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lean-Instructional Systems Design via the PACT<sup>SM</sup> Processes for T&D

THE CADDI NEWSLETTER

Summer 1999 Volume II, Issue 3

## A PACT PROCESS OVERVIEW

### *Project Planning and Management*

By Guy W. Wallace

If there are common secret ingredients in the recipe for successful Curriculum Architecture Design, Modular Curriculum Development, or Instructional Activity Development projects, they have to include well-executed planning and management at each step in the process.

We tell PACT practitioners to “trust the processes” for a reason. The processes are sound, flexible, and forgiving (within reason, of course). They also get results more quickly than other approaches to training design and development; that’s why we refer to them as “accelerated.” Tasks are grouped into a framework of “phases.” Review points (we call them “gates”) provide a built-in checking mechanism to ensure the project meets the sponsor’s objectives and that issues are handled in an appropriate and timely fashion.

But these PACT principles work only when planning and managing skills are employed. Well-applied principles of good project management will help bring the project to a quicker, less-expensive, higher quality conclusion. And there isn’t a single customer who won’t applaud those outcomes!

The PACT project manager actually has three broad project management responsibilities: planning, organizing, and controlling. Let’s look at these in more detail.



### *Planning a PACT Project*

At the end of World War II, General Dwight D. Eisenhower was asked about the role plans played in the success of the allied forces. His reply? “Plans are nothing. Planning is everything.” He went on to explain that, although the plans were important, the real value lay in the dialogue that occurred among all allied commanders and their staffs. Eisenhower saw the *act of planning* as the enabler to success.

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The PACT Processes include

**CAD** Curriculum Architecture Design  
*Systems Engineering of T&D Product Line*

**MCD** Modular Curriculum Development  
*New T&D Product Development*

**IAD** Instructional Activity Development  
*Development of Instructional Activities*

## *Inside*

- ▶ Guy Wallace reflects on an early project that convinced him that teamwork and T&D go hand-in-hand. Page 2.
- ▶ As any dedicated CADDI partner would, Kelly Rennels Smith conducts client research while on her honeymoon. Learn about a past project from the C-Files. Page 3.
- ▶ The list of CADDI’s consultant clients is impressive. Page 10.



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## Using Teams to Create T&D that Works for Even the Most Demanding Customers

By Guy W. Wallace



During one of my first training projects in 1979 for a building materials retailer, I had to work with several window manufacturing companies and our internal merchandising product manager to develop a video script that would lead to a video-based employee training and customer education program. The 15-minute video program, supported by a leader's guide and supplemental product literature and instructions, would be presented in three short segments.

- ▶ Basic product knowledge
- ▶ Installation procedures/techniques
- ▶ Materials and tools required for an installation

For this effort, the manufacturers would provide all of the funding. We in the training department would produce a training/sales piece that helped us sell their products by raising the knowledge levels of our employees and also softly selling the do-it-yourself customers on the need and use of the ancillary (and higher margin) items required to get the job done correctly.

After dozens of phone conversations and seven video script iterations, I became very frustrated. Each of my "customers" pulled the script in a different way. Each demanded that their favorite sales slogans be used and edited out each others'. Each person had a different view and a different agenda. I concluded that this was a no-win scenario, and the only way I would ever get

through this endless recycling adventure was to get them all in the same room and organize a process to force them to make all key decisions and select wordings they all could live with, even if that meant a meeting full of conflict and acrimony.

It did, it was, but it worked; and I became a proponent from then on for organizing my project constituencies and processing them through the nontraining design (content) decision-making. I could only lose on content decisions if I attempted to make them myself. I did not know the content that well. But I did know training.

I did not recognize it at the time, but I had inadvertently created a team. I didn't set out to create a team; I only wanted to end the pain of running the gauntlet over and over again. I wanted a group to take over the decision-making, and I wanted them to do it simultaneously. I empowered my team within boundaries; they owned the content decisions, and I owned the design decisions. I accepted even their poorer decisions because they were my "customers" (a.k.a. stakeholders) and it was really their program, not mine. I was just the hired gun to get the job done. I didn't own the program. They did.

I have been using this team approach on most of

*(Continued on page 9)*

## Supervisors College Receives Top Award

By Jennifer L. Corman

CADDI congratulates General Motors Corporation's MFD Tool and Die Supervisors College for winning the 1998 Chairman's Award!

The award, given by General Motors Corporation CEO Jack Smith, recognizes one of the "best of the best" global business initiatives in 1998 that has helped to move the business forward. Each division within General Motors, whether in North America or in other countries, has an opportunity to win the award.

The College received the honor for the structured recruiting process and the rigorous training and development curriculum that

prepares new supervisors for a very skillful and challenging job.

This is one of the few times the award has been won around a training initiative. The awards are usually from technical areas, according to James Ankton, manager of the College. Ankton said he believes this award is excellent recognition for the College and General Motors' commitment to training and developing their people.

CADDI partner Guy Wallace facilitated the CAD analysis and design meetings and several MCD combination meetings. ▶▶▶▶

# Governance and Advisory Processes Align T&D with Business Strategy and Needs

By Guy W. Wallace

In our spring '99 newsletter, we looked at the concept of *learning by design* from a systems standpoint: the leadership, core, and support processes that must exist for T&D to contribute to, not take from, the corporation's bottom line. Learning by design is about making informed, strategic T&D decisions and about getting certain stuff in control. It's not about controlling everything, only those factors that are critical enough to the business and to the business of T&D to warrant keeping in line.

Put another way, *learning by design is about serious training and development operations and about the business making serious T&D decisions in as rigorous a manner as all other critical business decisions are made, such as capital improvements.*

Our T&D Systems view consists of 12 interdependent processes (and lots of interrelated subprocesses). Some of these are found within the classic views of T&D organizations; others, like marketing and communications, are not always thought of as T&D Systems components. Each plays an important role in making the overall T&D system effective.



*Governance and Advisory processes help get T&D in control.*

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## A PACT PROJECT FROM THE C-FILES CIRCA 1995

# Fill-up Reminds Kelly of Merchandising Skills Program for Imperial Oil of Canada

By Kelly Rennels Smith

I was recently in Jamaica for my honeymoon when the tour bus Steve and I were on pulled into an ESSO station for a fill-up.



The station's convenience store caught my attention, not because convenience stores in gas stations usually intrigue me, but because I was curious to see if it met the retailing standards

developed in the ESSO Merchandising Skills Program—a PACT project of 1995 vintage. If it did, I reasoned, I should recognize certain products, their locations in the store, and how the promotion “salesware” was displayed.

## Background on the Project

Imperial Oil believed that if their retailers used successful merchandising skills and complied with the company's retailing standards, their retailers and the company would be more profitable.

At the time of this MCD project, Imperial Oil was ready to roll out its new 1996 retailing standards to an audience of more than 900 retailers and territory managers. Our client wanted to provide training to ensure that its retailers and territory managers knew and understood the value of the new standards and how to apply them to their stores.

*Imperial Oil was ready to roll out its new 1996 retailing standards and we were going to help.*

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## Update on CADDI Projects

*CADDI clients  
are applying  
PACT Processes  
in a wide range  
of business  
settings.*

### *Siemens Building Technologies, Inc.—Landis Division*

Pete is working on an MCD project to develop training for sales engineers on applying and selling their primary product line. We are in the Development Phase and have a pilot scheduled for late July. Currently, we are developing lesson materials and simulation Datapaks, and Mark Bade has come in to develop a one-day lesson on computer networking. The biggest challenge is graphics—our production staff is hard at work pulling in and modifying digital images from a number of sources, including existing training, catalogs, drafting software, and clip art.

