

Generic Business ID Project Management

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Executive Summary

ID Productions, Inc. (IDPI) develops instructional products, 2-3 Day Workshops, Online Courses, and Online Self-study, for schools, higher education, companies, and other contexts. Due to his growth and reputation of creating excellent quality learning products, IDPI is also engaged in the evaluation of existing products such as Online Courses and Online Self-Study, to recommend changes or enhance them.

The company is run by a president, a financial director, and product directors. All of them are well qualified in the areas of Instructional design, technology, and business. There are also specialists that support the development of the IDPI products. Specialists are qualified in the areas of instructional design and development, technical writers, technology/e-learning, programmers, graphic artists, message design, videographers, program evaluation analyst, education project managers, expert trainers, facilities site coordinators, and client trainer and self study advisors.

The problem for which we were entitle of giving a practical solutions is that IDPI has presented challenges coordinating the work of multiple project teams that are producing the above mentioned products, in a time frame and with the clients' expected outstanding quality. Because this problem was affecting the management of the specialists by allocating multiple jobs creating schedule conflict and overload work packages, a quick solution was in demand. In the end, the goal of the IDPI company is to have a sufficient and flxible project management plan that will allow them the production of different types of instructional projects while maintaining quality based on their clients' expectations.

In order to help IDPI reaching their project goals, the Management Project Team has developed a generic, inclusive, and flexible Project Management Plan (PMP) that IDPI project managers can use to manage their team as a whole more effectively and schedule the specialists' workload more efficiently. In this PMP tasks concerning to the analysis, design, development, implementation, and evaluation phases for each of the different types of products produced and the sequencing of each events are reflected. Communication such as meetings, sign-offs, content review, and deliver instruction between clients, the project team, and others are also implemented in the PMP. and lastly, the PMP reflects variations according to changes in the process of the learning courses development for a better re-adjustment of the company's schedule.

As a conclusion, the aim of this document is to have a concise information about the new PMP solution that will be used as a company-wide guide tool to manage the development of all products and individually by project teams in order to continue delivering clients' expected products in a wise time-frame.

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DEFINE

Problem/Opportunity

ID Productions, Inc. (IDPI), a company that produces instructional solutions for businesses, schools, higher education and others, is having performance problems due to the insufficient project management plans that affects the ability of moving through projects effectively and scheduling personnel in an efficiently way. Being the administrators well prepared in the areas of Instructional Design and Management, their project management styles fall more into instincts than a well developed and congruent plan. This behavior facilitates a lack of consistency in the management of projects, follow up on project phases, scheduling of specialists, and having realistic slots open for new business. Even though the management performance problems, the business is very satisfactory and there is a new area of the business development that is demanding more workforce. This behavior is uncovering a new set of possible performance problem due to the lack of sufficient personnel to conclude all duties with the expected quality.

Persistence in these problems IDPI may decrease their business or lower the quality of their products which can bring a negative impact to the company. Actions to decrease these performance problems and ensure the effective functioning of the IDPI group should be taken for its wealth and continue growth.

Project Goals

To develop a generic, flexible, and inclusive PMP template that can be used by the IDPI managers to help make the management of educational project more effective and the sharing of instructional specialists more efficient.

Project Objectives

- Create communication and sign off strategies between administrators and specialists, clients, the project team, and others who will provide content, review, and delivery of instruction.
- Create PMP component for the 2-3 day workshops
- Create PMP component for the 4-month Online instructor-led instruction
- Create PMP component for the 4-month Online self-study instruction
- Create PMP component for the evaluation on other organizations' *instructor-facilitated online courses*
- Create PMP component for the evaluation on other organizations' *self-study online courses*

Success Criteria

- Effective coordination among team members based on allocation to multiple projects
- Effective communication between professionals who are involved in these projects
- Effective development of instructional projects on-time, and within budgets

