C					

Qualifications – Total Scores: Vendor A: \_\_\_\_/30 Vendor B: \_\_\_\_/30 Vendor C: \_\_\_\_/30



## Understanding of Our Needs

ASSESSMENT CRITERIA		Vendor	Vendor Rating				
			1	2	3	4	5
1	Demonstrates a clear alignment to our specific needs	A					
		B					
		C					
2	Is willing to work as a partner toward an outcome, rather than as a vendor with an off-the-shelf product	A					
		B					
		C					
3	Shows a willingness to work within our context, with other vendors if necessary, and makes our needs a priority	A					
		B					
		C					
4	Demonstrates a strong sense of:  • Accountability • Responsiveness • Timeliness • Deadlines • Commitment	A					
		B					
		C					

Understanding of Our Needs – Total Scores: Vendor A: \_\_\_\_/20      Vendor B: \_\_\_\_/20      Vendor C: \_\_\_\_/20

## Approach & Program Content

ASSESSMENT CRITERIA		Vendor	Vendor Rating				
			1	2	3	4	5
1	Content is pragmatic and immediately relevant, rather than predominantly theoretical	A					
		B					
		C					
2	Delivers customized content that uses our examples and reflects our reality	A					
		B					
		C					
3	Delivers high levels of participant engagement in class and post-course	A					
		B					
		C					
4	Demonstrates experiential learning as a core strength (as applicable)	A					
		B					
		C					

Approach & Program Content – Total Scores: Vendor A: \_\_\_/20      Vendor B: \_\_\_/20      Vendor C: \_\_\_/20

## Optional Measurement Capabilities

ASSESSMENT CRITERIA		Vendor	Vendor Rating				
			1	2	3	4	5
1	Pre- and Post-Participant Assessments	A					
		B					
		C					
2	Leadership Assessments	A					
		B					
		C					
3	High-Performer Profiling	A					
		B					
		C					
4	Employee Engagement and Culture Surveys	A					
		B					
		C					

Optional Measurement Capabilities – Total Scores: Vendor A: \_\_\_/20      Vendor B: \_\_\_/20      Vendor C: \_\_\_/20

## Investment

ASSESSMENT CRITERIA		Vendor	Vendor Rating				
			1	2	3	4	5
1	Is focused on delivering value for the investment versus a low-cost solution	A					
		B					
		C					
2	Is aligned with our available budget	A					
		B					
		C					
3	Is willing to adapt the pricing structure to reflect both scale and long-term needs when required	A					
		B					
		C					

Investment – Total Scores: Vendor A: \_\_\_/15      Vendor B: \_\_\_/15      Vendor C: \_\_\_/15

VENDOR EVALUATION			
Category	Vendor A	Vendor B	Vendor C
Qualifications	___/30	___/30	___/30
Understanding of Our Needs	___/20	___/20	___/20
Approach & Program Content	___/20	___/20	___/20
Measurement Capabilities	___/20	___/20	___/20
Investment	___/15	___/15	___/15
<b>Total Scores</b>	<b>___/105</b>	<b>___/105</b>	<b>___/105</b>