Kelly is completing the development of a week-long class on *Selling the Best Total Solution (BTS)*, Siemens' approach to selling their customers customized solutions that meet their unique needs with one or more products or services offerings from their vast portfolio. This MCD project includes three in-depth simulations that help participants apply BTS to different parts of the sales process. The pilot is set for mid-July.

In addition, Kelly will begin the Design Phase of an MCD project later this month on a Performance Contracting course. She will also conduct a one-day process mapping meeting of the service-side of Siemens business that will serve as input as Siemens acquires new software to support these processes.

We also began a new project that spans a new business unit (for CADDI) within the Siemens organization. The Staefa group will be using CADDI to help with three related efforts. First, identifying near- to medium-term changes needed for the existing training to support their aggressive growth plans. Second, designing a curriculum architecture to support training needed to support the introduction of an entirely new product line. Third, developing the key training within that curriculum architecture. Pete began the project with a team meeting to identify potential improvements to existing training and an action plan to support the improvements. The other two projects will begin soon and continue into late next year.

We also completed a 1-1/2-day learning event called *Developing Your Sales Team* that was presented to the company's sales managers by sales training manager George West. The program introduced Siemens' structured approach to development—based on CAD and MCD projects we've worked on with George and others.

We have recently completed a project to design a comprehensive training program to provide fundamentals on the company, its HVAC technology, and the business environment in which they operate. Pete presented the design and a detailed development plan to the Project Steering Team to complete MCD Phase 2/3: Analysis/Design. At this point, CADDI's role is complete. Next the client team(s) will conclude the project by developing and testing the program, which will consist of computer-based; classroom; and structured, on-the-job training.

### *Imperial Oil*

This small project is a chance to revisit work done earlier for Imperial Oil to develop a CAD for their retailers. They have been executing their "three-year build plan" developed for the previous curriculum, and it is time to look for potential new challenges or changes due to shifts in the business. Pete had a chance to see what they have done with the curriculum and where they are going when he conducted a modified implementation planning meeting earlier this month.

### *General Motors University*

We continue to assist GMU in developing the capability and capacity of their strategic T&D vendors. CADDI is certifying two local individuals within that supplier community, Cathy Martin and Ric Byham (pictured on the next page) to Level 4 in Analysis, CAD Design, MCD Design, and PACT Project Planning and Management. This means they can deliver the CADDI PACT Process workshops, coach and certify others to a Level 3 (able to go solo), and be called in to support the really tough projects. They have already achieved the Level 4 in Analysis. Our congratulations (and condolences).

*(Continued on page 5)*



## Update on CADDI Projects *(continued)*

*(Continued from page 4)*

Guy is working with GMU strategic supplier, Brian Blecke, to support Mike McEnaney, GMU Dean of the Brand College, in a CAD project (CADs are referred to as Modular Curriculum – MCs – within GM) focused on members of the brand management teams. The brand team works with the engineering community, which designs the vehicles and manufacturing processes with their voice of the market inputs, as well as the marketing promotions world (advertising, trade shows, etc.) to promote and sell the vehicles brought to the market.



Cathy Martin

Ric Byham

Guy and Brian finished the design, and Guy will be taking the North American version to Germany in early August to adapt the modular design to the needs of GM Europe.

### ***Eli Lilly and Company***

We completed a CAD for district sales managers that was very well received at a recent conference of

sales training managers who are responsible for the rollout of modular T&D Events to a global population. The CAD project allows Lilly's global marketing and sales training to reuse elements of prior CAD-based T&D development efforts. This will save on current development costs as well as future life cycle update costs. Then for additional audiences, they will be able to significantly reduce additional first and life cycle costs for development of the same/similar content.

We also conducted a new CADDI workshop on "Curriculum Management." This workshop, customized for Lilly's needs, addressed the new paradigm view of T&D as systems and processes, and the roles and activities/deliverables of curriculum management, including the subroles of market management, product management, and distribution channel management.

### ***Bandag, Inc.***

Guy completed the postpilot updates for Bandag's Material Flow workshop, which is based on Theory of Constraints/Synchronous Flow concepts and models as they are used in Bandag dealers' specific manufacturing processes. The second delivery, which included an expansion of manual tools to support gathering prerequisite business operations data gathering, went very well, even better than the pilot. The final touches will be made in the next few weeks. ▶▶▶▶

*Curriculum Management, a new CADDI workshop, was piloted with Eli Lilly and Company.*

## Coming Up in September and November

Pete Hybert and Kelly Rennels Smith, along with our clients Mark King and Dennis Smith of The Landis Division of Siemens Building Technologies, Inc., will present

*Accelerated Time to Performance:  
Faster New Employee "Spin-up" through  
Performance-based Qualification*

ASTD Tech Knowledge Conference  
September 14-19, 1999  
Minneapolis

Michigan Chapter of ISPI  
November 18, 1999  
Detroit Area

## A PACT PROCESS OVERVIEW

### *Project Planning and Management (continued)*

*(Continued from page 1)*

What is needed from the project manager as he or she begins planning a PACT project? The project manager must determine the client's situation, needs, desires, and constraints. Most ISD professionals have a method for doing this.

Typically this will include face-to-face interviews with the client and others who are or will be part of the project. Questions might include

- ▶ Who is/are the clients (names, titles, organizations)?
- ▶ Who are the potential sponsors (names, titles, organization)?
- ▶ Who are other key stakeholders?
- ▶ What specifically is the problem or opportunity (who, what, where, when, why regarding the symptoms)?
- ▶ Is the solution being prescribed by the client?

These questions are just the tip of the project iceberg and represent only a sample of those included in the PACT Process Client/Stakeholder Interview Guide. Whether you use CADDI's questions or develop ones on your own, the key to asking the right questions is to begin with the project endpoint in mind and then work backward to get all of the possible information (and insight) you can. There are no stupid questions, only stupid timing. For example, two months into a project is a bit late to ask the client what business issues she is trying to solve. Don't be afraid to ask the questions early.

#### *Beyond the Background*

Once this background information is in your hip pocket, it's possible to begin the actual project planning. Here is where the project manager must

- ▶ Define the tasks needed to achieve the project objective.
- ▶ Assign tasks to the right project participant.
- ▶ Estimate the time required for each task.
- ▶ Estimate the cost associated with each task.
- ▶ Schedule the tasks.
- ▶ Designate milestones by which to measure progress.

Obviously, this is planning work the project manager can do in the privacy of his or her office probably between the second and third cups of coffee on a Monday morning.

Oops. Not quite.

Planning is both a "heads-down" activity—carefully thought through details and relationships—and "socialization" of them with key stakeholders, customers, and supporters. It's the socialization that creates (or *forces*) dialogue. And dialogue generates synergy and buy-in. Put another way, "Good planning produces good plans." Remember Ike?

PACT projects always include a Project Plan that sets out the project's

- ▶ Purpose
- ▶ Background and rationale
- ▶ Process
- ▶ Key outputs
- ▶ Scope
- ▶ Approach description and phases
- ▶ Phase by phase overviews
- ▶ Detailed deliverables
- ▶ Roles and responsibilities
- ▶ ISD practitioner credentials

Much of the groundwork for the Project Plan has already been done: it's embedded in the PACT Processes themselves and can be generated from standard "boilerplate" that the project manager adapts to the specifics of the current project. For example, CAD and MCD processes include predefined tasks and assignment lists. Using these templates as starting points reduces the need to create a plan from scratch, standardizes project formats, and helps eliminate inconsistencies between projects.

#### *Getting into the Details*

Two factors influence (or perhaps *drive*) decisions by PACT customers: cost and schedule. The savvy project manager knows this and rigorously develops time and cost estimates using project-specific task lists. (If your company has guidelines for allocating labor and other resources, we encourage you to use them.)

