

GETTING THE MOST OUT OF MULTIVENDOR PROJECTS

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A number of situations can lead a client to hire more than one vendor for a research project. Often, clients hope to maximize project value by hiring best-of-breed vendors for different aspects of a project. A qualitative messaging study could include members of the creative agency that developed the messages and a focus group moderator hired from a third party to ensure objectivity. Or, a client with an established panel may contract an independent research firm to design and analyze a web survey that is managed and hosted by a panel provider. In another scenario, an ongoing tracking study may pass hands from one vendor to another, and the client may be involved in overseeing the handoff. Whenever a project involves collaboration among multiple vendors, clarity and communication are required for success.

SET EXPECTATIONS EARLY

Even before the project begins, the client can set the stage for a smooth performance by all parties. Requests for bids should lay out expectations for each type of vendor that is participating, including their roles, responsibilities and specific objectives. Some vendors may have reasons for giving preference to projects in which they take a lead role. Clear specifications in the request for proposal or statement of work give such vendors the opportunity to bow out and allow those who are more likely to collaborate effectively to self-select into the process.

Once vendors are selected, the client and lead vendor (if there is one) should initiate a joint kickoff meeting with all vendors participating. This meeting should include the following elements:

Full introductions. Don't assume vendors know each other. Each can introduce his or her company and what the company will contribute to this particular engagement. The client can highlight the strengths that led each party to be selected, which fosters respect and sets a positive tone for collaboration—and indirectly tells vendors what the client expects each to contribute.

Restatement of roles and responsibilities. While roles and responsibilities should already be clear from the request for proposal, the kickoff meeting is an important opportunity to restate and clarify expectations. It's best to err on the side of providing excruciating detail rather than relying on generalities. If one vendor will have decision-making authority for certain topics, or if all decisions must go through the client, a kickoff meeting is the time to make that known. Responsibilities covered in this discussion should be put in writing with all participants giving approval. This way, if there is confusion later in the project or if new team members join midstream (including client team members), everyone has a plan of record and can be held accountable. It is useful to include contact information for every vendor in this document.

Example: The creative agency generating product messages for testing has a standard test protocol they'd like followed. The research agency hired to test the messages wants to take a different approach. This disagreement could result in significant churn, distraction and project delays. However, if the client has defined upfront who owns this design decision (which could be either agency or the client herself), disagreements are less likely to occur in the first place, and can be resolved quickly and amicably.

In many cases in which multiple vendors are employed, clients prefer to be highly involved in management, including comprehensive schedule creation and tracking. If a vendor is to have this responsibility, the client should clearly identify that vendor upfront.

Deliverables definition and schedule confirmation. Time spent on this topic upfront will prevent headache and project delays later. Schedule and specification of deliverables must also be put in writing and must receive sign-off from all parties. Each vendor should create a detailed document specifying the content and schedule of their own deliverables, including key handoffs. These documents can be reviewed by the team and edited jointly until agreement is reached. This process will engender feelings of ownership and further reduce the chance of a costly misunderstanding.

Example: One vendor is responsible for collecting data and another is responsible for analyzing it. Both know the first vendor will clean the data, but each has different definitions of what that should entail. What could become a major sticking point and cause of delays can instead be a smooth part of the process if the relevant vendor puts her definition of data cleaning in writing upfront and works with the client and other vendor(s) to make sure alignment is reached before the data are even collected.

Scheduling of recurring meetings. While vendors and clients all hope that projects proceed exactly according to schedule and without any surprises or setbacks, reality can be very different. It's important to have a regular meeting once or twice a week during which all participating vendors provide updates and discuss issues that may impact scheduled handoffs. The master project schedule should be updated as necessary during this period. Arrangement of payment.

Finally, a minor but nevertheless critical point of clarity at this stage is the arrangement of payment. To keep all of your vendors on an even playing field and avoid possible conflicts of interest, the client must be clear about payment process. We find that whenever possible, it's best for clients to pay each vendor directly rather than having one vendor pay another.

MONITOR PROGRESS

Once the project is in full swing, all parties should include each other in regular progress reports and updates. These can be distributed electronically and reviewed during weekly meetings. A project lead on the vendor side (or the client, if he or she prefers) should record notes during each meeting, highlighting key agreements and action items. These notes should be sent to all members of the team.

If possible, create a collaborative workspace or extranet/portal where all agreements, notes and other project files can be stored. A central document repository ensures that every project team member has access to current versions of relevant documents and agreements

at all times. Schedule updates and other critical path items can also be pushed from this workspace so that all parties have a consistent process for publishing and storing project information. Many large corporations have this capability already via Microsoft SharePoint or similar applications, and many vendors can set up project-specific extranets on the clients' behalf.

ALL'S WELL THAT ENDS WELL

A project debrief provides important insights for future projects. It will be up to the client to set up the meeting and define guidelines. The vendors on the project will likely welcome the opportunity to exchange pats on the back where appropriate and explore ways to improve partnerships for the future. This is also a great time to congratulate yourself on a job well done!