

PACTSM Processes for T&D

MCD-liteSM

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Preface

The intent of this article is to define and describe MCD-lite, a deliberate, reduced/shortened version of the MCD process. MCD (Modular Curriculum Development) is the more traditional *training & development* (ISD) process of EPPIC's PACT Processes for T&D.

Performance-based
Accelerated
Customer-/Stakeholder-driven
Training & DevelopmentSM

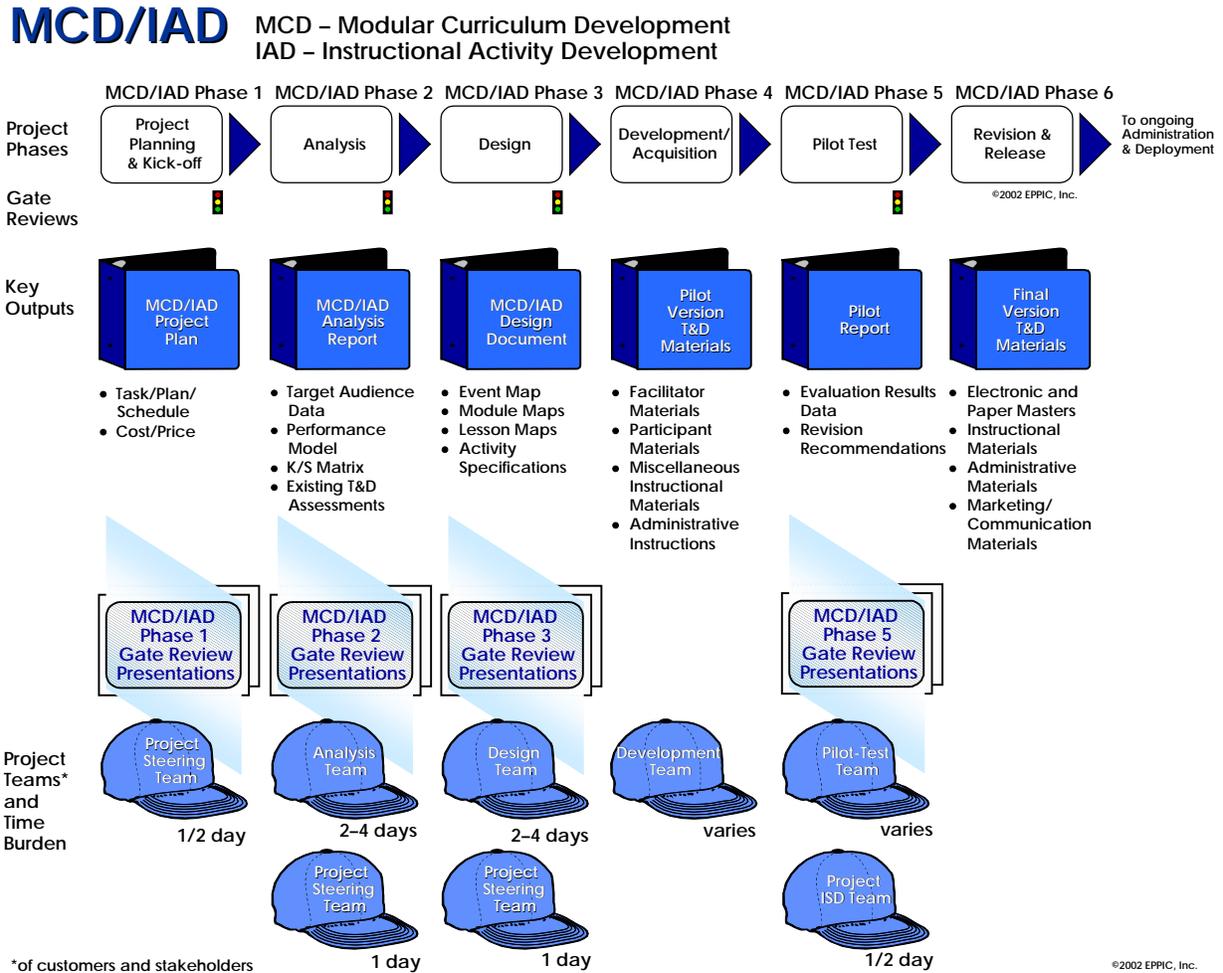
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While we at EPPIC believe in and mostly live *common processes* and have created, used, and licensed flexible, common processes for the business of developing and/or acquiring training & development (T&D), it is our consistent belief that *one size does not fit all!*