We've learned from experience that detailed estimates pay for themselves in three ways.

- ▶ They help define the real scope of a project. From 30,000 feet, almost any project looks smaller than it really is. But from ground zero,

*(Continued on page 7)*

*The key to asking a client the right questions is to begin with the project endpoint in mind and then work backward to get all of the possible information (and insight) you can.*

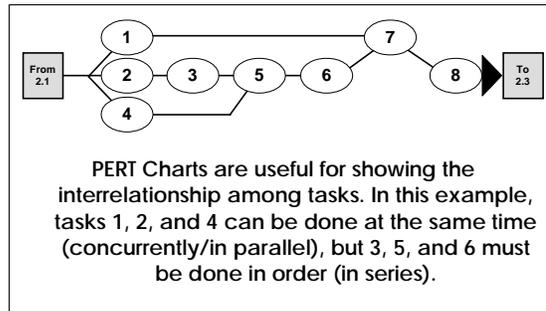
## A PACT PROCESS OVERVIEW

### Project Planning and Management (continued)

(Continued from page 6)

it's possible to walk around the entire beast, get a feel for the number of horns it's wearing, and scope out with some certainty what it will take to domesticate the animal.

- ▶ They bring constraints out in the open. CAD, MCD, and IAD projects have one thing in common: they require both customer-side and supplier-side people to make them work. And not just any people. They require the best and brightest—the ones who are already very busy in the organization. A detailed project estimate exposes these needs and gives the sponsor and Project Steering Team the chance to wrestle with them.
- ▶ They lend credibility to downstream parts of the PACT project. If it's the organization's first experience with *lean-ISD*, sponsors and team members will appreciate the rigor and attention to detail. It's not nice to say, but many ISD professionals lose credibility because plans and schedules aren't part of their world. Plans and schedules are, however, drivers in the real business world of CEOs and executives where decision-making is based on forecasts, plans, bottom lines, and returns on investment.



#### Why Planning Fails

The ISD customer who has been bitten by plans that changed frequently may be reluctant to invest in the time—upfront—to create a good plan. He or she could be thinking, “These ISDs never stick to the plans they create, so why waste time creating one we know is going to change anyway.”

Let's speculate on this dilemma for a moment. Despite our ability to read project tea leaves and peer into planning's crystal ball, conditions are likely to change as a PACT project progresses. But more likely than not, many of these changes will result from

- ▶ Unidentified tasks
- ▶ Tasks that were improperly scoped
- ▶ Unrealistic cycle times
- ▶ Poorly sequenced activities

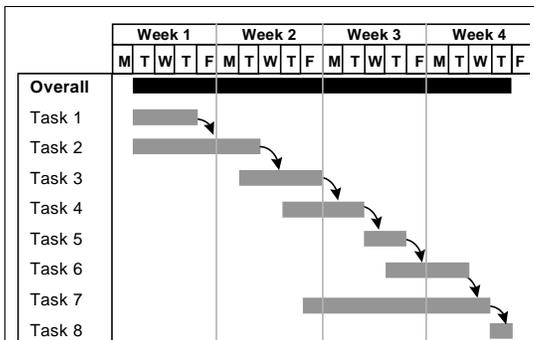
For the truly skeptical, these may be reasons to avoid detailed planning altogether. After all, the skeptic will say, “I can pretty much assure you that key participants won't be available at the right time and this will blow those critical path tasks anyway.”

So why not just avoid the planning phases anyway? That way, unrealistic expectations won't come back to haunt project participants. The reason is simple: good planning helps create the conditions that keep projects *in control*. And even if schedules must change to accommodate emerging priorities, the plan exists as a framework for the successful PACT project.

And if your plan is properly “socialized,” participants will own it. Owners typically take responsibility for outcomes because they feel

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*Despite our ability to read project tea leaves and peer into planning's crystal ball, conditions are likely to change as a PACT project progresses.*



Gantt Charts like the one above show tasks and the time frame in which each will occur. They don't, however, show the path of critical activities as well as a PERT Chart does.

One way to help communicate and sell a Project Plan is to create a high-level picture of it. Such pictures can be created as Gantt or PERT charts, non-PACT tools that not only help sell a plan but, more importantly, help expose critical parts of it that may not be readily visible to the naked eye. A PERT chart is better for showing the interrelationship between tasks and which ones must be completed prior to others.

## A PACT PROCESS OVERVIEW

(Continued from page 7)

accountable for what they've bought in to. Ultimately, the plan you create becomes *their plan*.

Now that's a good approach!

### *Organizing a PACT Project*

Organizing is about tactics, logistics, and moving the chess pieces around on the PACT gameboard. It requires asking lots of questions, thinking through *how* the process will be worked, and identifying the administrative elements of the Project Plan.

PACT Processes are driven by structured group meetings. If your project requires assembling a team from various corporate locations, then meeting rooms, travel coordination, and document distribution will need to be handled. (And don't forget the all-important decisions about which food and refreshment products are favored!)

We don't mean to imply that these are all-consuming tasks that require hours of a project manager's time. Rather, we want to make sure that the administrative details needed to run a smooth project aren't overlooked. Organizing skills are key.

### *Controlling the PACT Project*

The plan is in place and the logistics and administrative details are well in hand. Now it's time to manage the process by monitoring progress, adjusting for deviations, and replanning if necessary. This requires the project manager to monitor

- ▶ Cost performance
- ▶ Adherence to schedule
- ▶ Adherence to standards of quality

How the project manager tackles these jobs depends, in large part, on the size of the project and the customer's (and organization's) requirements for reporting status. Although these can vary substantially from project to project, the "keepers of the project requirements" are usually the project sponsor and the Project Steering Team. The role of the project manager is to ensure that the process's requirements are fully met despite how much or little detail the

organization needs or tolerates.

Here is where the skills and experience of a project manager come into play. It's a matter of being so "in tune" with the customer and so familiar with the process that the customer gets what he or she needs, and the project continues smoothly.

For example, if the customer wants to take a "hands-off" approach to the project (a "wake me when it's over" mentality), flashing red lights signaling an approaching freight train wreck should be going off in the project manager's head. An uninformed customer is a sure sign of potential failure and the direct opposite of "we (the ISDers) own the process, the customer owns the product" that is inherent in all PACT Processes.

### *Managing the "Administrivia"*

Handling the logistics of a PACT project requires answering questions about what it will take to help things run smoothly from an administrative standpoint. For example

- ▶ Will the PACT project have a headquarters, a project room?
- ▶ Where will project files be kept?
- ▶ Will the project require dedicated computer equipment or any new networking arrangements?
- ▶ How about phone and fax equipment?
- ▶ A PACT project can generate a lot of paper. If project participants themselves aren't going to generate charts, narratives, and diagrams, who will help them do it?
- ▶ Where will text production resources come from?

Fortunately, all PACT Processes include gate review meetings—built-in freight train wreck avoidance detectors that require Project Steering Team members to examine the project's progress and sanction continuing with the next steps in the process. These gate review meetings are formal, structured, and rigorous and are needed in today's

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*We want to make sure that the administrative details needed to run a smooth project aren't overlooked. Organizing skills are key.*



## Using Teams to Create T&D that Works for Even the Most Demanding Customers *(continued)*

*(Continued from page 2)*

my projects for more than 14 years. I fought hard for my turf—method versus content—and most teams willingly conceded. After a history of being right more often than wrong, after a while I earned my teams' respect, for they knew I was really on their side. When we disagreed, my posturing was almost never seen as self-serving. I stood up and took the bullets of wrath when things went wrong, even when they knew I had fought for something else. I willingly gave away credit, for it never really belonged to me singularly. It was always a collaborative effort. It was always a team effort.

