

From the Project Files of Guy W. Wallace...

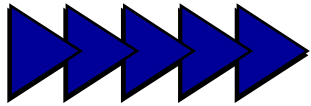
Project Planning and Management for ISD Projects

presentation to

Purdue's Educational Technology Program
Seminar Series
September 6, 2001

Guy W. Wallace
partner
CADDI, Inc.

Guy W. Wallace
is now accessible via
www.eppic.biz



Session Introduction

Performance Context

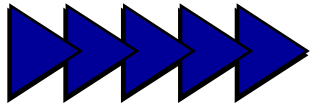
- ▶ As professional ISDers, you will occasionally have to plan and manage ISD projects

Session Objectives

- ▶ To provide you with an overview of my approach to ISD project planning and management

Agenda

- ▶ Open and speaker background
- ▶ Planning framework
- ▶ Planning concepts and models
- ▶ Plan structure and format
- ▶ Project teams and roles
- ▶ Project management philosophies
- ▶ Project management practices
- ▶ Q&A and close



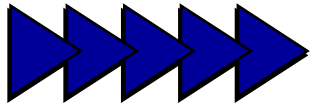
Speaker Background



Guy's professional biography can be accessed at www.CADDI.com/GWW.htm

Guy W. Wallace

- ▶ In the T&D profession since 1979
- ▶ A T&D consultant to government and industry since 1982 after two industry jobs (Wickes Lumber and Motorola)
- ▶ Clients in the last four years include
 - AT&T, Bandag, BankAmerica, Eli Lilly, General Motors, GTE, H&R Block, NOVA Chemicals, Siemens, and Verizon
- ▶ Involved in more than 250 ISD projects since 1979, many of which I've had to plan (*and price!*)



Details...details...details...details...details...details...details...details

- ▶ Plan at the most detailed level possible
- ▶ Think of/anticipate *everything*
- ▶ Leave “wobble room” between “key scheduled events”

Note:

