

Selecting the Best Executive Education Partner: The Voice of the Customer



UNICON Research Report

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UNICON Research Report: *Selecting the Best Executive Education Partner: The Voice of the Customer.* UNICON sponsored this research initiative conducted by co-authors Pat Cataldo and Kelly Bean. The result is an updated organizational look at the topic of university and non-university executive education identification, evaluation, and selection. It will provide new UNICON members with a good background on an important subject. For more experienced sponsors, clients, and university providers, it provides an increased understanding of recent Pre and Post - COVID developments and the changes which are occurring as a result.



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Abstract

While corporate learning has undergone dramatic changes in recent years, one constant has been the importance of executive education leaders understanding how organizations identify, evaluate, and select the best executive education partner. Additionally, understanding the critical decision criteria and the final selection process has been of interest to various audiences. This study takes a 'Voice of the Customer' approach, which involved interview questions with global practitioners and following up with a video interview. These individuals were all skilled at the partner selection process and what clients value most in these relationships.

Research Questions

Seven questions were created to assess how client organizations select preferences for an executive education partner before the pandemic, after it, and finally, how they will do so in the future. These questions ranged from who to consider, how to determine competence and fit, and who and how the final selection is made for the best partner. The questions considered university providers as well as non-traditional providers and new entrants.

Most Important Findings

Looking at the results from all sources of data, the authors can report that some results "might have been expected," some "might have been considered reasonable given COVID," and some "might have been a surprise."

The data tells us quite clearly that what clients value most in a partner relationship is the program's content and the name and reputation of the supplier. One key finding was when customization was included in the list of "what clients value most," it was highly ranked as one of the top three choices.

Another finding was what clients valued most in an executive education relationship compared to what UNICON member schools believed clients would value most. There was a high degree of alignment and congruence from the schools – while not in the same order – with the same five answers clients had provided. The UNICON members' number one and two selections were exactly the same as what the clients selected as their top choices.

While the interviewees initially said there was no difference in pre or post COVID considerations, the video interview discussions uncovered contrary feedback. The finding was the more the interviewees talked about it, the more changes they actually identified due to the pandemic. An example was in the area of executive education options. Clients now seek partners who can provide more program alternatives to on-campus offerings like online, live online, hybrid, or blended programs. Those suppliers, both university and non-university, who can provide additional educational alternatives will receive more consideration than those that can't.

Another finding was the ranking of price. Again, clients rated it in the top three most valued items which was much higher than when this survey was conducted in previous years.

Summary

Readers of this report will receive the most current executive education partner criteria. Organizations, both clients and providers, will understand what has changed, what's needed now, and what further can be done to succeed in uncertain times. Based on the research, the conclusions and implications from the authors should be valuable inputs for executive education procurers and providers.



The Research Methodology: (sources of data, research questions, etc.).

Following discussions with UNICON Research Committee members, the methodology involved a series of data collection steps – a literature review, interview questions followed-up with an interview, a summary of the discussion sent to the interviewee for review, a one-question UNICON member survey, and research data on current practices in the field of executive education.

In order to get a better understanding of the current practices for client identification, evaluation, and selection organizations used for determining a university or non-university executive education supplier, a series of questions were developed. An initial draft of the questions was prepared and field-tested with a number of qualified educational practitioners in executive education. The feedback received was helpful, and some questions were changed due to the input. After the questions were revised, they were retested and approved before final use in the data collection process.

Research Questions

- 1. What factors does your organization consider to identify, evaluate, and select a University-Based Executive Education partner?**

Can you please step back to 2019 and early 2020 before the advent of COVID-19 and tell us what your organizational decision criteria were at that time?

1.a. Are the decision criteria the same or different since COVID-19? What are the considerations now when identifying, evaluating, and selecting a university-based executive education partner?

1.b. What other factors for a non-university vendor are different from what is being used to evaluate a university-based partner?

2. What is the specific process or the steps taken before a selection decision is made? Please describe.

3. Please identify the primary differentiator in your organization's decision to go with a specific university or external provider?

4. What does your organization value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.

Please rank the items using 100 points – *“larger the number = the more important.”*

A. _____ Reputation of the faculty

B. _____ Quality of the facilities provided for training –classrooms, food for breaks and meals, break-out rooms, workout room, amenities, etc.

C. _____ Content of the program

D. _____ Location of the program

E. _____ Name and reputation of the business school

F. _____ Price of the program

G. _____ Peer involvement in the program

H. _____ References from others internally or externally

I. _____ Live Online offerings, self-paced programs, or Flex programs including a combination of both online and campus-based learning

J. _____ Program customization (creative or unique program approaches)

K. _____ Other: _____

_____ _100_ Total of above rankings will equal 100 – *(some could be 0)*

4. a. From the list above, is there one particular item that is being valued more now since the pandemic?

5. Did your view of what was important during the selection process evolve or change once the program was offered? Please describe.

6. What advice would you give other companies looking to find the best university executive education partner or outside partner for their needs?

7. Finally, have you increased your engagement with new entrants or non-traditional providers in the learning market over the past 12 -18 months? If so, why? If not, why not?

The original proposal stated that interviews would be conducted with 15 corporate executives (CEOs, CLOs, Executive HR leaders, Leadership Development heads, or Line/Functional Heads). These were individuals who were currently purchasing executive education open or customer programs or who had purchased university programs in the past. The authors were aware of the UNICON members' concerns regarding requests to provide client names for use in research project work. Therefore, the contacts were to come from the co-authors' own networks and connections. However, when this was discussed with representatives from the Research Committee, there was a concern about enough international representation. Therefore, the Research Committee members were asked to support the project by offering potential interviewees' names for broader worldwide input. Universities that provided interviewee names were the University of Michigan – Ross School of Business, University of Chicago – Booth School of Business, MIT – Sloan School of Management, and University of Pennsylvania – The Wharton School. This support enabled the researchers to contact and interview 24 practitioners worldwide.



Research Process

This client research was done as a multi-stage process.

1) The Literature Review was done first and completed. The details are listed in Appendix A.

2) Each interviewee* was sent an introductory email stating the objectives and scope of the project, a copy of the seven questions that would be asked by the researchers, and a suggestion of dates and times for a Zoom, Skype, WebEx, another platform, or telephone call. This provided the opportunity for participants to reflect on what they would be asked by the authors prior to a video call or phone call. Most of the interviewees used this as an opportunity to write out their answers and return them to the authors before the call. Additional information is provided in Appendix B.

3) The face-to-face follow-up video calls brought authors and interviewees together for personal introductions and to gather additional information for question and answer clarification.

4) A summary of the points discussed in the interview was sent to the interviewee for their review, modification, and approval.

The following information is a summary of the written and oral feedback obtained from interviewees on the questions. There were 24 interviews conducted - nine more than initially proposed. The locations of the interviewees included 12 states (CA, CO, GA, IL, IN, MA, MO, NC, NJ, NY, TX, and WI) and seven countries (India, Netherlands, Saudi Arabia, Spain, Japan, UK, and the USA). These global responses provided a balanced research input with 58% from the USA and 42% from six other countries. The co-authors were able to get responses from a wide variety of 21 industries comprised of small (six), medium (four), and large (fourteen) organizations. The follow-up interviews were mostly done via Zoom or a platform that the client recommended. Additional information is provided in Appendix E.



Video Follow-up - Interviewee with one of the authors (in the lower right corner)

** N.B. Many interviewees requested that mentioning their company, name, or title wasn't necessary. However, some asked for complete anonymity, and therefore, any interviewee's personal data was not included. Instead, a summary of the location, title, gender, and industry segment was noted in Appendix E.*

Research Aims

This paper provides new members to the industry with a good introduction to how partners are identified, evaluated, and selected. For more experienced clients and providers of executive education, it helps to enrich their understanding of pre and post-pandemic partner process changes. In doing so, conversations between clients and business schools can be more productive and result in better outcomes from both an individual and an organizational perspective.

Findings and Discussion

In researching the paper's topic through the Literature Search or via direct interviews, it was apparent that organizations from various industry segments use a variety of approaches to identify providers and decision-making criteria to determine the best partner. However, while some used a more traditional approach for university vendor selection, many attempted to tailor their process to determine which fit, level of expertise, relationship, and faculty might serve them best. Some were structured, check-list procedures involving detailed RFP and RFQ (Request for Proposal and Request for Quote) responses. Others were more informal, less detailed, and more interactive with account representatives, faculty, program staff, and consultants. Still, other leaders focused on the educational impact on the

organization expressed by performance indicators such as retention rates or employee attitude surveys. This HR-driven perspective also included individual leadership impact looking at how an executive or manager changed as a result of the executive development program.

1. What factors does your organization consider to identify, evaluate, and select a University-Based Executive Education partner?

Can you please step back to 2019 and early 2020 before the advent of COVID-19 and tell us what your organizational decision criteria was at that time?

The unaided raw information provided from a global audience could be grouped into five major preference areas. The most mentions in answering Question One were Reputation, Faculty, Content, Price, and Location. The authors expected to see three of the Top Five criteria (reputation, content, and faculty) present as value drivers. However, what was not anticipated in the Top Five criteria were price and location.

Reputation of the School
Faculty
Content of the Program
Price
Location

In citing faculty as a selection criterion, there were a variety of clarifying comments.



Faculty - Expertise in their Area of Knowledge
Faculty - Leadership Professors
Faculty - Professors who relate research to a business setting – not just theory
Faculty - Quality of their Interaction and Delivery to Senior Audiences
Faculty - Quality of the Lecturers
Faculty - Credibility
Faculty - Reputation
Faculty - Responsiveness to Suggestions or Requests
Faculty - Fields of Expertise
Faculty - Reputation, Research, Publications, etc.

Two respondents discussed the role of the faculty director as one that rose to the top during the last two years. It was noted that having direct access to a faculty director, one who was involved in all aspects of the programming, was a welcome change from the past years of access being driven by executive education staff. We found this interesting because it was clearly a differentiator for one school, as both respondents presented their experiences with a faculty director from the same institution.

There were also other items mentioned as selection criteria that may be worth noting.