### *Finding the Gatekeepers*

My views on teams are the same if not stronger today. Projects where we have set up teams correctly in the beginning have proven to be much more successful, where success is measured in terms of better, quicker, less costly, and greater stakeholder satisfaction. These are the earmarks of quality.

If you've been in this training biz for any length of time, you have probably experienced the difficulty of doing the "best training" from a training purist's viewpoint. You've had difficulty getting to the right people because of the "organizational gatekeepers." No one will give you input or do their reviews in a timely fashion. People who

confirmed their attendance on Friday for Monday don't show up on Monday. No one gets assigned content authority in areas of controversy, and therefore your content gets bogged down in political wars.

The trouble is that your project probably never was "sanctioned" from on high. If you attempt to invoke the names of the powers that be, you are either lying or are mentioning someone's name that is not in "my" chain of command, so go away. You cannot get your project moved up on everyone's priority list—not that you should, simply because "this is training and *it is always* important." You may have no credibility with the important power brokers.

You are resigned to deal with the people I refer to as the "Friends of Training." You know them. They always have time for you when no one else does. Their organizations always send them to the "nuisance" meetings, and training is sometimes viewed as a nuisance. Friends of Training never ask the tough questions. They are easy to work with. Friends of Training typically have no power base, little credibility, and if their names show up in your report or on the overhead transparencies, you will suffer an immediate case of "lack of credibility" for what you are trying to do. *Avoid the Friends of Training like the plague!* At least in public.

*(Continued on page 12)*

*"I stood up and took the bullets of wrath when things went wrong even when they knew I had fought for something else."*

## A PACT PROCESS OVERVIEW

### *Project Planning and Management (continued)*

*(Continued from page 8)*

world of empowered individuals and teams.

The project manager, of course, decides on the level of detail to be presented in these meetings—usually with input from the project sponsor. Our general recommendation is to prepare the details but present at a high enough level to maintain interest and avoid consuming the Project Steering Team with "administrivia." The project manager should look for verbal and nonverbal cues that the team is buying in to the outcomes and recommendations.

The ISD world is more complex than most customers think, only because they haven't spent that much time thinking about it. The role of the project manager is, in part, to help customers spend some time in this world.

When they do, they usually appreciate its inherent complexity and, therefore, support the need to plan their project at a detailed level. It's this act of planning that gets buy-in from customers and ownership for the outcomes. ▶▶▶▶

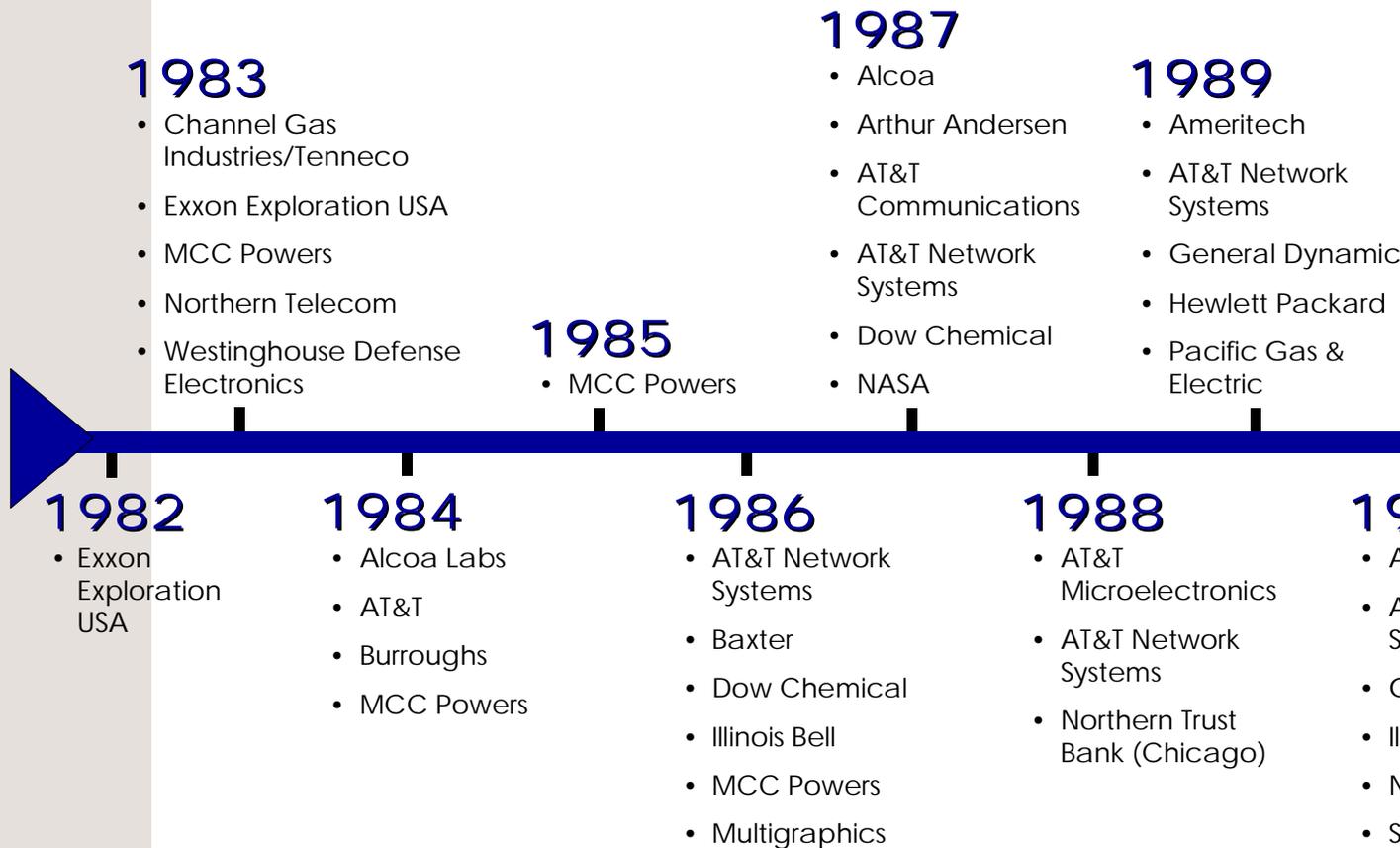
*A good project manager looks for verbal and nonverbal cues that the team is buying in to the outcomes and recommendations.*

### *Living in the World of ISD*

# Past CADDI Consultant Clients

**Guy W. Wallace Peter R. Hybert Kelly Rennels Smith Debra S. Arndt**

This time line reflects clients that CADDI consultants worked with at Svenson & Wallace, Inc. (SWI), the predecessor of CADDI. Guy's projects began in 1982, Pete's in 1989, Kelly's in 1993, and Deb's in 1994.



# Current CADDI Clients

## In 1998

- AT&T
- Bandag, Inc.
- BankAmerica Corporation
- General Motors University
- NOVA
- Rockwell Collins
- The Landis Division of Siemens Building Technologies, Inc.

## In 1999, to date

- Bandag, Inc.
- Eli Lilly and Company
- General Motors University
- Imperial Oil
- The Landis Division of Siemens Building Technologies, Inc.

## 1991

- AT&T Network Systems
- AT&T Network Systems—Wireless Business Unit
- British Petroleum—America
- Digital Equipment Corporation
- EDS
- General Dynamics
- Hewlett Packard
- Occidental Petroleum Labs
- Sears
- Whirlpool

## 1993

- Abbott Laboratories
- Amoco
- AT&T Network Systems
- Commerce Clearing House (CCH)
- Cornell University
- Data General
- Discover Card
- Hewlett Packard
- Imperial Bondware/Federal Paperboard
- ISPI (NSPI)
- Lockheed (General Dynamics)
- Spartan Stores/ISSC

## 1995

- American Management Systems
- Amoco Corporation
- Amoco Oil Company
- AT&T Global Information Solutions
- AT&T Network Systems
- Bandag, Inc.
- Eli Lilly and Company
- Eli Lilly and Company—Clinton Laboratories
- General Motors
- Hewlett Packard
- Imperial Oil
- ISPI
- Valuemetrics, Inc.

