



# HOW TO...

## OUTSOURCE YOUR TRAINING DESIGN

It's sad but true that not everyone loves training design. Even those who do may not always have the time needed to do it justice.

But it often feels too hard to pass on to someone else. You've done the research/TNA; you understand the context; you know the people; you have a pretty clear idea about what will go into the workshop/programme and how you will run the sessions. Involving someone else can feel unnecessary or even invasive. So you decide to do it yourself... and then find yourself without the time to do it properly.

Hiring a training designer CAN give you the best of both worlds: You retain control of the outcomes, save time AND get the standard of deliverables you need. Here are my tips for outsourcing the design so you get what you need and the designer is able to do their best work.

1. **Be clear about the Outcome and Objectives** – Sharing the ultimate outcome and key objectives with your designer will help to keep them on the straight and narrow. Make sure that you have consulted with all stakeholders and incorporated their needs BEFORE you outsource.
2. **Paint a Picture** – Let the designer understand the context and audience. They will NEVER know the audience or business like you do, but that might be a good thing: it will stop them over-thinking or getting sucked into history or politics. But they DO need to make sure that the training they design is appropriate to your organisation and resonates with the participants.
3. **Be Honest** – If there are any restrictions regarding practicalities, or any logistical issues that they need to bear in mind be open about them. There's no point a designer designing an event that won't work or has to be significantly altered.
4. **Scope it out** – Either provide a top-line outline of the programme/workshop OR ask the designer to create one following your consultation. You can then use this as a blueprint for design. How to design a detailed outline can be found [HERE](#).
5. **Be Reasonable** – Remember that the designer doesn't have the inherent knowledge that you have. It will take them time to get up to speed in relation to your organisation and your way of working. Generally, you shouldn't have to bear the cost of this, but you DO need to give them the time. On a similar note, you know how long training design takes: Break down what's involved in the project and agree a deadline and allocate reasonable time to do the work.
6. **Embrace their ideas** – Using another designer gives you a great opportunity to inject fresh thinking and new exercises into your training material. Tap into the fact that they have lots of experience to draw on and trust their judgement AS LONG AS they adhere to the outcome, objectives and practicalities that have been specified. You can (of course) always reject their ideas.
7. **Agree Deliverables** – Be clear about what documents are required and in what format. If you just need slides and handouts say so. If you want session plans, manager guides, e-learning storyboards etc, make it clear. Likewise, specify the standard of finish: Full graphic design or just a draft in Word that the Marketing department can work into something that's fully branded?



8. **Agree what's in and out of scope** – Number of revisions, typesetting, proof-reading, sourcing of images, graphic design and any programming should all be discussed as part of the outsourcing. This allows the best allocation of tasks for the timescale and budget available.
9. **Have copyright and IP discussions** – just so that there's no unnecessary conflict later in the project.
10. **Provide a Template and/or Sample** - Every designer works to their own templates, but if something is presented differently to the way you're used to, it can be harder to assess and integrate. Good designers can adapt their style to suit YOURs, but only if they know exactly what that is. Provide a template and a sample so that they get it right first time AND submit it in the right format e.g. MS Word, Google Docs, Articulate Rise etc. Similarly, if you want things to be in line with your brand, provide logos and brand guidelines.
11. **Agree Milestones** – No designer wants to be micro-managed, but equally it's not sensible to step away until everything is complete. Focus on WHAT will be completed and WHEN but leave the HOW to them. If you are outsourcing a large piece of work (such as programme) it makes sense to review the creation of the first module frequently but less so after that. It's good to make sure that the designer doesn't go too far down the wrong path and waste time and effort. However, be aware that design can be messy and sometimes things may not look like they are on track when they are. Just keep having conversations.
12. **Give them Access** – To your source material, and to your people. A good designer will want to make it IMPOSSIBLE to tell it's been written externally. Yes, they may add something fresh, but they will definitely want to reflect what you already have, use examples that are relevant to your business and use the language that reflects your culture. That's much easier if they can reach for it whenever they need to. It's also helpful to signpost specific resources or people that you think will be particularly helpful. If you were writing this yourself, what/who would YOU go to?
13. **Be available** – You are essentially delegating something you are responsible for, so being available for the designer to check fine details or make a decision will allow the whole project to maintain momentum and maximise success. Be the **one point of contact** that they need to do a great job for you.
14. **Know when to take it back** – It's completely reasonable to expect your designer to deliver materials that are correct, complete and to a high standard. Any significant amendments should of course go back to the designer. BUT asking them to make very minor amends (maybe to change a few words or picture because one of the stakeholders doesn't like it) isn't a good use of your time or money. By the time you've briefed the designer, they've done it, and you've checked it, it would have been quicker to do it yourself.

For more help [TAKING A DESIGN BRIEF](#), download our Free Guide.