- Professors who relate research to a business setting – not just deliver theory
- Demonstrate success with companies of similar industry and size
- How well the university understands the client
- Interest in us and in meeting our needs
- Ability to facilitate remotely
- Ability to deliver in a format & time frame required by the company
- Capability to service a global organization based in many locations and languages
- Deep research and external perspective for a partnership
- Willing and open to working in collaboration with us
- A proactive stance vis-à-vis our questions (and any additional ideas they can offer)
- Coaching and mentoring to reinforce the learning
- Content needs have shifted to be on-demand and personalized
- Instructional design variations

Each statement suggests what a client might be most concerned about from a prospective partner. For example, there were numerous comments about professors who had significant research but an inability to relate that to a business setting. This was also expressed when discussing customization pertaining to the faculty member's ability to be open to flexibility and change in their materials. And mentioned at different times and in different ways was the genuine interest in understanding the client's business, issues, and a learning solution that would allow clients to derive the maximum benefit for their people. Finally, the ability to facilitate remotely is needed and necessary when face-to-face programs are not an option. While many said they were willing and ready to return to face-to-face programs when they were available again, the learning process for individuals and teams never stopped. The

pandemic has forced people to escalate their virtual options and consider what else can be done in place of on-campus or on-site learning. The majority of practitioners interviewed saw these changes continuing into the future but were not explicit about the when or how. Considering other modes of delivery is or should be the focus for both clients and suppliers. Those providers that do it and do it better than others will no doubt see the rewards.

Readers Note – Reference text explanation on Page 13 and Page 48.

As soon as the client Interviewee responses were received, they were assigned a number between 1 – 24 so there was no further reference to the Interviewee’s name, title, or organization. This same process was used for feedback from UNICON schools with numbers between 1 -15. However, the names of the schools were recognized as contributors in the Acknowledgements section.

Client Interviewee Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Summary of Client Responses - (Item scored using 100 points total)																								

UNICON School Responses																								
Unicon School Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15									
Please rank the items using 100 points																								

Schools mentioned during the interview process were:

MIT, Harvard, Insead, IMD, University of Michigan, University of Minnesota, University of Pennsylvania, Carnegie Mellon University, and the University of Chicago.

Non-University Providers mentioned during the interview process were:

American Express Leadership Academy, Center for Creative Leadership, Coursera, DDI, MIndGym, BCS, TMAWorld, Korn Ferry Emeritus, Execonline, and BetterUp.

1. a. Are the decision criteria the same or different since COVID-19? What are the considerations now when identifying, evaluating, and selecting a university-based executive education partner?

This proved to be an interesting follow-up question. While over 70% of the interviewees provided answers such as “No major difference, Criteria is the same, Did not change post-COVID, Still the same,” surprisingly, as they talked more about it on the call, they expounded upon what had changed for them. This also included discussing their relationship with their university or non-university partners and what they had done or not done during the pandemic. This then turned into an interactive exchange of comments as they thought more and talked more about how things were and how they are now.

As the conversations continued, the authors got comments like, “The emphasis post-COVID is now on delivery options – online, blended, or face-to-face when it returns. These were not the same conversations we were having pre-COVID.”

Then reality set in, and authors got comments like these: *“Thinking about it more, we have a much stronger focus on digital delivery and the overall employee experience. COVID has moved our face-to-face delivery online, and we cannot simply move content to a webinar. The experience and engagement need a different approach, with strong, interactive teaching techniques and a seamless digital experience (integrated.) We decided to move from 3 face-to-face executive programs to one online and two face-to-face. This change made the experience in the online session and learner engagement now key.”*

“Maybe I was too hasty with my answer at first. Now we have determined that as a result of the pandemic, our people need to be virtual. Some of our learning people had problems with non-university vendors saying, “No, the training we offer you has to be face-to-face. Our answer was quick and direct as we said, “this is not possible anymore.” Our partners were now challenged to give good training in a virtual environment. Some of the big ones, which happened to be one of our non-university partners, weren’t fond of this change initially. They strongly believed that this COVID situation would all pass over, and in 6 months, classroom training would be back again. They were proven wrong.”

“The pandemic period opened our eyes that there is a lot more that can be done through digital learning methods than we realized. With behavioral topics, there is a strong preference for face-to-face learning. However, if it’s to “study the knowledge,” we could easily do that through digital means. Using these platforms makes it more efficient to do it from home or at the office.”

“Our learning from the pandemic was that we have been able to add the capability to engage a geographically dispersed audience with digital technologies for learning and engagement.”

“The criterion now is the ability to go virtual. We have found that US professors are still struggling with the new lift that is needed to deliver virtually and effectively. They have to be able to keep learners engaged and actually understand what happens to a learner when they are logged into a Zoom session, and it’s all lecture - BORING.”

There was a strong feeling among global interviewees that face-to-face executive education programs might be reduced but would be returning. Interviewees noted that previously run programs were starting to return when OMICRON hit. This latest strain has some companies and employees hitting the pause button on travel and large numbers of people for annual meetings, award programs, or face-to-face programs. These individual decisions have also been influenced by various state, country, and governmental mandates.

However, the good news is summed up by the following comments from a senior learning and development executive who put it this way: *“While our decision criteria are still the same for both university and non-university partner selection, we are even more focused today on live meet & greet session and dialogues with their peers in face-to-face programs. When they approach me with their opinions, they say they still prefer to go to a live program with live dialogue. Executives miss the interaction that is created in on-campus programs. They, more explicitly, will delay taking an online session and wait for a university experience. In my view, within our company, we are surprised at what is actually possible online to deal with the pandemic. But, if we want to have a leadership dialogue and work on cases together, their preference still is to do it offsite in an open or face-to-face executive education program.”*



1.b. Are the factors for a non-university vendor are different from what is being used to evaluate a university-based partner?

As opposed to their responses to Question 1. a., 16 interviewees said their processes would be the same or similar for evaluating universities vs. non-universities as partners. The major difference in identifying, evaluating, and selecting a non-university partner was:

- 1) Non-university partners are chosen for their expertise in specific fields such as productivity enhancement, project management, or some specific HR-related areas.
- 2) In identifying these sources, they expect that those hired are not only experts in their subject matter but also have deep business knowledge in the client's specific industry or in a closely aligned industry.

- 3) Along with the teaching, they also look for these professionals to relate recent, relevant information on how other companies are working with and applying this knowledge.

Conversely, it was noted by one interviewee that university executive education partners were chosen for the development of broader management knowledge and skills. In contrast, non-university partners were chosen for niche areas where the client does not have the expertise.

This belief was echoed by another interviewee who noted that the most significant difference is the ability of a university-based partner to apply real-world knowledge and expertise in a non-academic way. A university's challenge is approaching work in a less academic way and more in a corporate way. It all has to do with a sense of urgency and practicality. Non-university experts are felt to be better at current information being in the field with clients on a daily basis. Consultants are much more agile at customizing their way of working with clients and have a much better understanding of current industry issues and problems. There were numerous comments about universities being slow to respond in general and specific statements about not getting back with information and answers in a timely manner.

More information was provided that said, *"where niche needs exist, non-university vendors have more specialized areas of capabilities, and their consultants can provide a more in-depth level of focus."* Another commented that they would use the same criteria but would take diversity into consideration more with a non-university vendor.

From a large company, they remarked that *"in our organization, university partners are generally used for smaller programs. On the other hand, non-university suppliers are more scalable. Therefore, we consider value, content delivery, flexibility, and language capability are some of the other considerations to identify a good fit. We are now also looking at their teaching techniques for blended learning possibilities or digital solutions for learning."*

The most significant difference centered around what exposures the faculty or consultant had in being an industry leader along with their academic background. University faculty considered were those with previous industry/business experience and exposure they otherwise may have acquired through outside client consulting work.

Another consideration was the amount of teaching they had done regarding the topic the company was seeking. Bottom line: *"For our needs, university professors absolutely must have industry experience before we hire them."*

Non-University Consultants and Professionals



University Business Professors



2. Is there a specific process or steps taken before a selection decision is made? *(i.e., the learning officer or line manager for the unit does the searching and makes a recommendation, sent to HR Committee for approval, and Chief HR Exec takes it to the Executive Committee for final approval)?*

Consensus Decision Making

Most of the respondents used a formal RFP or RFQ process to obtain structured information to help them evaluate potential executive education university or non-university partners. In addition, many elected to use some form of committee approach. They either had a team in place or formed a cross-functional committee to look at potential vendors. Most of these were HR-based and assisted by line member participation from the groups being served. One interviewee mentioned that once the committee was assembled in his company, an outside consultant was hired to lead the process of finding an executive education partner.

Internal Data and Surveys drive the Learning Requirements and Expectations

Along with the collaborative team approach, many responded that they looked at data.

- *“A needs-based” assessment conducted by company management.”*
- *“We do a needs assessment for feedback from the businesses, a gap analysis, and look at what problems or issues the executive leadership committee is looking to solve.”*

- *“We respond to the leadership learning requirements of the CEO and the Board.”*
- *“Our needs are based on a set of learning criteria, and we determine the relevance of each.”*
- *“Our organization has some internal processes which determine a set of leadership criteria and sub-criteria and then assign weights to each criterion.”*
- *“Our Leadership Development executive establishes the process to identify the competency gaps for a specific segment of our associate population. Then, they translate this into the broad learning objectives before seeking a partner.”*

Searching for the Right Executive Education Partner

After the learning needs and outcomes have been established, the external search begins to identify possible qualified vendors. Some interviewees mentioned that before anyone else from the outside is considered, they look first to their existing university and non-university partners. Since they have already been vetted and known, if they have the capabilities to do additional work, it is easier to re-engage them than to search for others.

The majority noted that they look to come up with a shortlist of three candidates, and once those are determined, they schedule meetings with each one personally. Whether they use a criterion weighting process or another method, they are looking to determine the right content and approach, how the vendor differentiates itself from others, the cultural fit between the client and the vendor, and price considerations.

One interviewee made a particular point of mentioning what they look at and how that has changed from previous engagements. For example, she noted the questions they ask now strongly reflect the pandemic - *“Who has the latest learning techniques? What is the interactive content they can provide if the proposal is virtual? How much blended learning experience do they have? What are the backgrounds of the facilitators they feel will match the company’s organizational culture?”*

Selecting a University or Non-University Executive Education Partner

An evidence-based approach for response evaluation and vendor final selection



Who Makes the Buying Decision?

The answers were wide and varied. While two interviews spoke of having no set decision path that was followed, others responded in detail about how final selections were made and

who was involved. There were 69% who said the ultimate approval rests with the CEO, President, Chief Human Resources Officer, or the Senior Management Team.