## 1997

- Amoco
- AT&T
- Bandag, Inc.
- BankAmerica Corporation
- Eli Lilly and Company
- General Motors
- General Motors University
- Hewlett Packard
- Imperial Oil
- ISPI
- Landis & Staefa, Inc.
- McLeodUSA (Consolidated Communications)
- NOVA

## 1990

- ARCO Alaska
- AT&T Network Systems
- General Dynamics
- Illinois Bell
- NCR
- Square D

## 1992

- AT&T Network Systems International
- Detroit Ball Bearing
- Digital Equipment Corporation
- Ford Design Institute
- General Dynamics
- General Motors
- NALCO

## 1994

- Alyeska Pipeline Service Company
- Amoco
- AT&T Network Systems
- Ford Motor Company
- Invetech Company
- NASA Lewis Research Center
- Novacor, Corunna Site

## 1996

- Amoco
- Amoco Marketing University
- Auspex Systems, Inc.
- Bandag, Inc.
- Bellcore Tech
- Eli Lilly and Company
- Eli Lilly and Company—Clinton Laboratories
- General Motors
- Imperial Oil
- Landis & Staefa, Inc.
- Sphinx Pharmaceuticals
- The Quaker Oats Company



## Using Teams to Create T&D that Works for Even the Most Demanding Customers *(continued)*

*(Continued from page 9)*

Go for the skeptics, the tough inquisitors—those who believe in the business first and training second.

### *What You Call Them Doesn't Matter*

Sometimes, but not often, one team is all you need. But more often than not, in complex organizations where the trainees work in multiple locations and where the target audience is not so homogeneous, you'll probably be better served by a multiple set of teams. I won't say that teaming makes things perfect or easier. But I do feel it moves most of the pain of projects to the front end, thereby reducing downstream sideswipes, excessive and predictable rework, and cycle time and cost. If you only need one team, you can roll all of the roles defined below into your one team. Call your team anything you like. Please don't get hung up on your favorite label versus mine.

The typical teams involved in a complex training development project might include the following:

- ▶ Project Steering Team
- ▶ Analysis Team(s)
- ▶ Design Team
- ▶ Training Development Work Team
- ▶ Pilot-Test Team

The Project Steering Team is a group assembled for just this project or a series of projects. It should include all of your stakeholders, at the highest level appropriate—people at the decision-making levels. Lower level folks who have been empowered will work as the Project Steering Team only if they truly have been empowered. This team is typically responsible for

- ▶ Owning the project
- ▶ Reviewing and critiquing the Project Plan and redirecting the project
- ▶ Selecting all project participants for the Analysis and Design Teams
- ▶ Reviewing and providing feedback for all project documents and outputs
- ▶ Establishing development/acquisition priorities
- ▶ Approving or redirecting the implementation plan

The Analysis Team(s) are composed of master performers, subject matter experts, supervisors/

managers of the target audience, and possibly some strong new-hires (who won't be intimidated by the experienced folks). This team is typically responsible for providing input related to

- ▶ Task, job, or process performance
- ▶ Knowledge and skill requirements
- ▶ Target audience demographic data
- ▶ Assessments of existing training

The Design Team is ideally composed of two or three members of the Analysis Team. This team is typically responsible for

- ▶ Creating design concepts and criteria
- ▶ Providing input and feedback for the preliminary design
- ▶ Reviewing the final design

The Training Development Work Team (ISD folks) is typically responsible for

- ▶ Preparing the Project Plan
- ▶ Selecting and recruiting the Project Steering Team
- ▶ Preparing for and conducting all project activities and meetings
- ▶ Facilitating the meetings of all other teams
- ▶ Creating the design
- ▶ Developing all training materials
- ▶ Preparing all other project documentation and reports
- ▶ Presenting all project intentions and results

The Pilot-Test Team members are the handpicked participants of the first run of the training program, the Pilot Test. The team should have a balance of target audience representatives and management representatives. Target audience reps are members of the target audience and will help us measure whether learning does occur in the session. Management representatives are management's *spies*, invited specifically to participate fully in the session as a trainee, experience the entire event, and help determine whether the learning that occurred was indeed appropriate learning. They can also report back to management whether this effort was good or bad. They are typically going to be there anyway, and I like to know who they are so I may segregate their feedback—they will evaluate a course differently than members of the target audience will.

*(Continued on page 13)*

*Teaming moves most of the pain of projects to the front end, thereby reducing rework, cycle time, and cost.*



## Using Teams to Create T&D that Works for Even the Most Demanding Customers (continued)

(Continued from page 12)

### The Most Important Team

The most important of these teams is the Project Steering Team. A Project Steering Team can make or break your project. They must be the representatives of all of your stakeholders. If you miss a key stakeholder when you attempt to set up this team, they will usually make their presence known to you later—much later and with significant negative impact on rework, cycle time, and costs. It's so much better to front-end load your own efforts to get the stakeholders identified and on board as your Project Steering Team sooner than later. But a Project Steering Team with powerful individuals presents a double-edged sword. Many trainers will fall on this sword, never to dance again.

The most important reason you will want to form a Project Steering Team, as frightening as the prospect might be for the trainer weak of heart, is that once you get the Project Steering Team behind you, everything else (gaining commitments and cooperation from all other project participants) will become much easier. It can be frightening, because the high-level players you really want on this team are going to be the hardest group you've ever tried to work with and control.

You should probably use the word "guide" when you discuss this with your teams, but I will use the word "control" here, because that is what you are really trying to do—control the process (not the content), and it's all for their benefit! It's their course; it's their performance improvement or lack of it that will result from the training. They should own the content decisions and you should own and control the process or method for getting the content identified. By content I mean selection of target audience(s), setting terminal objectives, scope of training, actual training information/demonstrations/exercises, etc.

The Project Steering Team needs to be composed of the highest level folks who may benefit from or be impacted by the results of the project *and* the conduct of the project. They will be hard to

"guide." They will have silo-hardened ideas/concepts/biases and demands. Only heavy, rational logic can sway them. Your best bet is to anticipate their view and "head it off at the pass." Anticipate their views, identify the pros and cons, list all other alternatives, rank them, and be prepared to answer tough questions with crystal clear logic, poise, and determination.

### Wimps Need Not Apply

Don't be afraid to be confronted or yelled at. This is not a job for a training wimp. You must be a business professional. You must do your homework and do it well. We don't do training for training's sake, we do it because it makes good business sense. It has to have a return on the investment. Otherwise, don't do it!

The key to the assembly of a powerful Project Steering Team may be to find a powerful agent of respect and power that you'll need to recruit to become your *project champion*. Once you have identified this person, you must first sell them on or negotiate with them everything about your plan. Here's where a detailed "draft" Project Plan becomes critical! Be prepared to have changes made to your project concepts and plan details. Be prepared to defend your views with the logic of business versus the logic of training.

The Project Steering Team chairperson, the project champion, must be selected with great care. Organizational politics are like land mines. They will do more damage than just trip you up. They can cut off your legs. You should navigate this killing field with great care. You may even need a mentor as a guide in selecting project champion candidates.