Both God and the devil are in the details



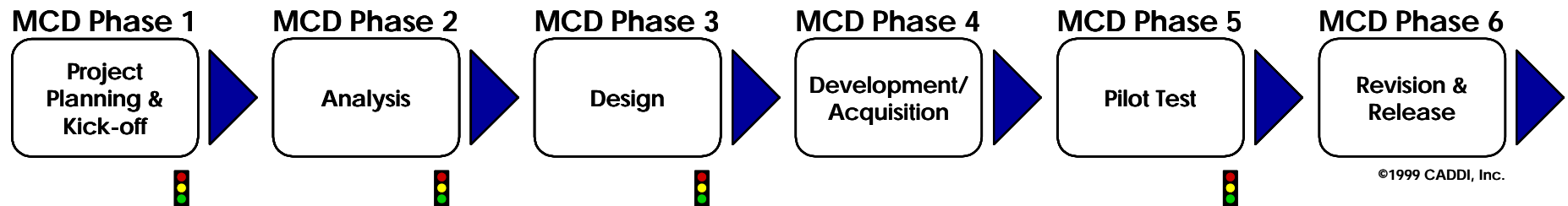
ISD Project Planning Framework

Use a "process model" for your planning framework

ADDIE . . . The Traditional ISD Model



CADDI's MCD

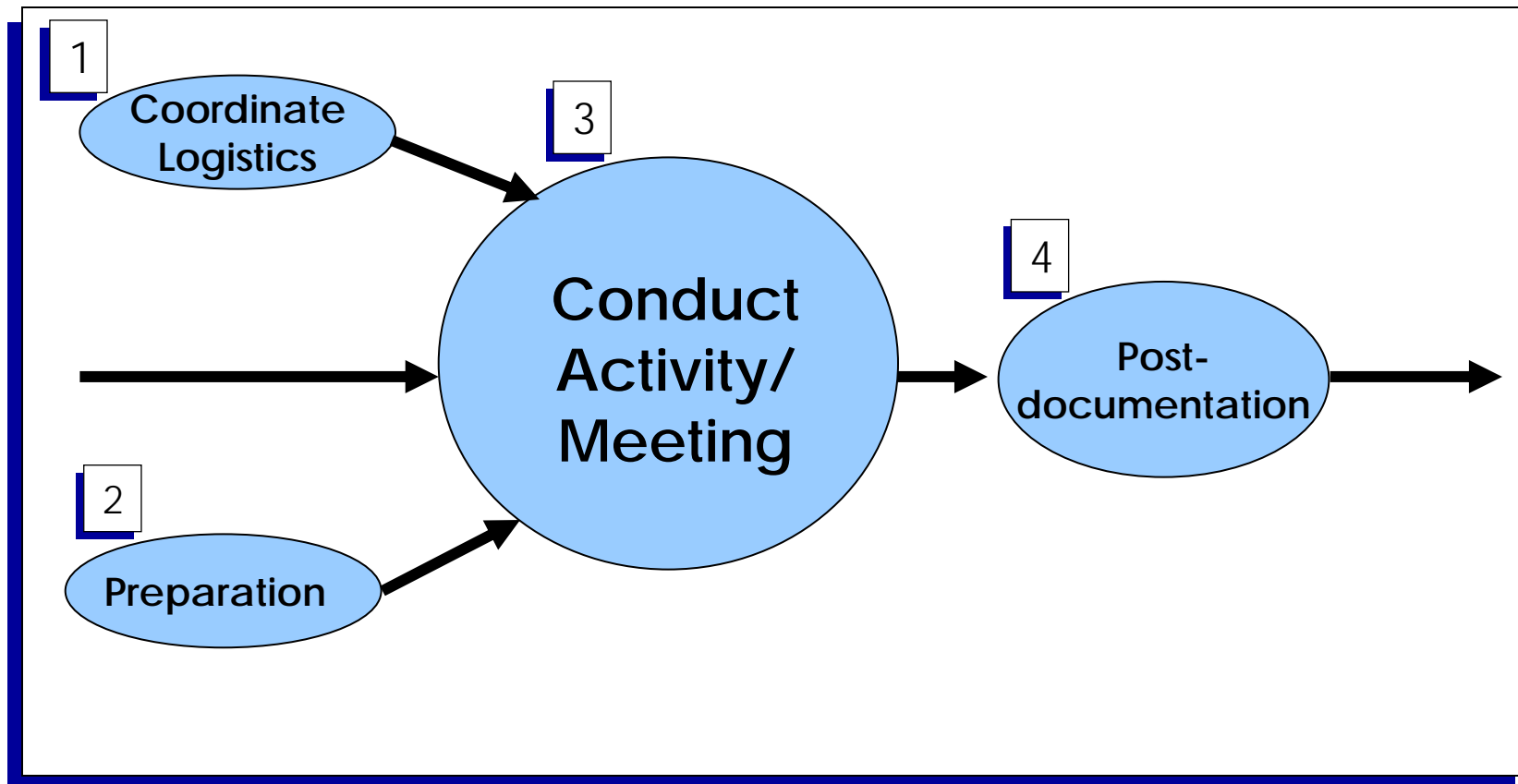


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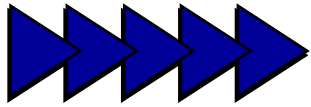
 = Project Steering Team gate review meetings

ISD Project Planning Concepts and Models

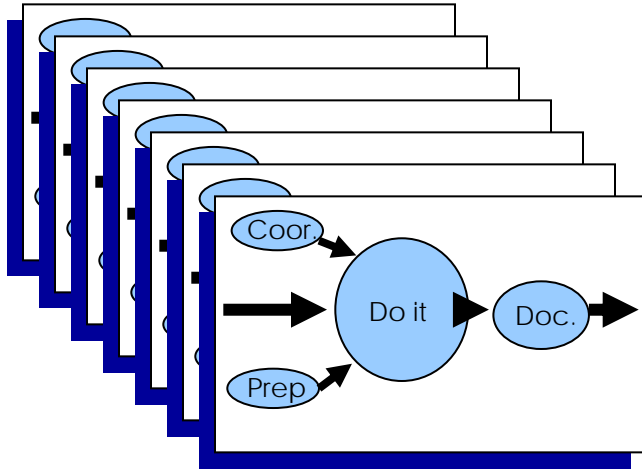
A “basic activity building block” for project planning



Four-part “activity block”:
1. Coordinate 2. Prep 3. Do it 4. Document it



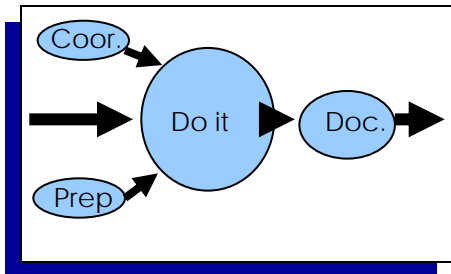
ISD Project Planning Concepts and Models *(continued)*