- Administrators are able to manage projects effectively
- PM are able to effectively schedule specialists' tasks
- Effective development of evaluation of other organization's instruction

Assumptions and Risks

- IDPI team members may have schedule conflicts that can interfere with participation on project activities (e.g., client deadlines)
- The PMP must be customizable, i.e., removing a series of related activities in the plan (e.g., video production, website production) will not disrupt the entire plan.
- Failure to deliver an effective project management plan to guide stakeholders and work efforts include low quality products
- Inefficient work habits
- Frustration of stakeholders being over or under booked on projects
- Missing meetings or lack of communication
- Unsatisfied customers and potential reduction of profits
- Attitude toward a consistent project management
- Time frame to create a new PMP may be short

PLAN

For the PLAN phase, the work per specialist has been organized and created a list of tasks according to the analysis, design, development, implementation, and evaluation phases for each of the different types of products. A relation of the tasks is shown below which includes all the critical tasks that must be done. Since the company develops 3 products and has new business, we have divided the activities into 6 parts. A detailed WBS/Time can be found in **Appendix A**.

Work Breakdown Structure (WBS)

Activities	Activity Description	Characteristics			
		1	2	3	4
Communication/ Sign Off Strategies					
1.1	Create a shared calendar (online/offline) of important events that includes all who are involved in the courses development	Y	Y	Y	Y
1.2	Implement an online discussion board for team discussions/questions on products	Y	Y	Y	Y
1.3	Implement a monthly meeting for updates on new products, status of projects, and any other inquiries	Y	Y	Y	Y
2-3 Days Instruction-led Workshops					
2.1	Conduct clients' instructional, audience, content, and environmental analysis	Y	Y	Y	Y
2.2	Design instructional goals, objectives, content, and course evaluation and assessments	Y	Y	Y	Y

**Chart was created using the table feature in Google Docs*

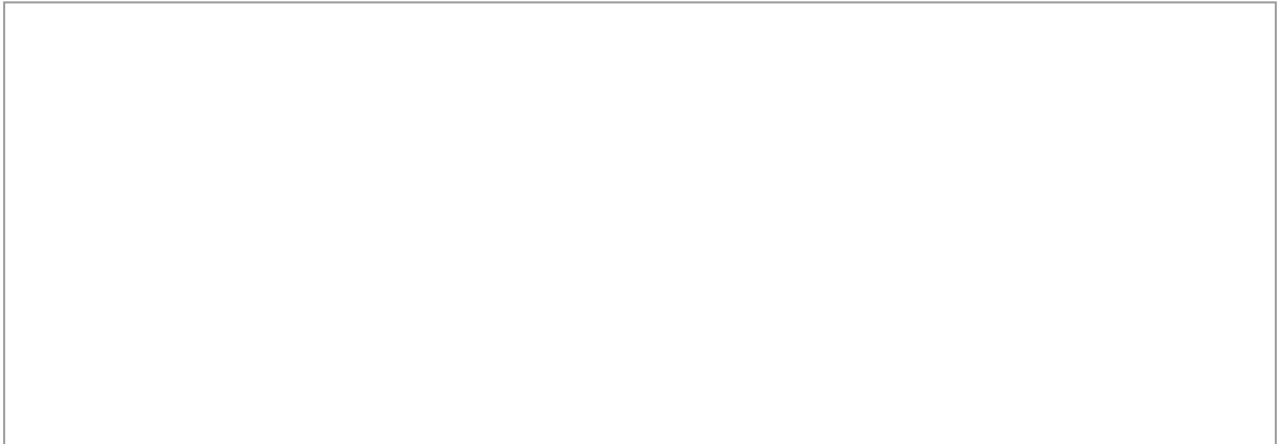
Critical Path

The critical path depends on the longest task-time spent on the project. The critical path shown below represents the task line which takes the most time to complete for this project.