Once you have them identified, you must approach and sell them. You must demonstrate an understanding of the performance *situation* that the training project is to address, of its *implications* and the *problem magnitude* (again in the business terms of the "cost of nonconformance to quality standards" and not training terms—"they *need* training"), and what the *payoff* is for meeting the need. Most critically, you must demonstrate the return on investment (ROI) factors.

(Continued on page 14)

*We don't do training for training's sake, we do it because it makes good business sense.*

## A PACT PROJECT FROM THE C-FILES

### *Merchandising Skills Program (continued)*

*(Continued from page 3)*

The audience had different responsibilities and levels of experience. There were also differences in the sizes and locations of the stores for which they were responsible. As a result, some learners would require training on all standards; others required training on the delta between the old and new standards. There were also varying levels of merchandising skills that would be required by the audience members.

#### *Our Approach*

The training needed to be developed very quickly to coincide with Imperial Oil's January 1996 rollout of the updated retailing standards. Therefore, we modified the standard MCD process by combining several phases (Project Planning & Kick-off, Analysis, and Design) to save time.

While this reduced project cycle time, it increased the potential for rework during the Development Phase. To minimize this risk, we recommended a very thorough review and sanctioning of the design for the training by the Design Team prior to beginning development efforts.

Phases 1, 2, and 3 (Project Planning & Kick-off, Analysis, and Design) were conducted in a single meeting to plan the development effort, analyze the performance requirements of the learners, and create a design for the training. The design was

quickly documented and sent back to the team for review and approval.

In Phase 4 (Development), we split preparation of the ten lessons between two developers. They worked with the subject matter experts, located in Toronto, to get the content needed to draft the lessons. Logistics required that most information be gathered during phone interviews and by fax and electronically transferring data.

Phases 5 and 6 (Pilot Test and Revision & Release) included a train-the-trainer session to familiarize the trainer with the materials and to do a last-minute quality check of materials prior to

*(Continued on page 15)*

*We modified the standard MCD process to save time. While this reduced cycle time, it increased the potential for rework.*



Imperial Oil of Canada used the MCD process to help more than 900 retailers and territory managers learn merchandising skills.



### *Using Teams to Create T&D that Works for Even the Most Demanding Customers (continued)*

*(Continued from page 13)*

Few people in the upper ranks of the business enterprise are interested in learning all the ins and outs of training theory and practice. They don't have the time, the desire, or the patience for it. They make business decisions based on the harsh realities of business, especially ROI. Be prepared to sway with the demands of business decision-making versus the demands of training decision-

making.

Working with teams in developing training is the same as working with any product development team. You must be well organized, flexible, and very business minded. Training for training's sake doesn't cut it in the business world. Training for the sake of the business does. ▶▶▶▶

## A PACT PROJECT FROM THE C-FILES

### *Merchandising Skills Program (continued)*

*(Continued from page 14)*

the pilot delivery. A developer attended the pilot to conduct evaluations of the lessons and to document edits and changes. After the pilot, revision recommendations were compiled based on the data collected. The customer had the responsibility to approve or reject the recommendation, and the materials were updated accordingly.

#### *Design Considerations*

The modular design inherent in the MCD process was ideal for this project: the training would include constantly changing content due to annual revisions and updates to the retailing standards and because our target audience had a range of learning requirements.

The modular design would accommodate the need for frequent content changes by segregating volatile content into modules that could be easily lifted out and replaced with current content. It also would allow the course to be delivered in whole or in piece parts, depending on the requirements of the audience.

The new retailing standards were themselves being developed as we were developing the training. Given the short time frame, we couldn't wait to start developing the training until they were finalized! We had to develop in a way that would allow content pieces to be inserted in the framework as they were available. That is definitely not a unique situation, but it is somewhat challenging!

The training would be delivered throughout Canada and would require translating the materials into French. The translation effort was challenging, not only because of the tight time frame, but because the training was being built around content that was still under development. This required the translators to begin on a draft version of the training and add content as it became available. This

made assuring the quality of the translated version of the training very tricky. As the project manager ultimately responsible for producing a high-quality output, I found myself trying to QA materials in a foreign language!

The training was performance-based and was designed to include many hands-on exercises. In several of these exercises, participants actually created their own job aids for use back on the job.

#### *Lessons We Learned*

Like all PACT projects, the Imperial Oil effort offered proof that the MCD process can be adapted to meet a customer's unique requirements.

One thing I learned from this project is that developers and subject matter experts don't always have to sit in the same room. With E-mail, the Web, and fax capabilities, some development can occur remotely—saving the customer time and money. In addition, by emphasizing the modular feature of MCD, we were able to separate volatile and nonvolatile content. This reduces revision time and cost. The modular approach also provided our client with the flexibility to downselect from all the modules only those that the learner would need. ▶▶▶▶

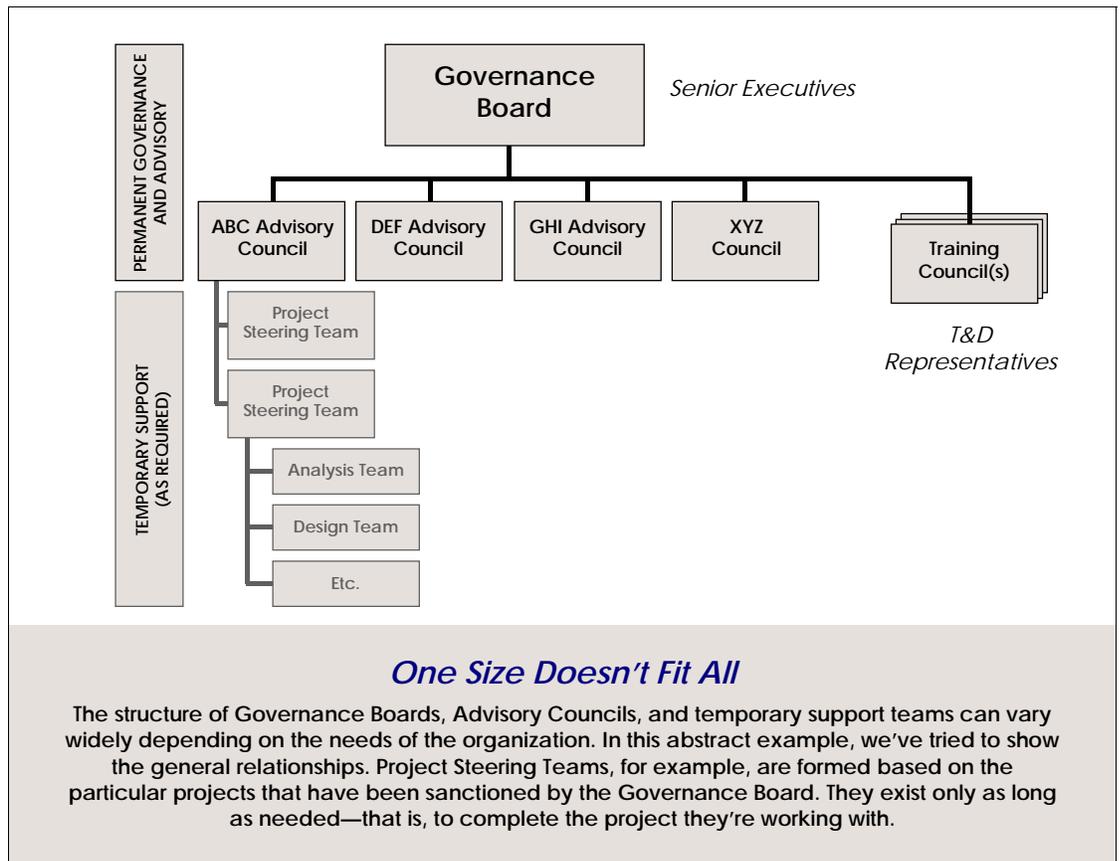
*The new retailing standards were being prepared as we were developing the training. This presented a challenge from a training development standpoint.*

#### *Wedding Smiles*

CADDI partner Kelly Rennels and Steve Smith became partners at their May 8 wedding in downtown Chicago. Steve, an account executive for Interkinetic, and Kelly plan a move to the Naperville area this summer.