Knowing how to adapt any *common process*, designed for a standard situation or *sets of situations*, for application to other-than-standard-situations is sometimes very tricky. Usually it's the veterans of the standard process who can adapt best, for every common process project they ever attempted to apply the common process to most likely required some adaptation.

“Adapt or die” is a lesson they know is applicable beyond high school biology tests. One size, *enterprise common process or not*, does not fit all.

The standard PACT MCD approach to *lean-ISD*SM is represented by the following model.



While all of our projects are initially fitted into this conceptual and concrete model, the project’s unique specifics always require an adjustment, an adaptation. Always! Always! Always!

We can never merely *adopt* the standard PACT model for CAD and apply it successfully in each and every project! Never! Never! Never!

No ISD model or approach, PACT or other, can ever be so robust that it can be applied in a totally common method and be appropriate to every situation. We believe that would lead to “adopt and fail.”

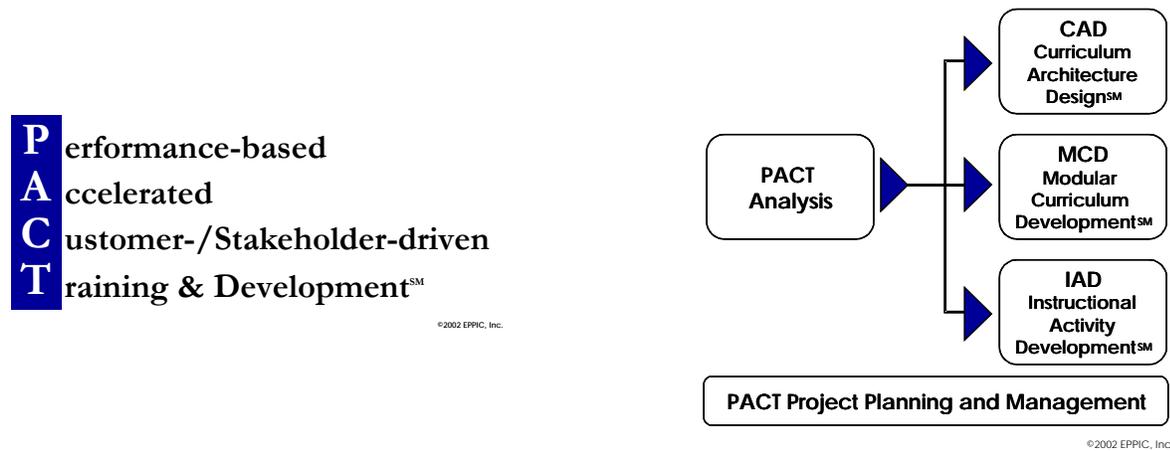
“Adapt or fail” and “Adopt and fail.” Words of wisdom and warning.

Background: CAD and MCD

EPPIC's PACT Processes for T&D are composed of three primary ISD design methodologies.

