

Project Plan: Customer/Stakeholder Interview Guide

Development Job Aid

Problem/Opportunity Background

Customer

- Who is/are the customer(s)?
 - Names, titles, organizations
- Who is/are the (potential) sponsor(s)?
 - Names, titles, organizations
- Who are the other key stakeholders?
 - Names, titles, organizations

Problem/Opportunity Statement

- What is the specific problem/opportunity?
 - Who, what, where, when, why regarding the symptoms?
 - What are the key metrics (measures) required by each, and what is the actual versus desired performance?
 - Is the cause known or suspected?
 - How will solving the problem benefit the company, organization, stakeholders, etc.?
- Is the solution being prescribed by the customer?
 - How flexible and receptive are they to other solutions or redefining the problem?

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Problem/Opportunity Background

(continued)

Situational Background

- What is the background related to this project?
 - What has led up to this?
 - What are the stimuli (stimulus) for undertaking the project?
 - Why is this being addressed now?
 - What other issues and initiatives will impact this project?
 - What other issues and initiatives will be impacted by this project?

Project Overview

T&D Project Objectives

- What specifically should the project accomplish?
 - What is to be produced and for whom?
 - How will it be measured, in general?

Project Success Criteria

- What are all the success criteria or metrics per key stakeholder group?
- Over what period of time should we expect to gain improvement?

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Project Overview *(continued)*

Evaluation Plan

- What is the plan for conducting an evaluation of the training and development and the results of the project?
 - Who will conduct the effort?
 - What will be produced and to whom will it be distributed?

Deployment Plan

- How will the training and development be deployed?
- By whom?
- How often?

Development Plan

- Who are the subject matter experts or master performers?
- Are/will they be available to support the development effort?
- What are the constraints on their time and availability?
- Do materials and information currently exist?

Project Scope/Deliverables/Approach/Roles

Scope

- What defines the beginning and end points for this project?
 - Project activities
 - Calendar/schedule
- What is included within the scope of the project?
 - Target populations
 - Process(es) or performance boundaries
 - Types of consulting services
- What should be explicitly excluded from the scope of the project?

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Project Scope/Deliverables/Approach/Roles (continued)

Deliverables

- What specifically is to be produced and delivered as a part of the project?
 - Reports, presentations, etc.
- How many iterations are expected for each deliverable?
 - Initial draft
 - Number of additional drafts/updates
- What software packages (and version) will be used to produce the outputs?
- What format, structure, and packaging rules will be followed (as appropriate) for each of the deliverables?

Approach

- Who will own the ongoing maintenance of the deliverables?
- What key methods will be employed to conduct the various activities of the project?
 - Literature research
 - Surveys (phone or written)
 - Interviews (with whom)
 - Group meetings (with whom and for what purposes)
 - Etc.

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Project Scope/Deliverables/Approach/Roles (continued)

Roles and Responsibilities

- What are the key roles (role sets) involved in the project?
 - Sponsor
 - Customer project manager
 - Steering Teams
 - Analysis Teams
 - Design Teams
 - Pilot-Test Teams
 - Etc.

- What are the specific responsibilities for each of the roles?
 - To direct
 - To approve/reject
 - To review
 - To provide input

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EPPIC Staff Backgrounds

- What are the following for each staff member to be assigned to the project?
 - Name, title, organization
 - Assigned project role
 - Credentials (education, work experience, publications, etc.)

Project Tasks/Assignments/Schedule

Task Charts

- What is the reaction to the standard phases for conducting this type of project?
 - What should be the dates for key project milestones that are acceptable?
 - What are the key outputs per phase?
 - What are the key tasks/activities per phase?
- Which role is needed to be involved in which project tasks?
- What are the key schedule dates for key project tasks (review meetings, etc.)?

Notes

Project Cost Summary

- Total project cost
 - Estimated or fixed fee?

Cost Breakdown

EPPIC Staff Costs

- Number of days of involvement required by EPPIC staff
 - Rate per day

Outside Contractor Costs

- Number of days of involvement required by outside contractor

Travel and Living

- Expenses
- How many trips will be required?
 - Average airfare expected
- Number of days out of town
 - Cost per day for food, lodging, ground travel, and miscellaneous expenses

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Cost Breakdown *(continued)*

Materials

- What materials will be consumed in the course of the project?
 - Report binders, tabs, and paper
 - Presentation materials
 - Etc.

Extraordinary Support Services

- What additional services will be consumed in the course of the project that are not covered by the daily rate of the EPPIC staff member?
 - Word processing temporaries
 - Graphic services
 - Shipping
 - Printing
 - Other duplication
 - Etc.

Notes