Photo by Brett Kramer

*Governance and Advisory Processes (continued)**One Size Doesn't Fit All*

The structure of Governance Boards, Advisory Councils, and temporary support teams can vary widely depending on the needs of the organization. In this abstract example, we've tried to show the general relationships. Project Steering Teams, for example, are formed based on the particular projects that have been sanctioned by the Governance Board. They exist only as long as needed—that is, to complete the project they're working with.

(Continued from page 3)

In this article, we're going to look at the 12 o'clock position and try to make sense out of the Governance and Advisory Systems. Let's start with the words we used to describe these systems in our previous newsletter.

The central, driving force behind the strategies for business-based T&D. These systems organize key stakeholders of the enterprise and formalize the channels of communication. They provide the forum for T&D's internal marketplace customers to provide advice, and give the organization's executive-level leadership governing power over T&D strategies, tactics, and resource allocations.

If you're like many of us dyed-in-the-wool T&Drs, you may have felt a twinge of undefined

origin as you read the previous paragraph. After all, figuring out what needs to be developed and deployed is a decision for the T&D department to make. That's half the fun of having your own department with a large budget, right?

But you may have run into a downside lately: many different customers have been coming to you with multiple (and conflicting) priorities, and you don't have enough staff to meet the expectations. You also don't have the clout or support to go to the big bosses and make a legitimate case for more ISD-heads and budget. Worse yet, a few of the folks in the company aren't really sure you "get it"—they say your courses are sprinkled with "foo-foo dust."

Today, more and more companies—led by a new breed of ISD professional—are replacing this *learning by chance* approach to T&D decision-making with a systematically thought-through system that designs value in to the organization's

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*Figuring out the training that needs to be developed and deployed is half the fun of having your own department with a large budget, right?*

## Governance and Advisory Processes (continued)

(Continued from page 16)

learning activities and returns from the investments. Where the ISD professional *engages* key stakeholders in the key decision-making processes, appropriate T&D development efforts are linked to specific knowledge and skills that have been systematically derived as being *required* for successful performance, not just *nice-to-know* topics and learning games off the top of someone's head.

Training resource allocation decisions should always be based on improving the corporation's bottom line. Resource decisions can become "no-brainers"—if that favorite presentation skills workshop isn't working, its maintenance effort should get shelved for the higher gap T&D priorities that will return their weight in gold. Where should training dollars be spent: on

developing 15 new salespeople to sell to emerging Pacific Rim markets (\$50 billion in new business is up for grabs) or on that new course on *feel good* interpersonal communications for the entire payroll of 32,000? If you were the single shareholder, where would you invest?

The power behind learning by design is the structure that governs the T&D decision-making

processes. It begins in the Governance and Advisory Systems. The system consists of three components, the first two of which are permanent structures.

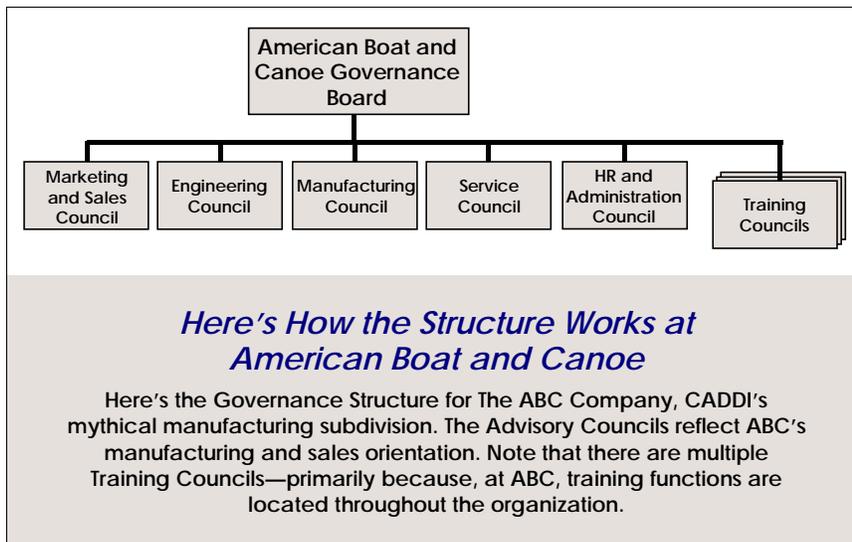
- ▶ A Governance Board, typically composed of executives of the enterprise, sanctions the overall T&D approach and allocates resources based on business needs and strategies and advice of the next groups.
- ▶ Advisory Councils are appointed by members of the Governance Board. The Advisory

Councils represent their own domains (engineering, sales, marketing, for example), provide advice to the Governance Board as it decides where to expend the limited resources allocated to T&D, and then steer T&D efforts within their areas of interest after resourcing.

The third component is temporary.

- ▶ These are the teams temporarily put in place to support PACT and other T&D processes. They may include Project Steering Teams, Analysis Teams, Design Teams, and any other support teams that a Curriculum Architecture Design, Modular Curriculum Development, or Instructional Activity Development project requires. They are formed as part of a PACT Project, do their work, and disband once the project is complete. Project Steering Team members are appointed by the Advisory Council who, in turn, handpick all other project-related team members.

*The power behind learning by design is the structure that governs the T&D decision-making process.*



### The Governance Process

The Governance Process organizes the executives of the company for directing and resourcing the T&D systems and efforts. Their focus is usually not on the "low-hanging fruit" with its mass appeal. Nor is their bias to fill empty classroom seats with employees who need a place to sit (we call this "butts in seats," and it is a key measure of the lowest of the low-hanging fruit metric).

The only way to ensure that the T&D system is

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## LEARNING BY DESIGN

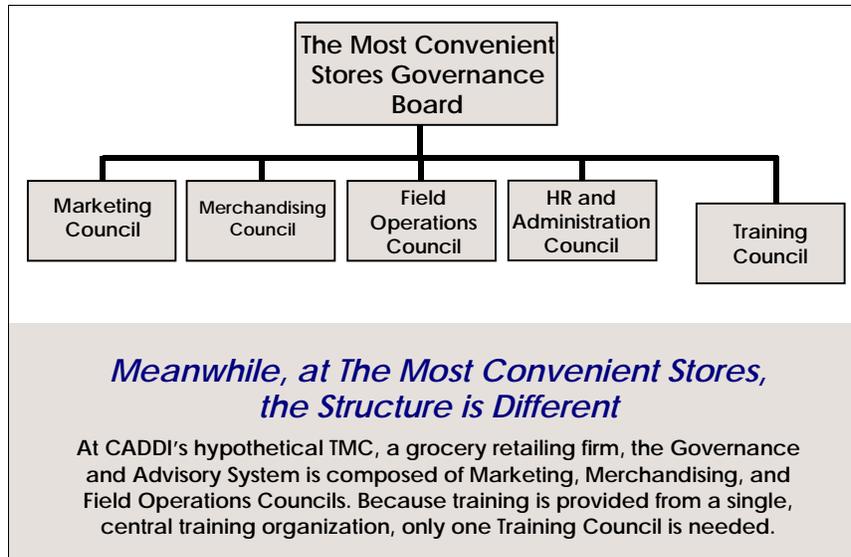
# Governance and Advisory Processes (continued)

(Continued from page 17)

addressing the business-critical and highly important, high-payoff T&D is to systematically engage the leaders of the enterprise to double-check the findings of the Advisory Councils who provide investment recommendations to them. It builds confidence that T&D expenditures are I's with plenty of R's to follow (as in ROI).

resource allocation, decision-making Governance Board. Advisory Councils look out for the more parochial T&D needs of individual functions and processes (processes owned by their functions) of the company.