They chose to explain their organization's final decision process as follows:

- President and HR make the final decision with line managers selecting candidates.
- HR executive selects the final partner for an executive education program based on educational content, track record, evaluation/reputation, cost, etc.) and takes it to the President for final approval.
- Once a final decision is made, it is then approved by the Chief Human Resources Officer and the Senior Leadership Team.
- Final decisions are based on program focus – leadership development by the HR executive, technology program by the Chief Technology Officer, financial program by the CFO, etc.
- The final result is decided by the Management Committee of the company.
- We submit our work to the Executive Leadership Team for approval.
- Executive Education Programs are approved by the Chief Learning Officer, their boss, or the head of HR, depending on the total cost.
- With inputs from the CEO, COO, and the head of Strategy and Innovation, the two executives on the Committee (Learning Executive and Line Manager Executive) made the selection decision.
- The approval lies with me in Corporate Learning or my boss depending on the spend level based on brand and how the partner differentiates itself in terms of educational outcomes.

In summary, most respondents indicated they follow specific processes or steps before decisions are made. The approval depends primarily on the expenditures involved as well as the level of executives or senior-level management attending the executive education program.



3. Was there a primary differentiator in your organization’s decision to go with a specific university or external provider? If so, what was it? (i.e., CEO was an alumnus of the executive education school we selected, previous past experience with the school, etc.)

This question prompted many stories about how and why partners were chosen. Most interviewees were of the opinion that their process was fair and unbiased. They felt all finalists were given an equal chance to win the business. With so many people involved in most high-value executive education situations – Senior-Most Executives, Finance teams, Purchasing, Board Members, and in some cases, Consultants, etc. – the final decision was believed to be well-vetted. Many reached out to obtain outside inputs when the various providers were in the consideration process. Peers from other companies in their respective industry were also called for feedback. This was cross-functional and involved reaching out to numerous senior executives, which could be other heads of companies and other leaders in Finance and HR and contacts in Purchasing.

Further, non-aligned industry contacts were also called where there had been a previous relationship. Overall, this was part of the due diligence on the finalists and not considered as creating any undue pressure toward a selection. In total, the best-qualified vendor was given the business.

There were positive endorsements on the decision differentiators like the following: *“No, there were no internal influencers who attempted to sway the selection. The provider selected offered the most responsive, attentive, and detailed response to the RFP of any other. While we recognize that an internal influence can happen, that is not the way we operate as a company.”*

The clear differentiator for another interviewee was *“the faculty director was an expert in this field. This director was the one the school picked to head the university team for our program as well as teach in it. His credentials were outstanding, and his presentation demonstrated that he had previously done many similar engagements. Therefore, it became another major decision criterion for us to have an appointed faculty director who had to understand us and be a knowledge expert as well in order to help us.”*

Another example that was offered was: *“For the specific program we have been discussing, the primary differentiator for the school selected was the way they viewed strategy and how they coupled it with technology and innovation. Most of the other strategy programs that we evaluated were more traditional. We wanted to be at the cutting edge of what’s next vs. what’s now or has already passed.”*

However, it was noted that pressure and influence could be applied from the various organizational circles to change the decision? While selection influences are rare, they do occur. If the committee recommendation for a partner is not accepted and changed in favor of input from a strong influencer, it causes concern for those involved in the entire identification, evaluation, and selection process. It results in many who worked hard on coming up with the best solution to question the time, effort, and energy put forth in recommending the right decision for the company. However, there may be some small redemption factor with the client organization looking to find three finalists to be

considered. It is normally not a question of whether they can do the program but more of a consensus on which finalists might be able to do it better.

Some interviewees were willing to offer specific examples of pressure and influence situations they were part of or had to deal with in the final selection process.

Here are some examples:

“The CEO was an alumnus of one of the finalist schools. He had attended one of their executive education programs in the past. He expressed his satisfaction with the experience and the numerous benefits he derived from his participation. As a result, the CEO’s endorsement became a strong differentiator in selecting the partner. Otherwise, the interviewee stated that school and faculty reputation would have been the stronger differentiators.”



“The prime differentiator was the President of the university for one of the finalist’s organizations being considered was a member of the client’s Board of Directors and actively involved. This strongly influenced the selection process. Coincidentally, the school presented the most compelling proposal with the best price, so the decision was an easy one.”

“Yes, references from the CEO, executives, or Board members who have been to a program or had an association with a finalist school could be an influencer. We listened carefully to their feedback. It may be a bit old school, but people are comfortable going where others previously had a good experience. However, sometimes selecting the same provider had an effect that everyone had gone there, so some executives actually preferred to go somewhere else instead. In giving it another thought, the interviewee said that two female executives recently came in privately to say that they were not interested in the institutes that had been used in the past” but would really like to be considered for some new offering that other attendees had not been to before.”

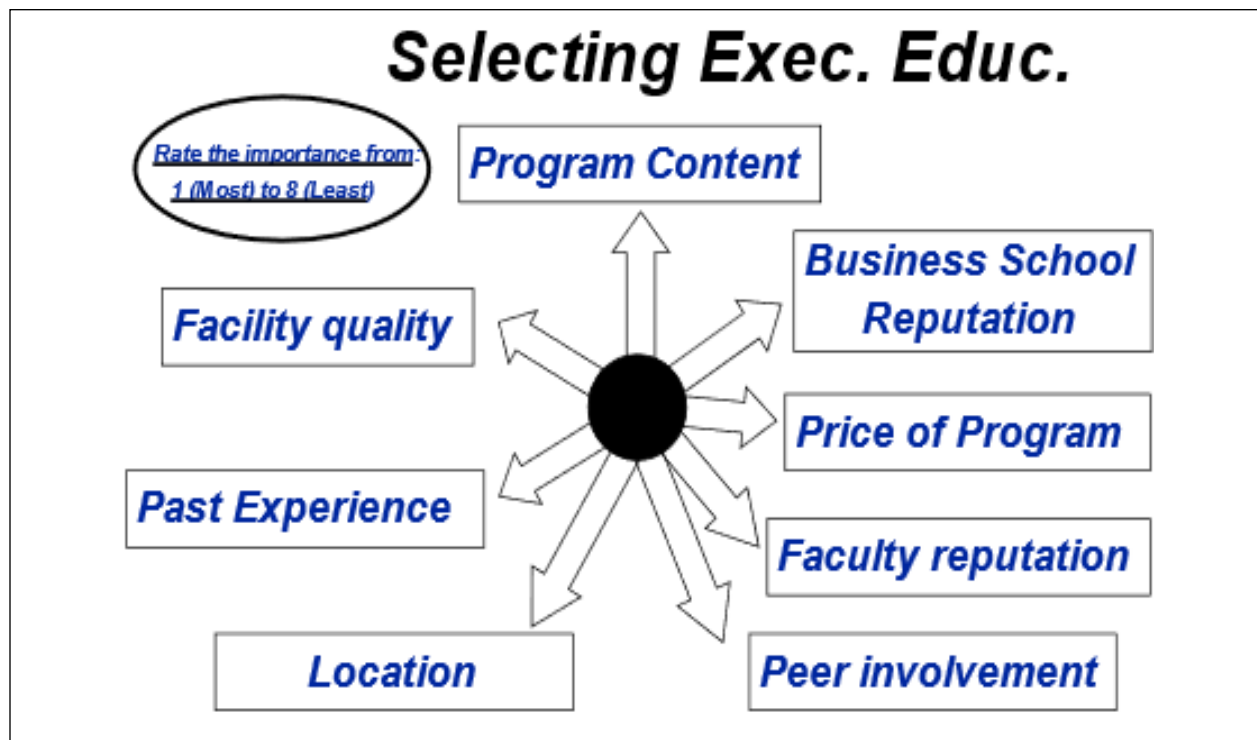
One interviewee ended the discussion on this question by saying, *“My response to this question is that we look at the whole system, not just the pricing. It is hard to pull out just one factor. Some of the most important are global, brand, and the most important to us, as I mentioned before, is understanding what we are trying to do.”*

4. What does your organization value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.

Please rank the items using 100 points – “larger the number = the more important.”

- A. _____ Reputation of the faculty
 - B. _____ Quality of the facilities provided for training –classrooms, food for breaks and meals, break out rooms, workout room, amenities, etc.
 - C. _____ Content of the program
 - D. _____ Location of the program
 - E. _____ Name and reputation of the business school
 - F. _____ Price of the program
 - G. _____ Peer involvement in the program
 - H. _____ References from others internally or externally
 - I. _____ Live Online offerings, self-paced programs, or Flex programs including a combination of both online and campus-based learning
 - J. _____ Program customization (creative or unique program approaches)
- _____ **_100_ Total of the above rankings will equal 100 – (some could be 0)**

One of the authors used this executive education partner exercise in Question 4 for 15 years with Boards, senior executives, potential clients, and corporate teams. When the original survey was conducted with eight questions, the preferences were always the same for the first three and the last two preferences. Sometimes with various audiences, results varied in the order of one, two, or three. Still, however, content, reputation, and faculty were always among the top choices, and price and location were consistently ranked as the lowest choices.



Previous survey results were consistent from the years 2006 to 2021.

Preferences in Selecting an Executive Education Partner

- 1) **Content of the program**
- 2) **Reputation of the business school**
- 3) **Faculty reputation**
- 4) **Positive past experience**
- 5) **Quality of the facilities**
- 6) **Peer involvement**
- 7) **Price of the program**
- 8) **Location of the program**

The above survey was modified for this research to reflect possible changes due to COVID-19 and the worldwide pandemic. Therefore, two additional questions were added to the original study, #I and #J, for a total of ten choices.