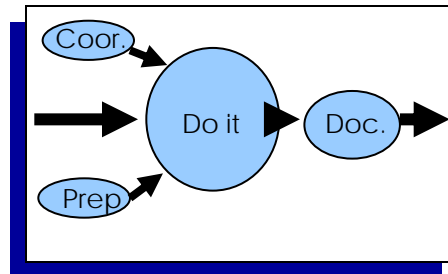
Build a chain of the “building blocks” for each phase of your effort

Example

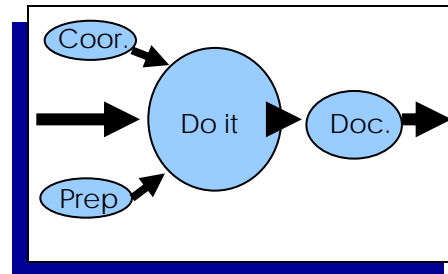
Conduct Interviews



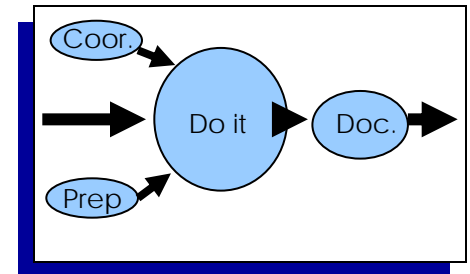
Conduct Observations



Conduct Analysis Meeting



Conduct Project Steering Team Gate Review



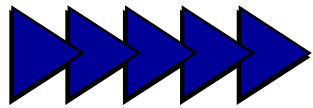
ISD Project Plan Structure and Format

Project Plan Structure

1. Purpose and goals
2. Background and rationale
3. Scope
4. Approach and methods
5. Project phases and milestones
6. Outputs and deliverables
7. Roles and responsibilities
8. Project tasks, roles, and schedule

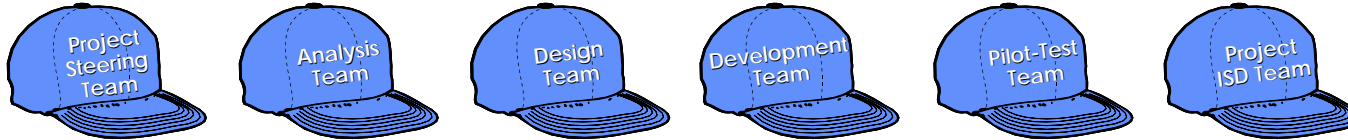
Project Plan Task Chart Format

Project Tasks	Estimated Days Required							Schedule			
	CADDI, Inc.			TMC Corporation				Start	End		
	GW	PH	PS	PM	PT	PP	Other (each)				
1. Identify, contact, and recruit three to five "Project Team" members for the Working Committee to provide input, critique, and support to the Analysis, Design, Development, and Pilot Testing effort	-	-	-	2.0	-	-	-				
2. Coordinate logistics for Task 4 <ul style="list-style-type: none"> • Room arrangements • Equipment arrangements • Invitations and information to attendees • Meal/refreshments • Final confirmation of invited attendees' intentions to attend 	0.25	-	-	1.0	-	-	-				
3. Prepare to conduct Task 4 <ul style="list-style-type: none"> • Meeting process design • Presentation preparation • "Straw" models/starter prototypes for use in Task 4 	1.0	2.0	2.0	-	-	-	-				
4. Conduct meeting	0.5	0.5	-	0.5	0.5	-	-	9/28	9/28		
KEY: <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <u>CADDI, Inc.</u> GW = Guy Wallace PH = Pete Hybert PS = Production Support </td> <td style="width: 50%; vertical-align: top;"> <u>TMC Corporation</u> PM = Project manager PT = Project Team PP = Pilot Participants </td> </tr> </table>										<u>CADDI, Inc.</u> GW = Guy Wallace PH = Pete Hybert PS = Production Support	<u>TMC Corporation</u> PM = Project manager PT = Project Team PP = Pilot Participants
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ISD Project Teams and Roles

