

## ***How to Buy*** **Design and Development** **Services**

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### **In this Session**

- “Test Your Consumer Knowledge”
- 7 practical tips for buying design and development services
- How to buy at this event

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### **Notes**

- This session is intended for consumers. That’s why it’s called *How to Buy*. Although vendors are welcome, please note that consumers are the core audience for this presentation.
- Product and vendor names are provided for example purposes only. They should not be considered an endorsement.

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### How Many?

Hours of design and development are needed to complete 1 hour of:

- Classroom instruction?
- Virtual classroom instruction?
- Basic asynchronous e-learning?
- Complex e-learning

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### What Is?

The average range of rates for a contract instructional designer?

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### True/False?

Vendors have a right to include clauses in contracts that give them an extra day on all deadlines for each day missed by someone in your organization

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### True/False

Contractors and consultants are the same.

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### Multiple Choice

On which engagement are vendors most effective?

- First
- Second
- Third
- Fourth
- Fifth

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### Tip 1: Be Knowledgeable

- Learn standard instructional systems design methodology (ADDIE)
- Learn the key team members on a design and development team
- Learn general timeframes and costs for projects
- Learning average rates for services

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## Tip 2. Check Out Your Vendor

- Meet with potential vendors to determine initial compatibility
- Ask for and check formal references
- Network and check informal references

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## Ask for Free Samples

- Ask for work samples:
  - Final products
  - Interim drafts and reports (needs assessments, design documents, evaluations)
- Ask for other samples:
  - Visit websites or purchase CDs and DVDs
  - Try public classes and webcasts

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## 3. Determine What You Need

- Assessment
- Activities: Needs assessment, interviews with stakeholders, observations, surveys
- Deliverables: Report of what found, objectives, tests
- Guiding concept: No preconceived notion
- Tension: task was already done or company doesn't want to do.

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## Design

- Activities: choose form, develop a sample section, prepare storyboards for all other materials
- Will need to do some assessment to verify assumptions (if not included) and learn content and audience.
- Tensions: client has preconceived idea and vendor has other ideas.

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## Development

- Development—take existing design plans and turn them into course.
- Usually goes through three drafts.
- Tensions:
  - Vendor wants to be more creative
  - Vendor doesn't follow plans
  - Client refuses to allow any assessment or orientation, so vendor has limited knowledge base
  - Client thinks complete design plans are enough

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## 4. Write a Tight Agreement

- All deliverables
- What deliverables should include (format—print, electronic, both), no missing information, source files, provided in industry standard formats)
- Due dates
- Service levels
- How to handle scope changes, missed dates and agreements

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## 5. Know How to Pay

- Learn two major payment rates:
  - Time and materials: Hourly rate—can include a not-to-exceed; paid weekly, bi-weekly, or monthly on invoice; preferred by experienced organizations
  - Fixed price: One price; paid in installments with deliverables, preferred by newer organizations
- Learn going rates in your field

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## 6. Be Fair

- Don't approach RFP as needs analysis—a service for which you must pay (and will, one way or another)
- Don't go thru RFP unless you actually plan to sign a contract

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## 7. Approach the First Project as a Learning Experience

- Start with a kickoff meeting
- Check early drafts
- Plan to review first drafts closely
  - Read closely
  - Write specific comments
  - Avoid value words
  - “Transferring” from you to the vendor

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## How to Buy Here

- Visit vendors
- Sample e-courses
- Attend sessions
  - Consider consultant speakers as coaches
  - Consider vendors for presentations
- Network
  - Find out who people use
  - Learn about their satisfaction

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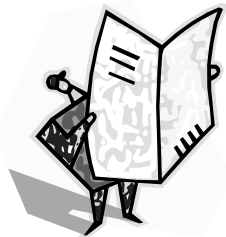
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## Take-Aways



Name at least 2 things you learned here that you can apply in your work.

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