**Critical Path chart was created using the Drawing feature in Google Docs*

Management Tools: Gantt Chart

The Gantt chart was developed as a management tool for Project Manager, Product Directors and IDPI directors as well. The functionality of this generic, flexible, and inclusive Gantt chart is to manage scheduled tasks and specialists efficiently according to what workforce is needed for each project. See **Appendix B**.



**Gantt Chart was created in Excel*

Project Plan with executive summary, definition, plan

The overall plan for IDPI is to implement a communication/ sign-off strategies to improve communication, reduce conflicts among team members, managers, and company directors, and to make management style comprehensive. These can be possible by implementing a shared calendar to maintain director, managers, and team members informed of major events regarding to projects. Implement an online discussion board where topics can be discussed and questions asked across teams. Implement monthly meetings to follow up on projects status and variations. Create a project management template that is generic, flexible to change as needs arise, and inclusive for all the ongoing and upcoming projects, to maximize the use of specialists by keeping a productive scheduling system.

ORGANIZE

Project organization chart and reporting structure

For the aim of this project, the team members were divided into three teams: instructional designer team, specialists team, and implementation team to better visualized organization of the specialist..

**Organization and Reporting Structure chart was created using the Drawing feature in Google Docs*

Recruiting criteria for personnel needs and leadership quality

For the selection of the best candidates to work in the management and development of the IDPI products a relation of candidates title and descriptions has been compiled together in the following table. Among of the candidate criteria, it is very important to remember that the chosen candidate, must have those qualifications, but must be flexible and innovative.

Job Title	Criteria
Project Manager	<ul style="list-style-type: none">● have majored in project management● have management experience in instructional projects● good communication skills
Instructional Designer	<ul style="list-style-type: none">● 3+ year instructional design experience in F2F/online instructional projects● expertise in designing and developing instructional materials● good communication skills

Assessment Analysts	<ul style="list-style-type: none"> ● 3+ year assessment experience in instructional projects ● good communication skills
Problem Evaluation Analysts	<ul style="list-style-type: none"> ● specialist in designing, developing, implementing and analyzing evaluations
Technical Writer	<ul style="list-style-type: none"> ● specialist in writing reports and some documents in paper-based format
Programmer	<ul style="list-style-type: none"> ● good at developing technology-based resources like websites
Graphic Artists	<ul style="list-style-type: none"> ● specialist in creating graphic images ● have excellent visual sense ● good at giving advice on graphic design
Videographer	<ul style="list-style-type: none"> ● have rich experience in shooting and editing videos
Expert Trainer	<ul style="list-style-type: none"> ● 3+ year experience in training
Client Trainer and Self-study Advisors	<ul style="list-style-type: none"> ● have 3+ year experience in training other specialists, facilitators, content experts before
Facilities Site Coordinators	<ul style="list-style-type: none"> ● have experience in planning workshop implementations

Work Packages Descriptions/ Assignments:

The work packages were assigned according to the specialists skills and the tasks that need to be completed by a certain schedule. The following table is a snapshot of the entire work packages descriptions and assignment table found in the **Appendix C**.

**Gantt Chart was created in Excel*

CONTROL

Management Style

Requirements for project manager:

One of the problem that IDPI is presenting is the tendency of a laid back and poor communication project management style. Additionally to the solution requested, some suggestion are being added to effectively manage IDPI projects along with the given solutions. Overall, a project manager has to do well in motivating and empowering team members. Also, the project manager should be responsible for monitoring and guiding team members' progress and use the given tool to make strategic changes as needed. A very important point is practice effective communication among all to ensure the functionality of the team and enhance results. In detail, these are some suggestions for the proper functionality of IDPI project managers:

1. Communicate with team members frequently
2. Share ideas and new strategies with peers
3. Facilitate and encourage team members rather than be a boss
4. Provide team members with resource rather than just be a controller
5. Be aware of the differences in persons and respect their unique characteristics
6. Give team members more freedom to guide their own work
7. Envisage and be tolerant of mistakes and errors because they are normal
8. Never over-direct, over-observe, or over-report