4. What does your organization value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.																									
Please rank the items using 100 points - "larger the number - the more important."																									
Client Interviewee Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	Totals
Summary of Client Responses - (Item scored using 100 points total)																									
A. Reputation of the faculty	25	20	0	20	20	10	10	0	10	25	10	20	15	10	10	10	25	15	20	0	10	0	0	5	290
B. Quality of the facilities -classrooms, food for breaks and meals, break-out rooms, workout room, amenities, etc.	0	10	0	5	3	0	10	0	0	0	0	0	0	0	5	5	0	0	0	0	0	0	0	15	53
C. Content of the program	25	20	20	20	10	25	20	25	20	25	30	20	10	25	20	25	25	15	20	25	0	25	35	5	490
D. Location of the program	0	5	10	0	3	10	10	0	0	0	10	10	10	0	5	0	0	0	20	0	0	0	0	0	93
E. Name and reputation of the business school	25	20	30	20	10	0	10	25	10	0	30	25	20	5	15	5	25	15	0	0	40	15	0	15	360
F. Price of the program	0	5	10	15	10	5	20	25	5	25	10	10	0	5	15	20	25	15	20	25	30	40	30	5	370
G. Peer involvement in the program	0	5	10	0	4	0	0	0	20	0	0	0	20	5	0	0	0	0	0	0	0	0	0	10	74
H. References from others internally or externally	0	5	20	0	10	0	5	5	5	0	0	0	15	15	5	5	0	0	0	0	0	0	0	0	90
I. Live Online offerings, self-paced programs, or Flex programs including both online and campus-based learning	10	5	0	5	10	25	10	10	5	0	10	0	0	10	5	20	0	15	0	20	0	0	0	10	170
J. Program customization (creative or unique approaches)	15	5	0	15	20	25	5	10	25	25	0	15	10	25	20	10	0	25	20	30	20	20	25	35	410
100 Total of the above rankings will equal 100 - (some could be 0)	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	2400

This revised aided survey sparked different rankings from the interviewees. However, when the answers were taken as a group, there was an aggregate consensus on the highest overall preferences from the list for Content of the Program, Program Customization, Price, Name, and Reputation of the School, and Faculty. While the two pandemic questions received reasonable ratings, the price choice dramatically jumped. Location, however, was still in the lower quadrant of preferences. This recent study suggests more attention be paid to program customization and price now than in the past for executive education programs.

With the addition of questions relating to the pandemic, nearly 50% of the interviewees assigned points to Live Online Offerings, and 94% assigned points to the Program Customization question.

LIVE ONLINE OFFERINGS



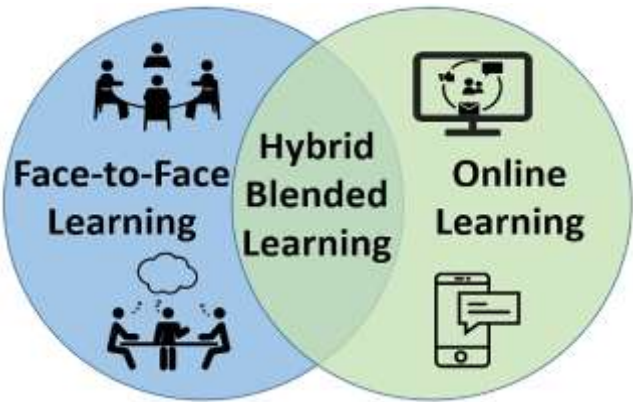
PROGRAM CUSTOMIZATION



4.a. From the list above, is there one particular item that is being valued more now since the pandemic?

Four interviewees said nothing specifically was valued more since the pandemic. This response was dramatically different than the other 13 respondents who noted that there had been a dramatic change with concern for Live Online, Blended, and Hybrid offerings and Program Customization. Many felt that while the lack of any online capability would be an immediate disqualifier in bidding for executive education business, it was strongly felt to be needed as another delivery option. The ability to travel is key to attending any face-to-face offering. If there is a company travel restriction, this limits the educational opportunities available which could delay the program, cancel the program, or look for some other alternative delivery method to offer. This could be through some form of blended or hybrid offering which would require a virtual component. Most interviewees noted this was a better option than waiting and just doing nothing in leadership or management development and putting everything on hold.

There were several ways that virtual training was referenced. Terms like self-paced programs, FLEX programs, online, hybrid, mixed, or blended were all used to describe alternative learning delivery methods.



Some comments related to both positive and negative experiences with virtual methods. This was primarily due to the faculty's ability to deliver effective online learning courses. One interviewee observed that *"In talking with some universities, when they say that their faculty are becoming more comfortable with online offerings, that translates to me that they are really struggling. Any comment like that is a red flag. Rather than being positive and supportive of the school's online learning platform, it's just an indication of what they achieved with it so far."*

The research noted that companies have become much more virtual in their operations. As a result, this has furthered the growth of online offerings and a combination of offerings involving some virtual segments and some face-to-face segments. There was not a question of whether on-campus executive education programs would return. It was more a question of a participant's ability to travel freely again and university restrictions due to the pandemic.

Finally, some interviewees had a direct recent experience with online learning and expressed their feelings about it in this way, *"My experience in doing virtual was live via Zoom, which offered good group discussions but not in the larger group. The next online one I did was a six-week asynchronous course. And the last one I just did last week was the one that worked really well. Two factors contributed to this: small class size and a marketing innovation class. Whenever you get marketing minds together, everyone has an opinion and likes to talk. The difference is when you get lots of engineers or operations people together, they often don't like to talk."*

Along with the comments regarding online came the endorsement of traditional executive education on-campus learning by stating, *"We are going offsite for our speaker training in December. We tried it virtually last year, but it achieved much better results by doing it in person. We came to the conclusion that being masked in the classroom was much better than being unmasked in a virtual program."*

5. Did your view of what was important during the selection process evolve or change once the program was offered?

Looking at all the replies, the answer to this question would be neither a Yes nor a No. A more appropriate response to the question was Somewhat. This had less to do with the selection process of the partner and more to do with the additional exposure to the content and the participant's evaluation of the program.

Another theme was the practicality of the course and being able to implement some procedures and methods as a result. This was noted as having faculty *"with real-life business experiences who can interject relevant stories and practical examples into their delivery so our participants can learn from them. This also includes choosing faculty who can enable engagement, facilitate discussion, and not lecture all the time. They have to balance practical and experiential with traditional classroom learning, which allows our participants to learn."*

Only during the delivery of the program, with various faculty members, and after the participant's evaluations are reviewed can the client get a real sense of receptivity and impact. This is when companies find that they need more flexibility to make changes in content, faculty resources, and respond to different organizational needs. In addition,

partnerships always become much more relevant when clients and vendors start working together. This is where the relationship between a university program and an account manager comes together with client representatives to resolve whatever issues exist – modifications in content or providing different faculty members to meet changing needs.

6. What advice would you give other companies looking to find the best university executive education partner or outside partner for their needs?

This question offered an opportunity for the interviewees to share their knowledge with their peers or others who ask for advice on what and how to pursue selecting the best executive education partner. It was a chance to reflect on what had gone right for them as well as areas they felt may have needed more attention. When looking for executive education, most organizations consider open programs for individuals and a custom program for groups of 15 or more participants. While there is no strict guideline of what constitutes the right number for a custom course, it is usually the total cost involved or the price per participant. Either way, companies are always looking for the best educational results at the best value.

In their answers, there were some common themes that many times resulted in sending out an RFP or RFQ to obtain inputs from different suppliers. If it was a niche request, the focus typically was directed at non-university providers. They could produce consultants with both a deep knowledge of the topic as well as current interactions with other industry companies. However, if it were for more general leadership or additional functional knowledge, as in the supply chain area, universities would be looked at in greater detail.

The most common themes for consideration were:

1. Thoroughly understand your issues and what outcomes you are looking to achieve.
2. Conduct a thorough search of providers to be considered.
3. Look to identify a final list of three possible organizations as a partner.
4. Meet personally, if possible, with staff and faculty to determine interaction, fit, and the alignment of values.
5. Get feedback from others on what their experiences have been with various suppliers.



In addition, many suggestions involved asking the right probing questions: *“does your program address x, y, z?”; “how do you address x, y, z?” “what direct experience do you have with?” do faculty have practical vs. academic experience?”*

Many of the comments centered around faculty which is the key component to any successful executive program. There were various good suggestions to be considered, like looking for teaching staff who are well known in expertise that is important to the company. There were also comments about teaching theory rather than the practical application of the theory.

And another interviewee suggested, *“Fully understand your needs and the level of employees you are targeting. Reputation becomes important when looking at Executive level partnerships, for example, alignment with our needs and an ability to translate these into relevant and engaging content. These programs are a huge investment in time and cost, so value and impact are always considered.”*

Finally, one comment was especially pointed and a good one for all clients to consider, *“Have an in-depth understanding of the follow-up process after the program. Some schools do it extremely well, others not so well, and some schools don’t do it at all. Our selection, after considering the three finalist presentations, was to go with the one who suggested using a virtual follow-up after the program for further engagement and reinforcement. The other two finalists, both well qualified, never mentioned anything about follow-up in their discussions with us.”*

7. Have you increased your engagement with new entrants or non-traditional providers in the learning market over the past 12 -18 months?

With 52% saying “No” and 48% answering “Yes,” the response to this question was a split in the engagement of new or non-traditional entrants in the learning market over the past year and a half. This was not surprising and understandable, especially during the pandemic when little was happening in the executive education space. However, several interviewees provided good examples of what they had and were doing to stay active with the changes occurring in the learning market. Most of these activities were based on many forms of virtual learning, as might be expected.

“Yes, sources that had better online learning offerings were who we worked more closely with to develop a better relationship. Surprisingly for us, some providers (universities) had good e-learning solutions that could be used directly.”

“We had already started earlier than COVID to engage with providers of hybrid approaches (due to our international set-up). Without this initiative and the constraints of the pandemic, we would not have been able to make the giant step we did in our expanded portfolio. It has helped us enormously until some normalcy returns to face-to-face campus offerings again.”



Research Request for UNICON Member Feedback

The authors collaborated on seeking inputs from UNICON member schools regarding answers to Question 4. An email was prepared and sent out selectively to UNICON schools. This generated a total of 15 responses. The objective was to determine the alignment or non-alignment of how UNICON members believed client interviewees would distribute their 100 points over the ten choices provided. The ranking of the Top 5 responses from schools were content, program customization, name and reputation of the business school, price, and reputation of the faculty. The lowest ranked choice was the quality of facilities.

4. What you believe clients will value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.

The objective of your input will be to determine how similar or dissimilar UNICON member thinking is to that of what clients believe is most important in a university executive education relationship?