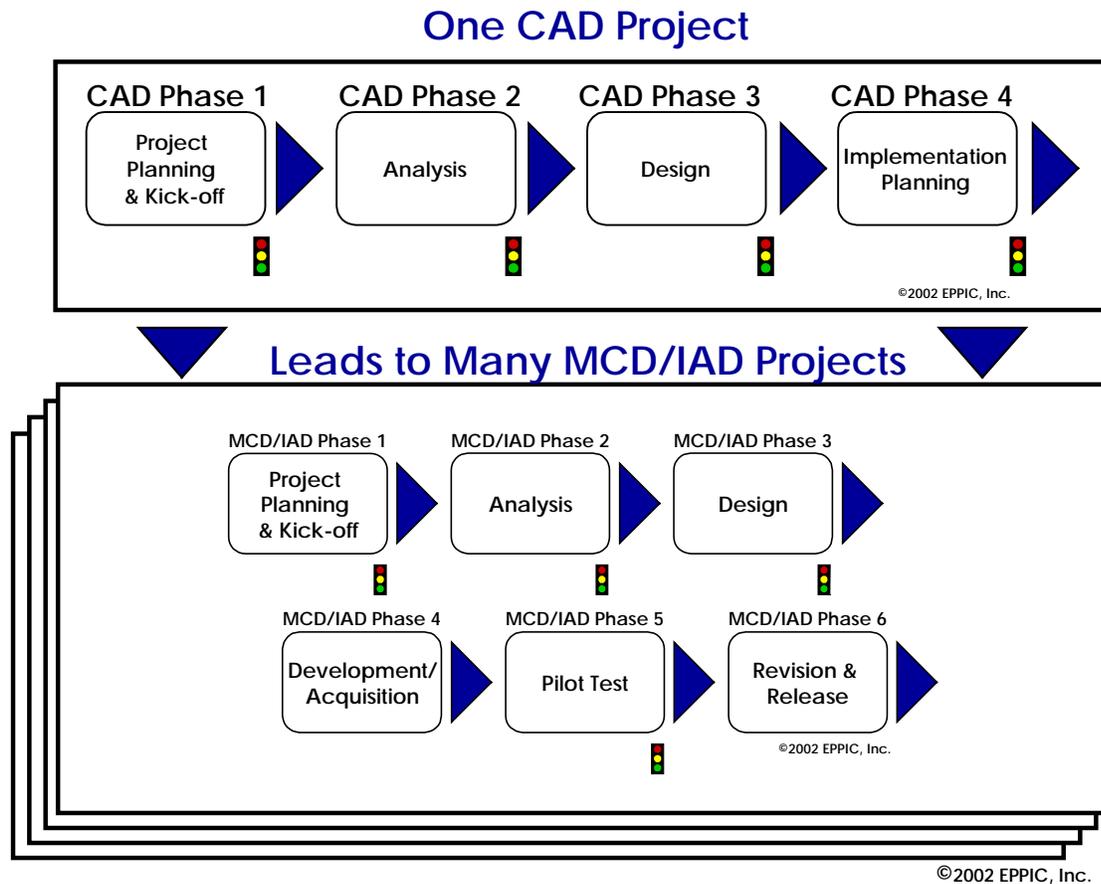
1. Curriculum Architecture Design (CAD)
2. Modular Curriculum Development (MCD)
3. Instructional Activity Development (IAD)

PACT is an acronym for Performance-based, Accelerated, Customer-/Stakeholder-driven Training & Development. MCD is EPPIC's equivalent of the familiar ADDIE model.



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In PACT, CADs lead to both MCD and IAD efforts. CADs uncover all of the T&D that *could be* (culminating in CAD Phase 3: Design), so that business decisions can be made about what T&D *should be*. Then the MCD/IAD effort ensues to develop/acquire the T&D that *will be*.



Most MCD projects will follow a CAD project and be able to leverage off the prior CAD's analysis and design outputs. However, not all MCD projects will be preceded by CADs.

CAD is the T&D *architecture* design process: a *systems engineering* approach to the T&D product line intended to

- Specify a suggested sequence or path of *performance-based* learning (T&D curriculum) for specific jobs or job families that will help learners and their management in planning what T&D to take and when. The "T&D Path" is simply a menu with a typical sequence given whatever safe assumptions could be made about the target audience's needs. Those sequences are created by a Design Team of master performers who typically know best what will work best in the real world. Learners and their managers will then *downselect* from the path all relevant T&D and finalize the sequence and timing to meet their local business needs.
- Reconcile all of the existing training into the total need and place them on the path in an appropriate sequence.
- Uncover all of the T&D that *could be* and then allow the customer, via a sponsoring Project Steering Team, to prioritize the gaps in the T&D product line identifying which of those gaps *should be* developed/deployed.