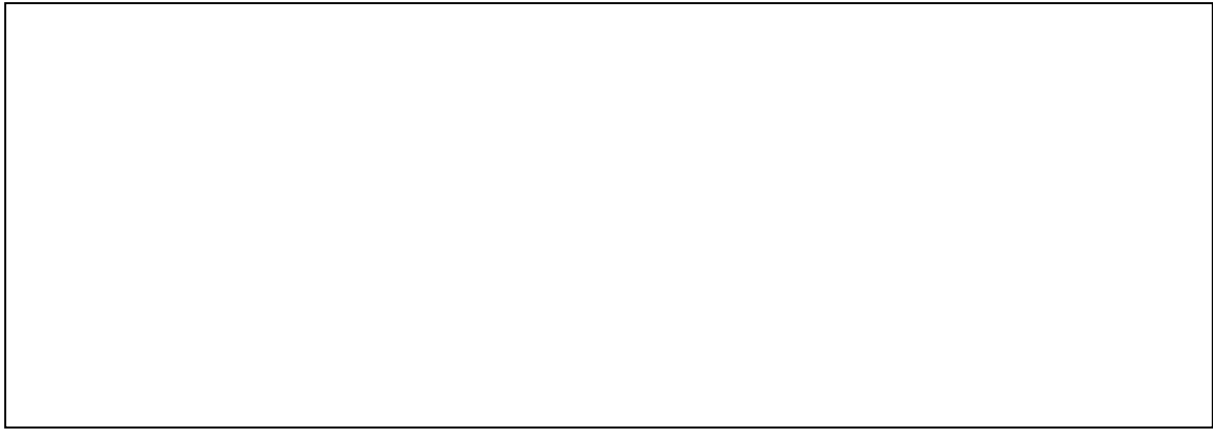
By ensuring all of the above, IDPI project managers will be able to facilitate the following details among team members.

1. Be willing to communicate with the project manager and other team members
2. Be aware that the whole is equal to more than the sum of its parts
3. Seek ways to understand others firstly, and then to be understood
4. Realize that a new group goes through a development cycle which is Forming Stage, Storming Stage, Norming Stage, Performing Stage and Adjourning Stage

Management Tools: Status reporting, variance reports, and change requests

For the purpose of the solutions of this project, a variance chart has been used that yield status reports to help administrators and project managers to track progress of the multiple project or individual ones in order to take corrective action to bring tasks back on schedule.

The Variation/Status Gantt chart created, includes the start and end dates of each task, specialists responsible for those tasks, a timeline of all the tasks duration for each project, and the status of each task as compared to the actual date. One of the additional and useful features of this chart is the constant comparison among the most optimistic, most probable and most pessimistic duration for each task made to help managers make decisions depending on variations. See **Appendix D** for a complete chart.



**Variation/Status Gantt Chart was created in Excel*

Based on new requirement from the client in IDPI, to make the total duration of this project 25% shorter than before, a revised variance/status Gantt chart was done by reducing the duration of each activity 25% shorter than before as it is shown below.

In this case, variance/status reports make possible for the project managers to know the current period of the status of this project and to follow up on any change. The chart reports project variances and activities variances, helping managers if whether the project is ahead of schedule or behind of schedule. See **Appendix D** for an updated chart.

**Variation/Status Gantt Chart was created in Excel*

Communication, conflict resolution, and contingency planning strategies

Effective communication plays an important role in a project team. Consistency without time conflicts also makes administrators understand what phase a project is in or where specialists are already scheduled. Since the team may have some barriers in communication and time conflicts among team members, several solutions for team members are being implemented to facilitate effective communication in beneficial and convenient way:

1. Created a shared calendar (online/offline) of important events that includes all who are involved in the courses development so that directors, managers, and team

members are able to know what phase a project is in and the completeness of the products.