Summary of UNICON Responses - (Item scored using 100 points total) - Ranked 1-10

School Response Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15		
C. ____ Content of the program	0	10	20	19	20	65	10	10	15	15	25	15	20	25	20	289	1
J. ____ Program customization (creative or unique program approaches)	30	0	15	27	10	10	15	10	10	40	15	10	15	15	20	242	2
E. ____ Name and reputation of the business school	20	10	10	19	20	5	25	10	15	10	10	15	25	10	13	217	3
F. ____ Price of the program	15	15	20	19	15	10	5	10	15	10	15	10	20	10	15	204	4
A. ____ Reputation of the faculty	0	10	15	12	15	0	15	10	10	15	10	20	0	15	13	160	5
D. ____ Location of the program	25	5	0	0	0	0	15	10	10	5	10	5	5	5	0	95	6
H. ____ References from others internally or externally	0	5	10	4	5	10	10	10	5	0	5	5	10	5	5	89	7
I. ____ Live Online offerings, self-paced programs, or Flex programs including a combination of both online and campus-based learning	10	15	0	0	0	0	0	10	10	5	5	15	5	5	0	80	8
G. ____ Peer involvement in the program	0	15	5	0	15	0	5	10	0	0	3	0	0	5	10	68	9
B. ____ Quality of the facilities provided for training –classrooms, food for breaks and meals, break-out rooms, workout room, amenities, etc.	0	15	5	0	0	0	0	10	10	0	2	5	0	5	5	57	10
____ Total of the above rankings will equal 100 - (some could be 0)	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	1500	

Questions 4 Comparison Data – Clients and UNICON Members

Another measure of the collected data was determining the alignment on answers to Question 4. Selected UNICON member schools were asked to determine how client interviewees would distribute the 100 points across the ten choices provided. It was a small perception sample with results that were quite revealing.

Executive Education Client Valued Relationships UNICON Member Schools



Client's Top 5 most valued in a executive education relationship

- C. Content of the program
- J. Program customization
- F. Price of the program
- E. Name and reputation of the school
- A. Faculty



UNICON schools Top 5 of what they think the clients will select as their most valued.

- C. Content of the program
- J. Program customization
- E. Name and reputation of the school
- F. Price of the program
- A. Faculty

The following are the answers from the 24 client interviewees.

4. What does your organization value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.

Please rank the items using 100 points - "larger the number - the more important."

Client Interviewee Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24		
Summary of Client Responses - (Items scored using 100 points total) - Rank 1-10																										
C. ___ Content of the program	25	20	20	20	10	25	20	25	20	25	30	20	10	25	20	25	25	15	20	25	0	25	35	5	490	1
J. ___ Program customization (creative or unique program approaches)	15	5	0	15	20	25	5	10	25	25	0	15	10	25	20	10	0	25	20	30	20	20	35	35	410	2
F. ___ Price of the program	0	5	10	15	10	5	20	25	5	25	10	10	0	5	15	20	25	15	20	25	30	40	30	5	370	3
E. ___ Name and reputation of the business school	25	20	30	20	10	0	10	25	10	0	30	25	20	5	15	5	25	15	0	0	40	15	0	15	360	4
A. ___ Reputation of the faculty	25	20	0	20	20	10	10	0	10	25	10	20	15	10	10	10	25	15	20	0	0	0	0	5	280	5
I. ___ Live Online offerings, self-paced programs, or Flex programs including a combination of both online and campus-based learning	10	5	0	5	10	25	10	10	5	0	10	0	0	10	5	20	0	15	0	20	0	0	0	10	170	6
D. ___ Location of the program	0	5	10	0	3	10	10	0	0	0	10	10	10	0	5	0	0	0	20	0	0	0	0	0	93	7
H. ___ References from others internally or externally	0	5	20	0	10	0	5	5	5	0	0	0	15	15	5	5	0	0	0	0	0	0	0	0	90	8
G. ___ Peer involvement in the program	0	5	10	0	4	0	0	0	20	0	0	0	20	5	0	0	0	0	0	0	0	0	0	10	74	9
B. ___ Quality of the facilities provided for training -classrooms, food for breaks and meals, break-out rooms, workout room, amenities, etc.	0	10	0	5	3	0	10	0	0	0	0	0	0	0	5	5	0	0	0	0	10	0	0	15	63	10
___ 100 Total of the above rankings will equal 100 - (some could be 0)	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	2400	

The following are the answers supplied by 15 UNICON member schools.

4. What you believe clients will value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.																	
<i>The objective of your input will be to determine how similar or dissimilar UNICON member thinking is to that of what clients believe is most important in a university executive education relationship?</i>																	
Summary of UNICON Responses - (Item scored using 100 points total) - Ranked 1-10																	
School Response Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15		
C. _____ Content of the program	0	10	20	19	20	65	10	10	15	15	25	15	20	25	20	289	1
J. _____ Program customization (creative or unique program approaches)	30	0	15	27	10	10	15	10	10	40	15	10	15	15	20	242	2
E. _____ Name and reputation of the business school	20	10	10	19	20	5	25	10	15	10	10	15	25	10	13	217	3
F. _____ Price of the program	15	15	20	19	15	10	5	10	15	10	15	10	20	10	15	204	4
A. _____ Reputation of the faculty	0	10	15	12	15	0	15	10	10	15	10	20	0	15	13	160	5
D. _____ Location of the program	25	5	0	0	0	0	15	10	10	5	10	5	5	5	0	95	6
H. _____ References from others internally or externally	0	5	10	4	5	10	10	10	5	0	5	5	10	5	5	89	7
I. _____ Live Online offerings, self-paced programs, or Flex programs including a combination of both online and campus-based learning	10	15	0	0	0	0	0	10	10	5	5	15	5	5	0	80	8
G. _____ Peer involvement in the program	0	15	5	0	15	0	5	10	0	0	3	0	0	5	10	68	9
B. _____ Quality of the facilities provided for training –classrooms, food for breaks and meals, break-out rooms, workout room, amenities, etc.	0	15	5	0	0	0	0	10	10	0	2	5	0	5	5	57	10
_____ Total of the above rankings will equal 100 – (some could be 0)	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	1500	

The results were very interesting. They show a tremendous amount of intuition, perception, and understanding on the part of UNICON schools knowing what’s on the minds of their clients for a good partner relationship. While the sample size wasn’t large, it was a good indication between what the client is thinking and what the university is perceiving. The alignment of this data was a pleasant surprise to the co-authors, who had hoped that the answers from schools would be closely aligned with clients. Whatever university process is being used, it is on target for interacting and responding to a client’s relationship needs.

Our research found a level of consistency in identifying, evaluating, and selecting the best executive education partner. There was continued importance to the program's content, the name and reputation of the school, and the faculty. However, there was a change in selection priorities after the pandemic. The two most notable differences were in the consideration given to program customization and pricing.

2005 – 2020	2021	2021
<p>Previous Survey Results - 8 selections</p> <ul style="list-style-type: none"> Content Reputation of School Faculty Past experience Facilities 	<p>Question #1 - Client Results using 8 selections (Less I and J)</p> <ul style="list-style-type: none"> Content Price Reputation of School Faculty Location 	<p>Question #4 - Client Results using 10 selections –100 pts.</p> <ul style="list-style-type: none"> Content Customization Price Reputation Faculty

When added to the original list, program customization was highlighted as the best way for clients to ensure that the material was most relevant to their participants. There were many references to information not being related to the client's industry issues or the participants' issues like working virtually and having to manage remotely. With customization, clients noted that while an additional investment in faculty tailoring of the content to fit the audience was required, it was worth the investment in value-added when back on the job. Companies have always had a value for money mindset but not to the degree noted by selecting the importance of price as a top pick in this report.

The concern about pricing has also come to the forefront with the individuals and organizations interviewed. There were several reasons noted. With the pressure on the steep fall in executive education revenues due to COVID, budgets have come under more scrutiny. This has not been missed on learning and development for executives, managers, and employees. As a result, many mentioned considering and using alternative learning opportunities with face-to-face programs either being put on hold by the customer or the university. Clients have now been exposed to more opportunities to remain at their location while taking advantage of online or live online offerings. While feedback received was mixed on receptiveness and effectiveness of these offerings, it saved companies on travel costs and time away from the job. And for the most part, it came at an overall lower cost. Pricing is interesting since it becomes an individual, organizational decision. But there was enough indication that it is more of a selection criterion for some than in the past. At the same time, some prices have gone up in executive education after the pandemic. Development, delivery, and material costs have gone up like any other business. This resulted from extreme margin pressure which dictated a line-by-line budget review. The outcome of that exercise, given the financial consequences of 2021, has been a price increase at many institutions.

The consensus of the most significant change for clients after the pandemic was in the area of virtual working, having most all face-to-face programs canceled, and having to consider online, hybrid, or blended programs. The intense feelings of the majority of clients were, *"Our learning from the pandemic was that we have now been able to add the capability to engage a geographically dispersed audience with digital technologies for digital learning and engagement."*

As far as the research findings on process selection and who makes the ultimate buying decision, not much has changed. Whether a corporate or line management program, most all decisions involve some committee input. These can be cross-functional or include executives in the line management leadership structure. Final corporate decision-making follows the rule of *"the higher the price, the higher the scrutiny and approval level."* Approval can also become elevated depending on the level of executives or senior-level management attending the program. Still, nearly 70 % said that the ultimate decision was at the CEO, President, Chief Human Resources Officer, or the Senior Management Team level.

An organization's decision can be strongly influenced by the CEO, President, Board member, or Senior Level Executive sponsoring the program. Limited cases were noted where a committee's recommendation was not accepted in favor of the compelling input from a key

influencer. However, it was acknowledged that most decisions were on a level playing field basis, with a final committee recommendation being accepted.

There were no strong opinions shared about a change in partner selection after the program was over. What was shared were three pieces of data. 1) the client developed a better understanding of the content once it was delivered, 2) seeing and hearing the faculty present and their method of delivery, and 3) the program evaluation feedback from the participants. As a result, this statement was made, *“We do a review of the program every time it is run. We have never dropped a university partner. However, we have had issues and had to work through them with university personnel. The most difficult was replacing a professor with great content who lacked real business experience and couldn’t interject relevant stories and examples so our participants could learn from them. Fortunately, none of these was ever enough to just drop a partner. Well, I guess I should qualify that by saying... Not as Yet.”*

Aside from what you might expect in the exchange of information between companies on looking for the best executive education partners, a key recommendation shared from an interviewee was to know exactly what issues you want to be addressed before the program and the client’s expectations after the program. Without this level of detail upfront, the executive education goals will be difficult, if not impossible, to meet.

While just over 50% indicated they had not engaged new entrants or non-traditional providers over the past 12 – 18 months, others were actively involved in looking at alternative educational solutions.

