

# balance sheets

A series of information sheets for employers interested in helping employees balance their work, family, and personal responsibilities

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# Xsheets™

A series of information sheets for employers interested in helping employees balance their work, family, and personal responsibilities

The Center for  
**Work & Family**  
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CARROLL SCHOOL OF MANAGEMENT

**One Small Step**  


MIDWESTERN  
WORK-FAMILY  
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***“Employers may hire one consultant for all phases, from analysis through implementation and operation, or they may hire different consultants at different stages. Whatever approach is followed, care should be taken to ensure that the consultant has the specific skills needed for the particular tasks.”***  
*Employer's Guide to  
Child Care Consultants  
Child Care Action Campaign, 1992*

***“The most important concept to bear in mind when selecting a vendor is that there are actually two customers: the employee, for whom information, counseling and referral services are directly provided, and the company, for which account management is provided. In this case, the vendor can work as a strategic partner to support the company in meeting business objectives.”***  
*The Corporate Guide to  
National Dependent Care  
Resource & Referral Services  
Families and Work Institute, 1997*

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## Working with Work/Life Vendors

The term “work/life vendors” includes consultants -- who provide expert advice to employers making decisions about work/life programs -- and service providers -- who supply various services directly to employees. Some vendors offer both consulting and employee services.

Due to the confidential nature of the relationships between employers and vendors, this issue of the *Balance Sheets* series focuses on the process of working with work/life vendors, rather than providing information about specific vendors. Neither employers nor vendors are identified.

### WHY USE A WORK/LIFE VENDOR?

Employers choosing to establish employee and family supportive programs may save time and money by working with work/life specialists who are experienced in designing, implementing, marketing and evaluating programs. While some work/life initiatives may be easily and cost-effectively handled by internal staff, employee task forces or student interns, the more broad-based efforts usually require expert advice and assistance. In some instances, having a neutral third party assessing needs or guiding the development process may be especially beneficial. Consultants and service providers can help with activities such as:

- Needs assessment
- Benchmarking
- Child care center operator review and selection
- Developing flexible work policies and guidelines
- Employee seminars
- Management training
- Employee resource and referral services

There are various types of work/life vendors, ranging from small consulting groups, which provide expertise in a particular area, to large organizations, which offer consulting services in addition to direct employee services. Employers may work with vendors on a project-by-project basis or may have an ongoing relationship spanning a period of years. Typically, an internal liaison is designated to work with a vendor, which can minimize the potential for miscommunication.

Among the factors to consider when selecting vendors are: experience, business knowledge, innovation, cost, follow-through, integrity, quality and accessibility of services, and the vendor's ability to communicate with individuals at different levels of your organization.

*This page features "collective words of wisdom" -- i.e., a wide range of tips and advice gathered from employers who have experience working with work/life vendors.*

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## **CHOOSING AND WORKING WITH VENDORS**

**Involving consultants early on can save time.** It can be quite valuable to work with vendors early on, particularly for designing questionnaires or defining programs.

**Set clear performance standards.** Be clear about your needs and expectations for services and any reports you want from the vendor. The vendor should be comfortable asking questions and finding out exactly what the employer needs.

**Know what you can afford.** Working with vendors can be expensive. Know how to quantify the value of the programs you are considering. Many vendors have developed sophisticated methods for determining the return on investment.

**Understand how you will need to communicate within your company.** What level of communication will you need for management? Will your vendor be able to support your promotional needs -- i.e., E-mail, posters, flyers, etc.? Be prepared to manage the communication process with all levels of employees about new programs being introduced, rather than focusing just on managers. One way to optimize communication is to develop a question & answer sheet for employees and distribute it to them directly when new programs are introduced.

**Make proposals on "your terms."** Vendors often try to customize so much that it can be really hard to draw a comparison. Make sure you set basic terms when evaluating potential vendors so you can compare "apples with apples."

**Get clarity from vendors about which, if any, of their services are outsourced.** Find out who will actually be providing services to your employees - it may not be the vendor you hired.

**If possible, sample resource and referral services before you choose a vendor.** Set up a "test run" by calling the provider with various sample scenarios that represent issues faced by your employees. Have several people in your organization do this and compare reactions. You may be surprised by the consistency of people's impressions.

**Key success factors include:** responsiveness, open communication, performance metrics, and willingness to understand your corporate culture.

**Make sure that the philosophy of your work/life vendor is compatible with your organization=s.** You=re not just purchasing products or services, you=re dealing with people and issues concerning them and their families. Vendors need to understand what the employer is doing and why, and should also be able to assist in making the business case to senior management.

**Getting different vendors to work together is critical.** You may have different vendors for different work/life programs, or you may need to integrate internal and external services, which can be challenging. Start by defining who the stakeholders are and get them to the table. Spell out in your contract what is required of the vendor with respect to working with other vendors.

**Build a strong relationship with your account manager.** The potential turnover of the vendor account manager can be a detriment to a long term strategic plan. Your account manager must know the vendor's internal organization structure extremely well and know how to get things done. You may want to establish a second vendor contact just in case.

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## **EVALUATING AND CHANGING VENDORS**

**Scan the marketplace regularly to make sure your vendor is keeping up with leading edge developments in the field.** Contracts should be reviewed every year (especially watch automatic renewals) and check for changes not highlighted in the cover letter. You should bid on contracts every 4-5 years, even if things are going well with your vendor.

**If you are changing vendors in an acquisition, it's important to actively include the acquired company in the process.** The vendor may have a personal relationship with the decision maker. You should have background information on why programs were established and who the key leaders were.

**Manage a vendor transition carefully.** When terminating a contract with a vendor, get a clear, written agreement about how the transition will be implemented. Also, verify that the vendor's management has clearly communicated the transition process to any staff members who may continue to receive requests from your employees during the transition. Be sensitive to the fact that some employees who are already working successfully with your previous vendor may have difficulty with the change.

**Successful transitions rest on the quality services.** Having a smooth transition with, for example, an EAP vendor, has less to do with flyers and brochures (since employees often don't pay attention to information about services until they need it) and more to do with the quality of the case management and follow-up. If your employees are pleased with the quality of the new vendor's services, then chances are your transition will go well since word of mouth is still the best communication tool.