How these councils are structured and the number of them depends, largely, on the organization and how it operates. Ideally, they should represent



functions and disciplines and cover the leadership, core, and support business processes.

Advisory Councils also sanction and support T&D projects within their own domains. Steering Teams for CAD, MCD, and IAD projects are authorized by the Advisory Councils.

Members of the Advisory Councils usually serve three-year stints. One-

*The Governance Board uses T&D to help people develop the knowledge and skills they need to perform on the job.*

Ideally, the Governance Board includes the most senior executives of a company. These are the folks who understand the strategic direction of the business. When they make T&D decisions, they base them on how T&D can help align the people-resources with what needs to be done. This board doesn't try to use T&D to make up for bad organization structures, poor communication, bad processes, or any other quality-impacting element *except for the knowledge and skills that keep people from performing*

The Governance Board will typically meet twice a year. The first meeting is in sync with the enterprise budget cycle. The second, six months after, is used to review and make any midcourse corrections. Members rotate on and off but still represent the key business functions or processes.

### The Advisory Process

The Advisory Process includes a set of committees and councils immediately below the

third of the members leave the Councils each year and are replaced by other appropriate members who have been appointed by the Governance Council. This rotation in office is important to the continuity of the Councils' work. The Advisory Councils' meetings occur before the Governance Board meetings and are held at least twice a year.

### Temporary Project Support

PACT Projects almost always use a team approach to producing/acquiring T&D. We don't advocate teams just for the sake of including people so they'll "feel good" about the process, but because the critical T&D needs of the organization are best addressed when the right people are involved in the right manner at the right time in the analysis, design, development, and/or decision-making needed in the CAD, MCD, and IAD methodologies.

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# ISPI Workshop Covered Basics of HPT

By Kelly Rennels Smith

I attended the preconference offering of the Performance Improvement: Principles & Practices workshop at the ISPI conference last March in Long Beach. The two-day workshop was designed for people charged with improving performance in the workplace and covered the basic concepts and principles of human performance technology (HPT).

The workshop used a variety of case studies, job aids, and lecture/discussion with the “expert faculty” who taught participants to design more effective performance and instructional systems. In the final workshop activity, participants chose a specific type of system that interested them (including instructional, performance support, incentive, feedback, and organizational change systems). Multiple breakout rooms for small-group case-study activities were provided.

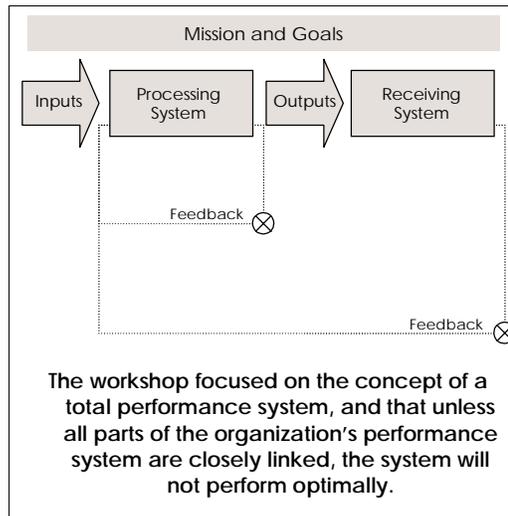
“HPT is a systematic approach to improving productivity and competence using a set of methods and procedures for realizing opportunities related to the performance of people.”

Workshop participants represented a wide range of experiences that made the group interactions very interesting and effective. The workshop’s “expert faculty” also represented a wide range of background and experience, with about eight different experts involved in the workshop.

Although similar workshops in the future will be valuable to anyone interested in HPT,

they will be especially useful to newcomers who would benefit from interacting with the experienced participants and the expert faculty. ➤➤➤

*The workshop was a good opportunity to learn from its expert faculty.*



## LEARNING BY DESIGN

### Governance and Advisory Processes (continued)

(Continued from page 18)

Membership in the temporary support teams is determined by the specific criteria and plans for the particular PACT Project. Project Steering Teams are different from Analysis or Design Teams.

The key here is that the most valuable contributors to these temporary teams will be the busiest ones in the organization and getting them is difficult, unless they are appointed by leaders in their functions/disciplines. And then, their time must be used judiciously. It's always easier to

obtain their help when they know that theirs is a temporary assignment with start and end points.

The Governance and Advisory Processes are the glue that hold high-impact T&D together. They provide the cross-organization knowledge that identifies real business/performance needs; they prioritize these needs and sanction which projects do and do not get resourced from among all the training needs that may exist. ➤➤➤

## CADDI CREWMATE PROFILE

### *MaryBeth O'Hara, Quality Assurance Manager*

When she's not buried beneath a stack of dictionaries, style guides, and CADDI projects, MaryBeth O'Hara, CADDI's quality assurance manager, is probably enjoying the leisurely life of a sailor—or at least a boater—on her favorite Illinois lake. And which lake would that be? “Any lake,” she jokes. MaryBeth and Jay, her husband of ten years, bought their first boat last year and with the summer weather, that's where you'll find them almost any weekend.

Among the CADDI crew, MaryBeth is humorously referred to as “the bottleneck by design.” All CADDI work products, whether for customers or internal documents, undergo her eagle-eye review for proper grammar, punctuation, and adherence to CADDI production and style requirements. “I want to help others do their best work. Although everyone is responsible for being accurate, I help by being another set of eyes on any project.”

Guy, who coined the “bottleneck” phrase, sees her as a critical part of the company's goal to consistently produce high-quality materials for our clients. “I have a great deal of respect for her talents as an editor,” he said. “We've worked together so long that she even knows my ‘guyisms’ by heart.”

MaryBeth received a Bachelor of Science degree in journalism from Bradley University in 1988. While she enjoyed working on the school newspaper, it was at this time that she realized that she preferred to improve other people's writing as opposed to doing the actual writing.

After graduating, she began her professional career with National Education Training Group where she was the production editor/editor until 1993, when she joined Svenson & Wallace. As editor of SWI's newsletter *Pursuing Performance*, she shared a Merit Award from the Society for Technical Communication. In addition to her editing responsibilities at SWI, she served as the proofreader for the Chicago chapter of ISPI's newsletter for which she shared the Outstanding Communication Product Chapter Award from ISPI.



In 1997, she became CADDI's quality assurance manager with responsibility for ensuring that client and marketing materials are produced on a timely basis. She works with a staff of three full-time production team members to do this. Based on requirements, she determines whether temporary help is needed and, if so, coordinates with temp agencies to obtain it. She also determines who should work on what project components based on the staff's individual capabilities.

MaryBeth especially enjoyed working on the merchandising project for Imperial Oil that Kelly wrote about in this newsletter. “I guess it's because my husband works in the retail business that I could see how the location of products affects consumers,” she said.

She has also enjoyed working on Guy's upcoming book, *lean-ISD*. “Although it's been a challenge and has taken much longer than I expected,” she said, “it'll be really exciting when it's finally published to know I played a part in it.”

If they aren't relaxing on a lake, she and Jay are probably enjoying the company of Jaycob, their 18-month-old son and Bear, their shepherd-collie. Or, you can find them tromping (gently, of course) through local forest preserves, off the beaten path. “It's the only nonstandard thing I do,” she said. ▶▶▶▶

*It's MaryBeth's eagle eye that looks at all documents that leave CADDI's Naperville headquarters.*