“We are always keeping our eye out on the modifications, recommendations, and changes in the overall executive education industry and with those of our preferred partner. It is just as important to understand what is going on in the area that serves us as they should be just as worried about what is going on in our company and industry. Our focus on online, blended, and hybrid has intensified as it represents another delivery option to be considered as needed.”

Conclusions and Implications

Given the research on *Selecting the Best Executive Education Provider: The Voice of the Customer*, client interviewees had significant interest in contributing to this topic. Their answers were insightful in providing an up-to-date view of how global organizations identify, evaluate, and select a partner. Executive education has changed since 2019, through the pandemic, and will continue to evolve into the future.

The Literature Review offered articles with thoughts and recommendations on this transition. Last year, a Harvard Business Publishing Education focused on *What Lies Beyond – The Future of Executive Education*. The subsequent article *Reimagining Executive Education* provided a roadmap detailing Reacting to the Pandemic, Redesigning the Future, and Reimagining what Executive Education can be (Swahney, 2021). This, along with other publications, provided a backdrop to the challenges and opportunities ahead for university and non-university providers.

The pandemic has caused a shift in partner selection criteria. While content, reputation of the school, and faculty are still among the Top 5, program customization and price were new entrants into the top choices. There were numerous reasons for this noted in the results. The authors’ recommendation for providers is to promote customizing and tailoring material with clients by offering relevant examples of what has been done for other engagements. This can be in online, live online, blended, hybrid, and face-to-face delivery programs.

Another recommendation is to build instructional design capacity as a part of your offering. Design capability can include full or part-time staff, contractors or consultants, or shared resources with other university or business school departments. In addition, with an increase in customization, faculty often need support to translate their teachings to a non-degree executive education audience. As the demand for customization increases and has become a top priority for clients’ buying decisions, providers should also consider upskilling their program staff in the principles of adult learning and program design. A customized learning resources guide can be created for executive education staff and faculty as part of this upskilling. As part of this resource guide, providers can include a variety of tools that assist in customizing content. For example:

- Interview guide for faculty/staff that prompts for successes, challenges, etc. and provides insights for customization
- Compilation of news articles, press releases, investor call reports, annual reports, etc.
- Executive summary of buyer’s strategy, leadership competencies, etc.
- Summary of program participants’ backgrounds

The Movement of Selection Preferences for Finding an Executive Education Partner

2005 - 2020	2021	2021	2021
Previous Survey Results 8 Questions	Question #1 Results using 8 Questions (without I and J)	Question #4 - Clients - using - 100 pts.	Question #4 - UNICON Schools using - 100 pts.
Content	<u>Content</u>	<u>Content</u>	<u>Content</u>
Reputation	Price	Customization	<u>Customization</u>
Faculty	Reputation of the school	Price	Reputation
Past experience	Faculty	Reputation	Price
Facilities	Location	Faculty	<u>Faculty</u>

University and non-university providers should be mindful that after the pandemic, clients were looking at the capability of the partner to offer more delivery options in the areas of online, live online, hybrid, etc. While it was noted that the lack of online, blended, or hybrid offerings might be a disqualifier by some executive education clients, providers should be prepared for the discussion. If organizations are investing in developing more virtual offerings, they will be better positioned than those not converting content to other delivery methods.

Many resources have emerged that provide best practices for teaching online and creating engaging online delivery for adult learners. The market is changing quickly, and education technology firms and learning experience platforms firms such as Emeritus, ExecOnline, Coursera, Degreed, and Linked-In Learning provide best-in-class asynchronous and synchronous content. An excellent way to learn about these platforms is to experience them individually or collectively with other team members. If you are a university provider, you may find that your school uses some of these platforms for employee development. Encourage your staff to participate in these opportunities, and sponsor them to attend programs by other providers to understand what is being brought to market.

The differences and selection criteria between university and non-university suppliers should provide good insights into how to consider positioning and presenting to an interested potential client or current client.

As in most businesses, successful competitors make it a priority to keep up-to-date on trends in leadership development and how providers are keeping pace. A review of other offerings, thought leadership information, and social media sites provide an understanding of perspectives, particularly regarding the identified top buying criteria. Paying attention to the trends in professional development and how a wide variety of providers respond to the changes helps top performers adjust their strategy as needed. On an annual basis, the co-authors recommend gathering executive education teams to explore these trends and review how university and non-university providers are reacting to market changes.

Since many provider selection choices come from committee involvement, it's always good to probe to see if this is indeed the case. If so, determine who is on the committee and what concerns each individual may have that can be covered in the proposal. Also, consider asking who makes the final recommendation and how executive education proposals get approved.

Doing as much pre-research as possible regarding the background of the senior leadership team and the Board can give an indication of the influence that may be present. This information provides insight into potential competitors and the positioning of a proposal.

Finally, staying current with new entrants in the marketplace, what competitors are offering, and keeping up-to-date on alternative delivery methods with continual technology changes, are requirements for remaining in an executive education leadership position.

In the list of choices provided in Question 4, the particular items that were valued more since the pandemic by clients were #i and #j. Looking at those from a provider's perspective will better prepare suppliers for any client conversation regarding these topics.

Additional Thoughts

Since 2019, the literature review looked at future proclamations from practitioners, schools, professors, freelance writers, independent instructors, professors, and consulting firms. As

our research has also shown, the reimagining of executive education will happen at a much faster pace than thought but a slower implementation than needed. Why?

1) Universities, but less with non-university providers, have a fixed, multi-million dollar investment or more invested in brick and mortar construction specially configured for executive living and learning accommodations. These brick and mortar facilities will not be easily reconfigured or disappear overnight. Unlike rented and leased space in areas where leases can be broken and occupants move out, most of these buildings are fixed assets.

2) The pandemic has given rise to more virtual offerings. These have been primarily aimed at managers, staff, and employees. Unfortunately, this educational transition has not always been the case in the board room and executive suite. While executives have become more accustomed to meetings using technology in place of face-to-face interaction, this was mentioned numerous times as not their preferred learning style. The primary differentiators for these senior leaders are reading, talking, listening, and decision making. As a result, their predominant education style is talking and networking with peers from other functions, industries, and countries in a setting conducive to executive learning. Until people cease to attend higher education for degrees in place of distance learning offerings, the “return to campus feeling” will not be lost on executives looking to develop and further their careers.

3) The primary learning vehicle is the outstanding professor who combines theory with practical applications for implementation back in the workplace. These faculty resources are now being asked to hone their skills in front of cameras or computers to deliver their material. Just as the best professors transitioned from the traditional classroom with students to executive education facilities with senior executive leaders, they will learn to transition to distance learning modalities. As required, teaching business professionals is much different from teaching younger attendees. Some can do it and are masterful at it. Others can't. This will be the same in the ability to covert or develop materials that are interactive, interesting, challenging, and fun for the learner. Again, some will perfect what is needed and be outstanding at it, and others won't.

Bottom line. Executive education will continue to evolve and improve by working more closely with global clients to know and understand their education requirements, formats, constraints, and future availability. This research paper provides the framework for continued and even better alignment by staying close to clients, understanding their needs, and offering creative and innovative solutions to become selected as their executive education partner of choice.



Executive Education 2021: FT survey shows what employers want



It was suggested by members of the Research Committee that the co-authors consider, if possible, the findings of the 2021 FT CLO report. This request was provided with the thought leveraging some FT results, if applicable, could enhance the depth of insight gained in the research for this project. In addition, referencing FT outcomes will enhance collaboration with a noted and reputable news organization in determining what CLOs and their organizations want in executive education both now and into the future.

In reviewing the FT survey in more detail, the findings for *Selecting the Best Executive Education Partner: The Voice of the Customer* corroborated many significant findings. The citations were as follows:

The FT survey notes, *“Business schools can take some comfort from the fact that just over half of the CLOs surveyed said they would turn to universities during 2021 for their executive learning programmes. However, a larger proportion pointed to alternatives: more than two-thirds said they would use internal resources, and nearly three-quarters planned to use non-university training partners.”*

The co-authors of this paper found a high level of interest in finding executive education solutions for what they wanted and when they wanted it. This is best summarized by the interviewee’s comments which stated, *“We have focused more on self-directed, off-the-shelf learning and gamification. We looked at other non-university providers and small, individual, well-known experts in their field. Some of these other resources are the ones that have come out of corporate, are cutting edge, are more relevant, and are more agile in their ability to customize. Some universities have operating constraints, and when that happens, the alternative for us is to go to someone who can make it happen sooner.”*

In the FT survey, when CLOs were asked to consider the most important qualities of training organisations with which they would work, they judged *“research-based and empirical knowledge — one strength of business schools — to be of little importance. They instead placed the greatest emphasis on the value of customisation and an ability to demonstrate return on investment.”* These were the same results from Question 4 with Program Customization and Price (Value for Money) as the two new selection criteria in the Top 5 for clients' expectations in an executive education partner relationship.

What makes providers relevant?