Clarify responsibilities of

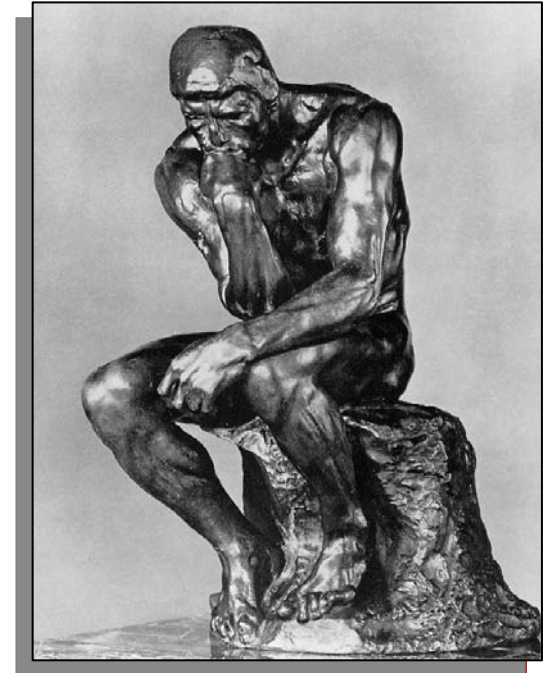


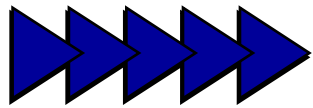
- ▶ Project champion and Project Steering Team (PST)
- ▶ Analysis Team(s) *and* Analysis Review Team(s)
- ▶ Design Team(s) *and* Design Review Team(s)
- ▶ Development Team(s)
- ▶ Pilot-Test Team(s)
- ▶ ISD Team

For details about the *responsibilities* of each role and team, please see the CADDI article "*lean-ISD*SM White Paper" on the CADDI Web site

▶▶▶▶▶ ISD Project Management Philosophies

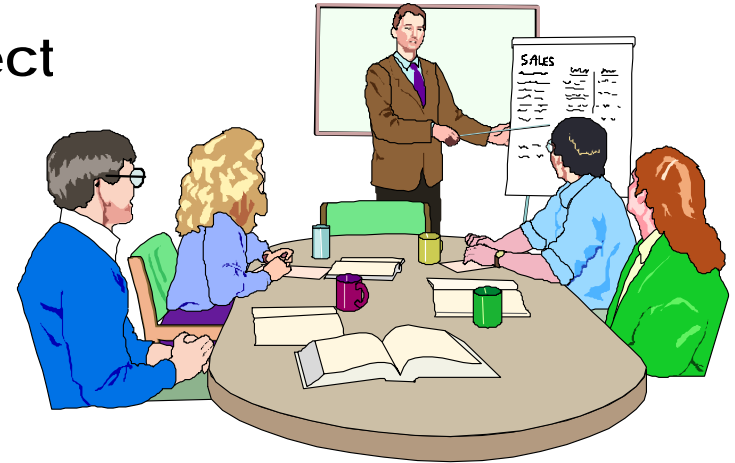
- ▶ Find the *right* project champion
- ▶ Work off a detailed, socialized Project Plan
- ▶ Find and sell the toughest skeptic(s) and include them on the Project Steering Team
- ▶ Allow *no* surprises for your customers/stakeholders
- ▶ Allow your customer to make all of the *business decisions*; T&D should make the *ISD decisions*
- ▶ Take *all* "bullets" and *no* "credits"
- ▶ Only work on projects with significant ROI

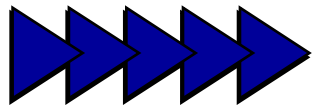




ISD Project Management Practices

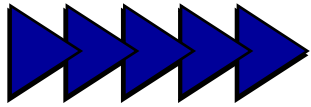
- ▶ Preview and presell the plan to the Project Steering Team
- ▶ Make the customer responsible for project success; they should
 - Establish the value/ROI for the project
 - Sanction/hold/kill the project (as appropriate)
 - Handpick all project participants
 - Review all interim documents throughout the project
- ▶ Use “gate reviews”
- ▶ Maintain constant communication with the Project Steering Team chairperson (or the individual charged with project management on the customer-side)
- ▶ Own the “process,” not the “content”





Session Summary and Close

- ▶ Plan in detail and detail the plan
- ▶ Use a “framework” and a “building block” concept/model
- ▶ Have a plan structure and format
- ▶ Partner/collaborate with the customer for planning, resourcing, and reviewing project activities and outputs
- ▶ Communicate, and then communicate more
- ▶ Own the process, not the content
 - There are more “business decisions” in an ISD project than “instructional design decisions”