- Increase the use of shareable (where appropriate) modules of content, following specific rules/guidelines for modularity, thereby reducing first costs (via reuse of existing content modules) and life-cycle costs (eliminating/reducing deployment of redundant content to the same target audience and reducing maintenance costs via reducing inadvertent redundancy of content modules).

Once a CAD project is completed, the prioritized gaps in that particular T&D product line configuration (for a job or job family) can be addressed via MCD.

The intent of CADs is *never* to architect the entire T&D product line so that it can be totally developed or acquired.

The intent of a CAD is to create visibility for the customers and suppliers of T&D to concur on where future efforts and resources should be expended to meet the needs of the target audiences and their management, as driven by ROI (return on investment) and EVA (economic value added) considerations.

Therefore, MCD projects (as well as the CAD that may precede the MCD effort) are theoretically targeted at only high-payoff gaps. A Project Steering Team would not likely prioritize gaps that won't advance their business needs in meeting today's current-state challenges or tomorrow's future-state needs for T&D. Only those gaps that have sufficient ROI and EVA potential should be prioritized for MCD efforts in the final phase of CAD.

Since MCD projects are typically undertaken only on *business-critical* needs, they should not be shorted in their approach due to the potential negative, critical *impact* of having ineffective T&D for their target audience(s). For these business-critical type projects, MCD-*lite* is inappropriate.

The percentage of CAD T&D Events and Modules to be developed/acquired for each target audience (job or job family) should vary across the enterprise depending on the impact that that job/job family has on ultimate business results and metrics.

No job/job family should ever have a CAD done or MCD projects started because it's *their turn* or to be kept *even* with other jobs/job families. Shareholder equity is at stake and should only be invested where the returns beat all other enterprise ROI opportunities!

When to Use MCD-lite

MCD projects that follow a CAD effort have both analysis and design data that can be leveraged in the downstream efforts, based on the CAD gap priorities. *Leveraged* means that the efforts and cycle time can be reduced, but only if the CAD analysis and CAD design data is of quality: sufficiently detailed and accurate and appropriate.

Unfortunately, the Project Plan for the CAD may have been inadequate, poorly conceived, and *scheduled* but not *planned*. And there is a big, big difference between *scheduling* a project and *planning* a project!

In addition, the actual execution efforts in the CAD project could have been too rushed or just poorly done by the poorly guided teams by unqualified practitioners, and the overall quality of the analysis/design data could have suffered greatly.

Assuming that the quality of the CAD outputs/MCD inputs is not an issue *and the politics* of the content or project will not be an issue, then the MCD process might be shortcut a bit if needed.

But other factors related to the content itself are also determinants of going *full-MCD* or *MCD-lite*. We have done many MCD projects at EPPIC for our clients in the *lite-r* approach. In fact, our MCD projects are really combos/hybrids of *MCD-full* and *MCD-lite*!

We appreciate the need to go fast. And faster. But at some point on the journey you may begin to recognize that haste is making waste.

Maybe you should have checked the map before pulling out of the driveway eight hours earlier. If you took the wrong highway out of town because you were in such a hurry to “just do it,” then our motto of “go slow to go fast” might seem appropriate words of wisdom/warning.

The PACT MCD process was originally designed to be *accelerated* and fast, faster than traditional ISD approaches.

MCD is accelerated by involving the right people at the right times doing the right things and using common process steps and common templates to speed the effort. All MCD projects should be very much in control and very predictable in their schedules and costs. If not, the MCD project was probably poorly planned and/or poorly executed.

If the full MCD process, properly planned and resourced and executed, is already an *accelerated* approach to T&D/acquisition, then when would you/could you/should you go *lite*?

There may be some content prioritized in CAD that does not need all of the attention and support of the Project Steering Team in MCD, but that the CAD Project Steering Team still wanted addressed.