2. Implemented an online discussion board for team discussions/questions on products, schedule, and projects.
3. Implemented a monthly meeting for updates on new products, status of projects and any other inquiries.

CLOSE

Project Closing Plan:

Finally, it's time to terminate our project. Some steps need to be done before we can obtain our clients approval. We have a project closing plan including the following phases:

1. Create a termination team including assigning a termination manager and some members to assist the manager
2. Terminate all work orders, contracts and assignments
3. Complete all of the documents of the project
4. Conduct the post-implementation audit
5. Complete the final report
6. Submit to client

Format for Final Project Report

- Summary of Define : To develop a generic and inclusive PMP template that can be used by the IDPI managers to help make the management of educational project more effective and the sharing of instructional specialists more efficient.
- Summary of Plan: Objective were divided into several small activities representing the work breakdown structure (WBS). All the activities were sequenced to know the logical order of the activities and used critical path method (CPM) to determine the time required to complete this project.
- Summary of Organize: In the organize phase, the selection criteria for project manager and team members and organized the project team was created. After that, work packages were assigned to divide all the activities into several work packages according to the specialist responsible for those activities.
- Summary of Control: In the control phase, a Gantt chart and a variance report were created to represent all the activities that IDPI should do in order to accomplish each project goal, who are responsible for those activities, the start and end date of them as well as the status of those activities. Those two charts can help administrators and project manager to know in what phase the projects are and to determine variances from the whole project in order to take the corrective actions.
- Summary of Close: In the close phase, we prepared all the materials and the products and showed them to the clients in the meeting in order to finish the sign-off procedures. After that, we organized the post project audit and closed all the projects.

Final deliverable checklist

Final Deliverable Checklist	
	Project Overview
	WBS

	Project Network
	Critical Path
	Project Proposal
	Recruitment Criteria
	Work Package Description
	Work Package Assignments
	Variance/Status Reports
	Staff Allocation Reports
	Final Report

Present products to Client / Client Sign-off Procedures

1. Prepare all of the materials which need to be used at the meeting with our client (IDPI)
 - Deliverables
 - Final report
 - Presentation
 - Signature pages
2. Build sign-off team to meet with client
3. Seek relevant sign-off activities and prepare
4. Schedule the meeting with client to showcase project outcomes

Post Project Audit/Debrief

For the project Audit/Debrief the following action must be taken:

- Schedule a debrief meeting to share comments, questions, and suggestions on project and teamwork.
- Prepare a presentation of the final report and the handouts materials such as a summary of the project key points, further steps, and the project report for the stakeholders.
- Prepare an evaluation protocol and the actual evaluation survey for the stakeholders
- Prepare to share the most significant project challenges and how they were overcome, learnings from the projects and the teamwork, and overall success stories.
- Schedule a dinner for the team members finally performance evaluations and project manager performance evaluation, provide feedback and share successes.
- Complete final project audit to close all project activities.