Additional CADDI Readings/ References

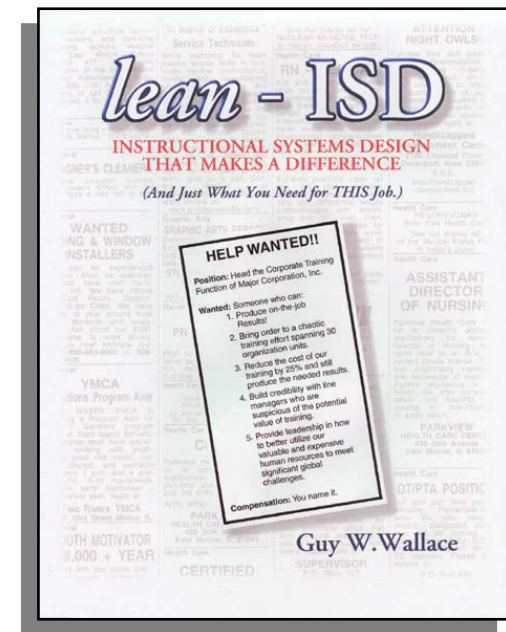
On the CADDI Web site

- ▶ "*lean*-ISD via the PACTSM Processes"
- ▶ "*lean*-ISD White Paper"
- ▶ "The Detailed Project Plan"



Other resources

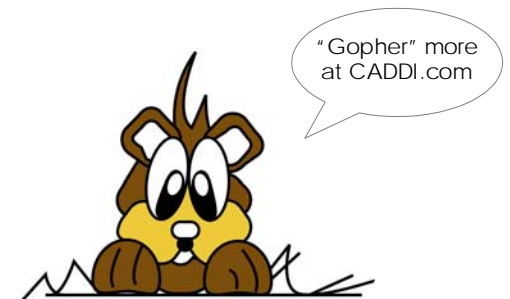
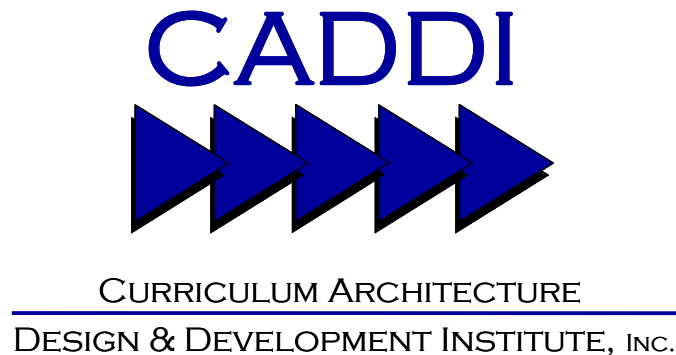
- ▶ *lean*-ISD (book)

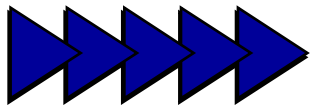




About CADDI

CADDI, Inc., the Curriculum Architecture Design & Development Institute, Inc., is dedicated to performance-based training & development (T&D) and other performance improvement interventions and methods





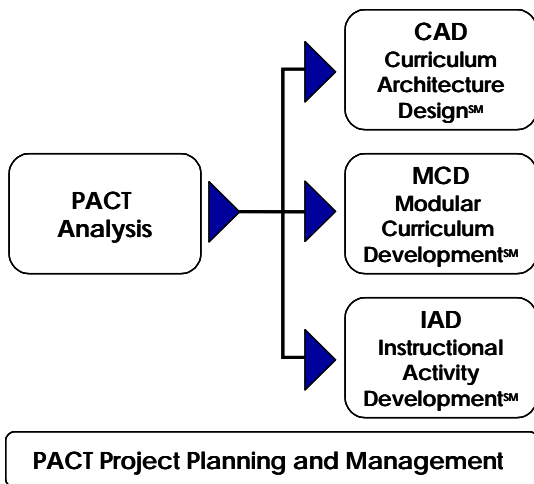
About CADDI *(continued)*

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CADDI's key models

PACT Processes for T&D

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



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T&D Systems ViewSM



Targeting EPPISM

Targeting Steps

- STEP 1** Map the Enterprise and its Systems/ Processes and Target Step 2 Efforts
- STEP 2** Map the Processes, Model the Performance, and Target Step 3 Efforts
- STEP 3** Derive the Enablers and Determine Gaps and Target Improvement Efforts