Qualities ranked by CLOs for importance (%)



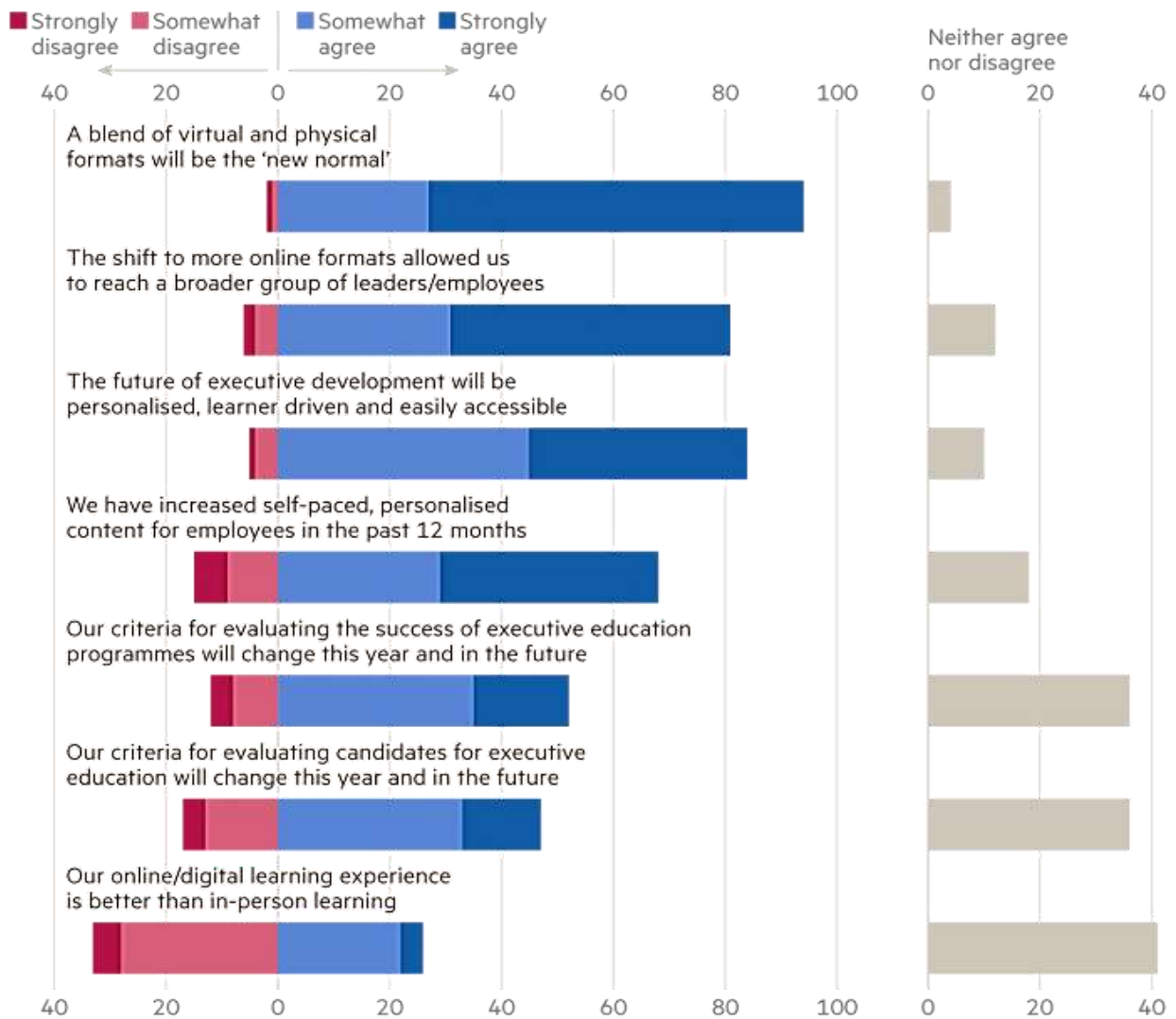
Source: FT research
© FT

The FT survey information showed movement to alternative delivery formats. *“Chief Learning Officers were clear that the hasty switch to online learning caused by Covid-19 lockdowns in 2020 had not been desirable, with the vast majority saying in-person learning was better. However, they were also realistic about the future: most predicted a blend of physical and virtual learning would be the new normal. Hence, last year an enforced move to online learning. While CLOs prefer in-person teaching, the shift brought benefits such as increased flexibility.”*

The co-authors found the same research finding and conclusion through their interviews.

The switch to online learning

What lessons have CLOs learnt? (%)



Source: FT research
© FT

The interviewees gave the same message to the co-authors, with online providing additional benefits. However, the executives' preference was still for face-to-face learning where they could network with other leaders from different global industries and countries. But many did concede that the future may hold more blended or hybrid offerings than seen in the past. As a result, this will give rise to shorter face-to-face programs with reduced usage of on-campus learning, dining, and housing facilities.

Appendix A - Literature Review



As part of our literature review, we examined multiple practitioners and academic sources with a particular focus on 2016 to 2021. As a result, we found three categories of information pertinent to selecting the best Executive Education Partner.

- The first category were articles, blog posts, and whitepapers written by the providers of executive education or aggregators. While these offerings are likely marketing materials for vendors, most are written to provide a point of view on what should be considered when selecting a partner or the common mistakes made when choosing a program.
- The second category of resources comes from industry associations, accreditors, or periodicals. These resources were more neutral in tone and consisted of conference summaries, independent research, or journalistic articles. They represented the opinions of buyers, providers, and learners.
- The third category of resources consists of research articles, academic papers, and consultant reports on executive education and leadership development trends.

We carried out a web search for articles and references to obtain additional background research information on *Selecting the Best Executive Education Partner: The Voice of the Customer*. Over 30 articles and prior UNICON research studies were reviewed. These were then evaluated for the most relevant to the paper's goals. The following search terms were used to conduct the search:

- *Selecting the Best Executive Education Partner*
- *Decision criteria for executive education programs*
- *Picking the best executive education partner*
- *Why do companies pick a non-universities partner?*
- *Which is best for executive education – a university or a non-university partner?*
- *Reasons to use a university for executive education*

The impact of Covid-19 has been significant for buyers, providers, and users of learning and development. Overnight, services to these stakeholder groups have changed. Providers shifted to live online delivery using technology. Learners readjusted their expectations for a learning experience and, in some cases, benefited more from a virtual delivery format. Buyers realized savings from eliminated travel expenditures. Everyone flexed and collaborated on providing a learning solution that addressed the needs of customers.

During this time, many of the recommendations noted in the previous decade of writings were accelerated and put into action. In the last 18 months, a new set of surveys, whitepapers, and research reports have explored the effects of Covid-19 on learning and development. Reimagining executive education, the future of executive education, and what employers want from executive education have been hot topics during this continued time of uncertainty. Organizations have re-engaged in their learning and development efforts, just differently. The uncertainty of how executive education will be delivered is on the minds of many stakeholders as the pandemic continues to impact travel and gatherings in early 2022.

Providers/Aggregators

Providers and Aggregators of executive education services release whitepapers, blogs, and marketing materials that provide commentary on how to select a vendor partner. Much of the output is geared toward an individual choosing an open enrollment program. Advice that is offered to buyers is categorized into the following areas to consider:

- Schedule and location
- School reputation
- Program content and mentors
- Global relevance

Other providers offer the questions you should ask when considering a partner. These include a list of questions regarding customization and off-the-shelf content, flexibility for implementation, links to academic institutions, and the results achieved. These reports provide good information for buyers considering executive education as a possibility. At the end of the reports, the sponsoring provider details their approach, which sets up the possibility for engagement.

Industry Associations/Accreditors/Periodicals

UNICON has sponsored independent research projects over the years to track trends in executive development. Over the last several years, UNICON has partnered with accreditors such as AACSB and other executive development associations such as EFMD to examine the changing landscape of executive education. These reports are helpful to buyers of executive education for several reasons. First, options to consider before purchase are outlined, along with trends that are happening. Buyers receive a view from their peers, often in a significant sample size. For example, in a summary of a UNICON conference, IEDP put forth the notion that lifelong learning would become more critical than ever before. This report discussed the trend in the practice of distributed leadership and flatter management structures. It then

is commentary for UNICON members and leadership about what they are seeing in their operations. The literature raises issues that are likely faced by both providers and buyers and offers the opportunity for discussions.

Trends in Executive Education

The executive education and leadership development marketplace has seen significant growth in the past decade. Over the last five years, many researchers, faculty, and consulting organizations embarked on academic papers, articles, and extensive research studies on executive education. For example, two faculty members, Mihnea Moldoveanu and Das Narayandas, have written a three-article series on the future of leadership development. This included the disruption of digital transformation and the impact of the supply landscape in academic settings. Both of these faculty members had an active relationship with their university executive education operations. Their papers outline a baseline of the changing needs of learning and development, the challenges that the current supply of learning and development have in keeping up with the emerging trends, and the impact of digital education. These papers were written before the pandemic, yet the predictions offered as emerging trends have largely occurred.

Other papers discuss the future of talent development and organizational culture, particularly as it relates to the employee experience. Reskilling and upskilling are topics surfacing in the literature, mainly in workforce development. Yet, as most reskilling and upskilling efforts are happening in technology jobs, many academic papers are beginning to explore this trend through the lens of business schools, particularly those partnering with educational technology firms.

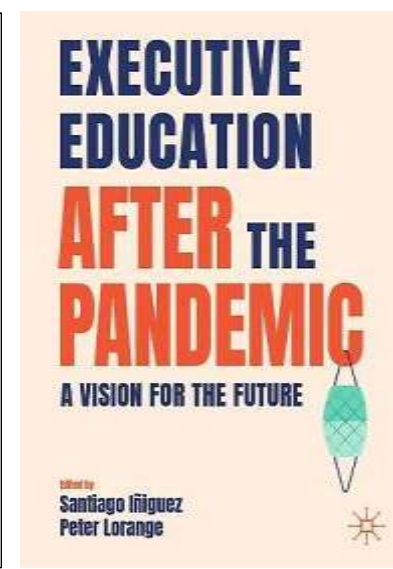
A new book of essays has been published looking at the trends in executive education following the pandemic. Contributors to the book include known disruptors of university-based executive education as well as faculty and leaders from non-traditional players. This book, *Executive Education after the Pandemic*, is a roadmap of the changes that have occurred or are in the process of driving the next generation of leadership development efforts.

"Since the first business schools opened in the early 20th Century, the corporate environment in which they operate has changed enormously. Today, market disruption and new demands on business - for sustainability, inclusion and diversity, integration of AI, etc. - have greatly accelerated this change. Arguably the business education sector has not kept pace with the rate of change. Then along came the COVID-19 crisis. A global health crisis that for business schools was also an existential crisis of collapsing revenues. Or was it perhaps an opportunity?"

In their new book, [Executive Education After the Pandemic](#), Santiago Iñiguez de Onzoño, Dean of IE Business School, and Peter Lorange, former President of IMD, are firmly on the side of opportunity. An opportunity and a catalyst for innovation and faster change.

Although sub-titled A Vision for the Future, the book does not offer a set prescription. Rather it presents invaluable insights, based on experience and real cases, from sector-leading executive educators and thought leaders, in the form of 32 individual essays, introduced and clearly summarized by the two authors."

Review by Peter Chadwick



Appendix B – Methodology Details for Research Process

A personal email was sent from the authors after identifying or receiving recommendations for interview contacts. The steps in the process were as follows:

Thanking them in advance and introducing the research sponsor, UNICON.

*“Thank you for agreeing to participate in the UNICON research project: Selecting the Best Executive Education Partner: The Voice of the Customer. UNICON, the **UN**iversity **CON**sortium, is a worldwide membership association of over 100 business school-based organizations whose colleges and universities are the global reference for executive education.*

The objective of this study was to enhance the understanding of how organizations identify, evaluate, and select a university-based executive education partner or a non-university-based partner (i.e., consultant or consulting firm) for their executive-education needs (i.e., CEO level and below).