It may not seem as if some of the top-priority gaps of modules of the CAD pass the business-critical test, but it's their business consequences that are either rewards or punishments for their prior resource allocation decisions. It is, after all, a business decision, even for a learning organization!

Suppose you were going to “clone” an existing piece of training and make minor modifications for similar content: creating another batch of overviews of other departments in the various business units of the enterprise. You could probably assume that shortcutting would be safer here than if the content to be addressed was completely new and involved: federal regulatory penalties for inadvertent but typical screwups in reporting both complicated, hard-to-get data, and then the equally complex internal interpretations and issue resolution recommendations.

Jumping through all of the standard MCD hoops, plus some, may be the appropriate business response in the case of the latter.

But developing training content intended to only make people aware of a concept, or straightforward factual information delivered over the intranet, are less complex and less needful for the *all-hands-on-deck* approach of the Project Steering Team gate review meetings at predetermined milestones.

Examples of module content needing *full* attention versus *lite* attention are presented in the table below.

Module Content Examples	Full MCD Is Recommended	MCD-lite Is Recommended
Company Overview and Orientation (History/Values/Culture/Organization Charts/Etc.)	X	
Expense Reporting Policies		X
New Product Development Process Skills	X	
Materials and Tool Locker Checkout Procedures		X
Generic Spreadsheet Skills		X
EPA Regulatory Compliance	X	

How to Do MCD-lite

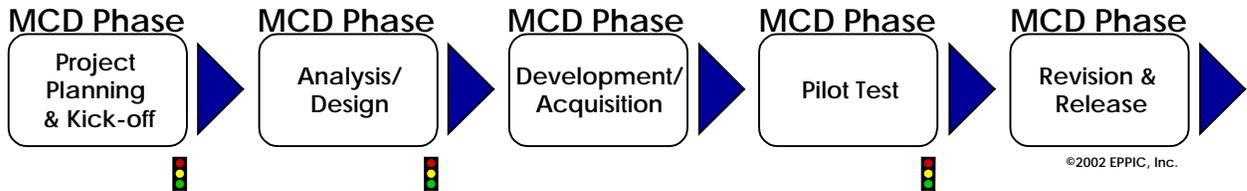
There are three types of approaches to *lite*-ning the MCD process, each with its own set of risks (to be planned for and then carefully managed!).

1. Combine the MCD phases for analysis and design.
2. Eliminate some or all of the Project Steering Team gate reviews.
3. Skip the Pilot Test Phase altogether.

MCD-*lite* can utilize one, two, or all three approaches. But be careful! Let's look further at each approach.

1. Combine the MCD phases for analysis and design.

The combo MCD Phase 2/3: Analysis/Design approach reduces the cycle time by eliminating the documentation and review of the analysis data in between the analysis and design efforts.



The risk is that errors and issues that arise during analysis cannot be taken to the Project Steering Team for resolution before continuing to the design activities and then building on bad data. This shortcut may cause rework (adding to both cycle times and costs).

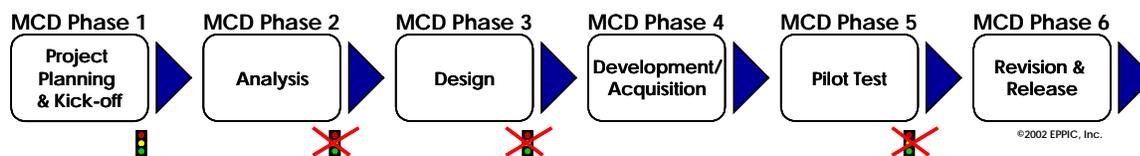
Is this likely to happen? How stable/solid/controversial/political is the content (topics or performance that the modules may address)? Will there be such issues? Will the designated members on the Analysis/Design Team be able to come to consensus by themselves, and will anyone on the Project Steering Team or elsewhere in the enterprise take exception to the consensus and send everyone back several squares?

2. Eliminate some or all of the Project Steering Team gate reviews.

The intent of the Project Steering Team gate reviews is to facilitate customer *command and control* in a forum where the supplier can also participate in the dialogue. This forum provides the supplier with a mechanism to get consensus responses quickly on the supplier's project-related issues/needs.