APPENDIX A

Activity Estimates Table

Time – *in days*; Start schedule – *Period 1 (each period is 5 days)*

Activity No.	Activity Description	Sequence relationships		Estimated Time / Start	
		before	after	days	period
1.1	Create a shared calendar (online/offline) of important events that includes all who are involved in the courses development	0	1.2,1.3	5	
1.2	Implement an online discussion board for team discussions/questions on products	1.1		5	
1.3	Implement a monthly meeting for updates on new products, status of projects, and any other inquiry	1.1		5	
2.1	Conduct clients' instructional, audience, content, and environmental analysis in order to design <i>short instructors-led workshops</i>	0	2.2	10	0
2.2	Design instructional goals, objectives, content, and course evaluations and assessments for the short instructor-led workshops	2.1	2.3	30	2
2.3	Develop the TTT session and short instructor-led workshops	2.2	2.4	50	8
2.3.1	Develop the instructor guide	2.2	2.3.4	10	8
2.3.2	Develop the learner guide	2.2	2.3.4	30	8
2.3.3	ID formulate the course schedule/ flowchart instruction/ storyboard instruction	2.3	2.3.4	45	8
2.3.4	ID develop the TTT session after consulting the trainers	2.3.1, 2.3.2, 2.3.3	2.4	5	17
2.4	Conduct the TTT session and instructor-led workshop	2.3	2.4.1	3.5	17.7
2.4.1	Conduct the TTT session: the instructional designer train the trainer	2.4	2.4.2	0.5	17
2.4.2	The trainers who have completed the TTT session conduct the instructor-led workshop	2.4.1	2.5	3	17.1
2.5	Conduct formative evaluation, summative evaluation and cost-benefit analysis of the short instructor-led workshop..	2.4		120	17.7
3.1	Conduct Instructional Analysis, Audience Analysis, Content Analysis and Environmental Analysis of clients in order to design instructor-facilitated online courses.		3.2	40	0
3.2	Design content, instructional goals, objectives and assessments for the instructor facilitated online course.	3.1	3.3	120	8
3.3	Develop the TTT session and instructor-facilitated online courses.	3.2	3.4	200	32
3.3.1	Develop instructor resources: <ul style="list-style-type: none"> ● overview of course ● full syllabus ● description of audience ● content overview ● list of activities and evaluations ● suggested debrief guidelines 	3.2	3.3.4	60	32
3.3.2	Develop online resources: <ul style="list-style-type: none"> ● text ● graphics ● video ● simulation apps ● evaluations 	3.2	3.3.4	160	32

3.3.3	ID develop the course schedule/ flow chart instruction/ storyboard instruction	3.2	3.3.4	180	32
3.3.4	ID develop the TTT session for this online course	3.2.1 3.2.2. 3.2.1	3.4	20	68
3.4	Conduct the TTT session and instructor-facilitated online courses	3.3	3.5	125	72
3.4.1	Conduct the TTT session: the instructional designer train the trainer	3.3	3.4.2	5	72
3.4.2	Learners learn the course online facilitated by the instructors who have attended the TTT session	3.4.1	3.5	120	73
3.5	Conduct formative evaluation, summative evaluation and cost-benefit analysis of the instructor-facilitated online course	3.4		120	97
4.1	Conduct Instructional Analysis, Audience Analysis, Content Analysis and Environmental Analysis of clients in order to design self-study online courses		4.2	40	0
4.2	Design content, instructional goals, objectives and assessments for the self-study online course	4.1	4.3	120	8
4.3	Develop self-study online course	4.2	4.4	200	32
4.3.1	Develop learner resources: schedules, help guides, and support for accessing and completing courses	4.3	4.3.2	180	32
4.3.2	Develop digital resources: <ul style="list-style-type: none"> ● text ● graphics ● video ● simulation apps ● social media resources ● activities ● evaluations 	4.3.1	4.4	200	32
4.4	Learners learn all the learning resources online and by themselves.	4.3	4.5	120	72
4.5	Conduct formative evaluation, summative evaluation and cost-benefit analysis of the self-study online course.	4.4		120	96
5.1	Conduct formative evaluation, summative evaluation and cost-benefit analysis of instructor-facilitated online courses which are created by other organization.		5.2	120	0
5.2	Recommend enhancements to the organization according to the evaluation conducted by the evaluation team.2	5.1		20	24
6.1	Conduct formative evaluation, summative evaluation and cost-benefit analysis of self-study online courses which are created by other organization.		6.2	120	0
6.2	Recommend enhancements to the organization according to the evaluation conducted by the evaluation team.	6.1		20	24

APPENDIX B

Gantt Chart

APPENDIX C

Work Packages Descriptions / Assignments Table

APPENDIX D

Variance/ Status Gantt Report

Variance/ Status Gantt Report showing 25% less of the original time.