2) **Sending an outline of the research steps and an advanced copy of the questions** for discussion. Many interviewees chose to fill them out and send them back making the interview much easier to facilitate.

“The research details are as follows:

- 1) *The seven questions to be asked will be sent to you in advance.*
- 2) *The contact will be by phone, Zoom, Skype, or in-person – or whatever platform you recommend that is most convenient.*
- 3) *The interview usually lasts about 30 minutes.*

4) Attached is the list of questions we will be discussing. Either please fill them out and send them back to me to guide the discussion, make notes on them, and/or just use them as a guide to what I will be asking you to comment on. The only question that does have to be filled out is #4." A highlight summary of the call will be sent after the interview is completed

3) The interviewer suggested a date and time for a follow-up interview call.

"Here is a list of potential dates and times to set up a call to discuss the research topic further."

4) **Creating and sending a summary of the conversation to the interviewee.** This enabled them to review and amend anything that needed refinement after the interview.



Appendix C - Co-author Bios



Patrick Cataldo, Ph.D. (Honorary)
(Pat)

Independent Consultant, Instructor, and Researcher

Pat Cataldo is an independent consultant, instructor, and researcher. He is the former Managing Director for Executive Development at UNC-Chapel Hill, where he currently serves as an executive education advisor and consultant for various clients. Prior to UNC, he was the Associate Dean for Executive Programs at Smeal College of Business for the Pennsylvania State University.

Before joining academia in 2004, Pat had extensive corporate experience with global Fortune 500 organizations as a Chief Learning Officer and the senior executive for customer training, employee education, and leadership development. He has worked in the telecommunications, retail, and computer industries for SAIC (Science Applications International Corporation) /Telcordia Technologies, Home Depot, and Digital Equipment Corporation.

He received an honorary doctorate from Grand Valley State University in Grand Rapids, Michigan, and has completed The Executive Program at the University of Virginia's Darden School of Business. In addition, he has an MBA degree from Boston College in Chestnut Hill, MA, and his undergraduate degree is in economics from Saint Francis University in Loretto, Pennsylvania.

Pat has been a consultant and/or an instructor for Liberty Mutual Surety, Chemtura, UNC – Charlotte, University of Texas, Sterling Capital, Englewood Bank and Trust Company, Aerotek, Major, Lindsey and Africa, Family Dollar, AAA Carolinas, and the Women's Council of Realtors.

Pat is a former Chair of the Board for UNICON (the UNIversity CONsortium - a worldwide membership association of over 100 business school-based organizations whose colleges and universities are the global reference for executive education) and an Emeritus Board Member. He is a former board member of the American Society for Training and Development (ASTD, which is now ATD (formerly ASTD) - Association for Talent Development formerly) and the National Society of Sales Training Executives (NSSTE, which is now SMT - the Professional Society for Sales and Marketing Training. ASTD has recognized him with the Distinguished Contributions to an Employer award and the International Trainer of the Year award.



Kelly Bean (Kelly)

Strategic Advisor, Program Director, Coach

Kelly Bean is a recognized expert in learning, leader development, and executive education. Kelly counts leading ventures within corporations and higher education institutions as the incubator for her one constant drive - her passion for developing others, their teams, and their organizations to grow forward.

Kelly has held Dean and CEO positions at four of the top global business schools, leading non-degree executive education at UVA Darden, UCLA Anderson, WashU Olin and WashU at Brookings, and Emory Goizueta. She is currently an Executive in Residence in Executive Education at the University of Miami Herbert Business School. She is the past chair of the Board of UNICON, a global consortium of executive education organizations, and previously served on the Board of ASCENT, an organization focused on the leadership development of multicultural women. Kelly recently joined Kepner-Tregoe, a global training firm, as an independent board member.

She regularly consults in personal leadership development, team effectiveness, organizational development, strategy formulation and execution, and talent management. She has worked with organizations such as Home Depot, AECOM, Panasonic, UPS, Princess Cruises, Sony, Farmers Insurance, Blue Shield Foundation, Coca-Cola, Westfield, US State Department MEPI, US Navy, NAMIC, Bacardi, Intercontinental Hotels Group, ABInBev, Centene, Nazer and other global firms to design and deliver leadership development programs.

She has also engaged with Yale, University College of Dublin, University of South Carolina, UCLA, UVA Darden, WashU, Rutgers, Bentley University, New York Institute of Technology, George Mason University, Pepperdine, University of Miami, and Emory to provide market entry strategies, executive education and degree teaching, and strategy and team alignment. Currently, she is advising three early-stage startups in the career and ed tech industries.

Kelly received her BS and MS from Moore School of Business at the University of South Carolina and is currently pursuing her doctorate in organizational leadership from Franklin University.

Appendix D - Acknowledgments

The Researchers were assigned a UNICON Project Sponsor and Co-Sponsor who would be responsible for overseeing matters pertaining to the Statement of Work. Those selected were current members of the UNICON Research Committee. The Sponsor was Melanie Weaver Barnett from the University of Michigan – Ross → and assisting Melanie was Co-Sponsor - Meg Regan from MIT - Sloan. We would like to acknowledge their involvement, help, and direction. The Co-authors also appreciate the time and attention they have devoted to this project.



We are grateful to the following UNICON members and their Schools who were willing to provide names for research interviews.



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University of Michigan
Ross School of Business

Eric Bergemann
Senior Director
Executive Programs
MIT
Sloan Executive Education



Mark Lewis
Executive Director
Executive Education
The University of Chicago
Booth School of Business

Alan Chen
Executive Director
Wharton San Francisco
University of Pennsylvania
The Wharton School



We would also like to thank Bill and Dan for their administrative assistance during the project.

Bill Scheurer
Executive Director
UNICON



Dan Collins
Webmaster
UNICON

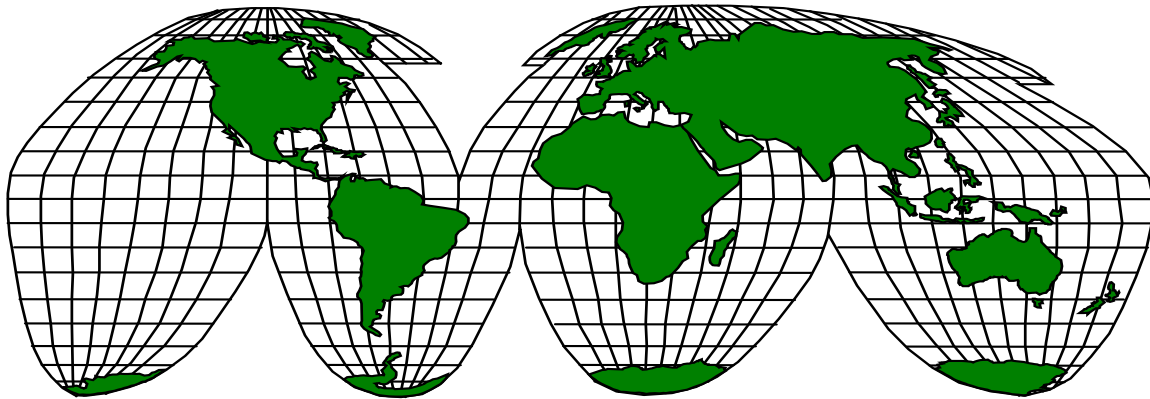
** Finally, the authors would like to thank the schools that participated in the research by providing answers to how the clients would allocate their 100-points in Question 4.



Case Western Reserve
CEIBS – China
Dartmouth – Tuck
Emory
FDC – Brazil
HKUST - Hong Kong
INCAE - Costa Rica
Insead - France

ITAM - Mexico
MIT – Sloan
UCD - Ireland
U Chicago
U Maryland
U Pennsylvania - Wharton
U Washington

Appendix E - Client Contributor Statistics



The Co-authors would like to thank the interviewees for their input on this research.

Interviews - 24

Locations - 12 States (CA, CO, GA, IL, IN, MA, MO, NC, NJ, NY, TX, and WI)
Seven Countries (India, Netherlands, Saudi Arabia, Spain, Japan, UK, and the USA).

Mix % - 58% from the USA and 42% from Seven Countries

Titles - Senior HR and Line Executives to Director of Learning and Development

Interviewees - Males – 62% and Females – 38%

The 21 Industries Represented in the Research

Industry size – Small (6), Medium (4), and Large (14)

- Aerospace
- Alcohol
- Audit, Tax, and Consulting
- Commercial Banking
- Computer Manufacturing and Services
- Computers and Information Technology
- Consulting
- Education Technology
- Education/Non-Profit
- Energy
- Family Business
- Food and Beverage
- Gas and Electric
- Industrial Manufacturing
- IT Consulting and Systems Integration
- Manufacturing and Distribution
- Medical Devices
- Multinational Conglomerate
- Oil and Gas
- Pharmaceuticals
- Telecommunications

Appendix F – UNICON Member Question 4 – What Will Clients Value Most?

Below is a copy of the one question sent to UNICON member schools for their feedback.

If you are a UNICON member or from a university executive education organization, you can answer Question 4. This will allow you to compare your responses to those of other UNICON schools that replied on how they believed the interviewees distributed the 100-points among the ten choices.

Please Use the Form Below for Your Answers

4. What do you believe clients will value most in a university executive education relationship? Please consider your answers before the pandemic in 2019.

The objective of your input will be to determine how similar or dissimilar UNICON member thinking is to that of what clients believe is most important in a university executive education relationship?

Please rank the items using 100 points – “larger the number = the more important.”

- A. _____ Reputation of the faculty
 - B. _____ Quality of the facilities provided for training –classrooms, food for breaks and meals, break-out rooms, workout room, amenities, etc.
 - C. _____ Content of the program
 - D. _____ Location of the program
 - E. _____ Name and reputation of the business school
 - F. _____ Price of the program
 - G. _____ Peer involvement in the program
 - H. _____ References from others internally or externally
 - I. _____ Live Online offerings, self-paced programs, or Flex programs including a combination of both online and campus-based learning
 - J. _____ Program customization (creative or unique program approaches)
- _____ **_100_ Total of the above rankings will equal 100 – (some could be 0)**

4.a. From the list above, are there one or two particular items that you believe clients will value more now since the pandemic?

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