In an enterprise university, the supply-side includes all university staff, the university deans, and any strategic ISD partners/vendors of the university.

Customers include any of the enterprise employees brought in on Project Steering Teams, Analysis Teams, Design Teams, etc.



Most MCD-lite projects should have at least the first gate review so that a Project Steering Team can evaluate the business risks before deciding to forgo the rest of the potential gates, or to cherry-pick which one(s) they feel have business value.

These are business decisions that are generally best left to the customers and not the suppliers, with some exceptions.

It's the Project Steering Team members' (as customers) time we're talking about, and it's their people resources that will be expended (invested) in the MCD effort. They should decide whether or not it makes business sense to check in on the project from time to time.

Exceptions where less or even no gate reviews at all are needed are for those MCD projects where the content is not complex or controversial.

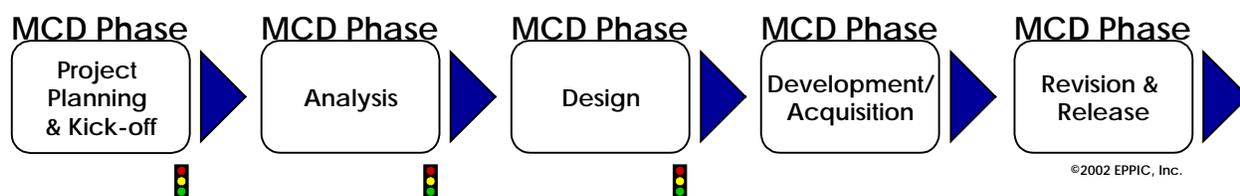
Some examples of that might include T&D focused on generic, enabling skills training such as word processing skills or spreadsheet skills. It is what it is, it is straightforward, and so a Project Steering Team isn't needed to guide the development/acquisition of the content. There is little return for their involvement.

3. Skip the Pilot Test Phase altogether.

The utility of the Pilot Test Phase as a quality check is most critical when the T&D is addressing a critical enabler for some high-payoff performance. But if the content is not complex or controversial, it may not warrant the effort and expense.

Some content should be developed/acquired and then published (in binders or to the enterprise's intranet) without all of the rigamarole of a formal pilot test. If there are issues discovered later, it was, after all, deemed no big deal by the Project Steering Team in the first place.

Again, you should typically hold at least the first Project Steering Team meeting so that the decision is a customer decision in the first place. Suppliers making this call can always be questioned later on it: a no win for either side.



The three preceding approach shortcuts for MCD-lite have to be thought through carefully. A “just do it” mentality can lead to a “haste making waste” result. Risk management with contingency planning is a must!

One can only make these shortcut decisions based on some level of experience with the MCD process in the real world, where big and little disasters from poorly advised shortcutting have been painfully experienced and lessons have indeed been extracted and learned.

MCD-lite Summary

Ultimately, the PACT Processes are designed to support the specific performance-based T&D needs of the enterprise and to reduce both cycle time and costs in doing so.

They are accelerated when properly planned, resourced, and managed to reduce both cycle time and cost. They emphasize sharing training content chunks (modules) within T&D products (events) where and when appropriate to reduce both cycle time and cost. And they promote more effective training by incorporating the right people at the right time to do the right things in an instructional systems design (ISD) effort that is driven by the performance orientation of the Performance Model.

The PACT Processes, including MCD-*full* and MCD-*lite*, produce T&D that is *performance relevant* rather than *nice to know*.

PACT Processes are intended to help enterprise management allocate effort (people and dollars) to T&D projects that have the greatest potential impact to performance and to ROI. Typically, those projects are not good candidates for the MCD-*lite* treatment.

However, if the content is stable, and there is little likelihood for controversy, and/or if the content to be developed is an extension of content that can be a potential “clone” from something that already exists and works (use of templates), it may make best business sense to consider the shortcuts described above for MCD-*lite*. But as always, it depends.

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