Client Relations: Identifying Best Practices for Vendor Communication

A Pass Educational Group, LLC

Project managers accomplish many goals simultaneously. They are masterful at managing teams who create customized educational materials that meet rigorous standards, all while staying within budget and time constraints. Producing high-quality end products on time requires effective communication from all parties. Without communication strategies in place, a small issue has the potential to delay deliverables and compromise quality.

Choosing a vendor with responsive communication practices ensures collaboration throughout the project.

A Case Study

An innovative liberal arts college decides to implement an interactive learning management system for students. This is an opportunity for instructors to customize student-facing material and include interactive features that enhance learning. The college hires a custom content developer to help meet the project deadline; the start of a new school year is fast approaching. A dean from the college works with the vendor to map out the project scope and provide training to a team of eight instructional designers and 30 instructors. While each instructor has creative license for their own course, the dean has established a few guidelines for compliance with college academic policy. Each unit within the course will include an interactive lesson with embedded instructor videos, as well as traditional assignments and quizzes that students will access through the new learning management system.

Over the course of the project, several major issues arise that could slow or compromise the quality of the project, but the developer overcomes each obstacle by using effective and intentional communication. Take a closer look at how effective communication contributes to meeting project deadlines and quality:

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http://www.apasseducation.com

P: 248.742.5124

info@APASSeducation.com

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Project obstacle:
The dean reviews a sample deliverable and realizes there has been a misinterpretation of the directions for the interactive storyboards

Communication plan:
The vendor responds to the dean's email within an hour of the message being sent. A phone conference is planned for later that day to review the situation. A new template with instructions for updated interactive storyboards is sent to all instructional designers and additional training is scheduled for the next day. All previously completed work is updated and the review deadlines are extended so revisions can be made. Email summaries with minutes from each phone conversation and meeting are sent to stakeholders throughout this process to keep everyone informed.

Project obstacle:
The vendor project manager observes a production delay on the final phase of the project.

Communication plan:
The project manager initiates contact with the client immediately after noticing the delay. They schedule a meeting for the same day and discuss reasons for the delay as well as possible solutions. After readjusting the project schedule, the minutes from all conversations are sent to all stakeholders to keep everyone informed. The project manager reaches out to everyone on the team to confirm that they have checked the online schedule and are aware of the changes.

Project obstacle:
The project has a change in scope. The president of the college meets with the arts department and makes the decision to include the arts program instructors and courses into the new learning management system. Additional interactive activities and instructional plans must be created for these new courses.

Communication plan:
The client reaches out to the vendor with the situation. Within an hour, the vendor is on the phone with the client making plans to come on site to the college to help adjust the project scope and project schedule, as well as allocate additional resources to get the project done within the timeframe needed. The face-to-face meeting allows for intense planning, and a successful rollout begins for the additional phase of the courses.

In the liberal arts college case study, all of the project obstacles were resolved by effective and intentional communication. Experienced vendors establish communication routines in each project to keep information flowing to all members of the project team and facilitate readjustments when necessary.

Responsive project managers use communication best practices.

Regular Status Meetings

Status meetings occur weekly, monthly, or at another time interval mutually agreed upon by vendor and client. Meetings take on various forms to fit the needs of the project, such as:

- a scheduled time where all stakeholders gather in person or online

- a status summary of all project deliverables shared with the client at a regular interval

- a quick check-in with all stakeholders at a regular interval to keep the lines of communication open

- a review of deliverables, or calibration round, to solicit feedback and make sure the product is meeting expectations

- time set aside for instructional designers and subject matter experts to meet and review progress regularly

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Email Summaries

A written record of all project matters is vital to both the vendor and client. Keeping track of a project and recording progress is done with written communication. To assist the client, all communication from the vendor is sent via email. Meeting minutes from phone calls and teleconference calls are recorded and then sent out via email as a follow-up. Email summaries include a detailed summary of what was discussed as well as next steps. This communication practice is particularly helpful when many stakeholders are involved and when people are added to a project mid-workflow.

Status Updates

The vendor is constantly communicating status updates to the client in a variety of formats. In the event that a delay may occur, the vendor reaches out at least 24 hours in advance of a delay to alert the client. The reason for the delay is discussed as well as the plan for revising the project schedule. Transparency is a value that benefits both vendor and client. To provide transparency, all parties access the project tracker at any time using an interactive, shared live document such as a Google document or Smartsheet. The tracker displays a live list of what is going on with the project. Deadlines, communication notes, questions, and comments are included to keep everyone on the same page for all project aspects.

Addressing Problems as They Arise

Experienced vendor project managers have a positive and proactive approach to handling projects. They are observant and work to identify and resolve problems quickly. In the event of a problem, communication strategies, such as status updates, regular meetings, and email summaries, assist both client and vendor.

The responsiveness of the vendor matters in all projects, big and small. Ideally, communication features are built into the vendor-client relationship such as:

- weekly meetings
- email summaries
- status updates
- addressing problems as they arise

Effective communication is the foundation of any relationship. Initiating contact, such as a vendor willing to travel for face-to-face meetings, demonstrates the ability to make communication a priority. Communication from the vendor at the end of a project, such as a thank you and helpful follow-up information, shows loyalty and a shared passion for quality. Finding a content developer that exhibits clear and intentional communication throughout all steps of the process is critical to a successful working relationship.

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