MANAGING PROJECTS & PREVENTING SCOPE CREEP

Cost of Ineffective Project Management

1. Real money, budgetary and to the company
2. Customer Satisfaction
3. Credibility
4. Future projects

Planning

1. Define the Solution – Use a diagnostic approach:
   a. Is there a training solution here?
   b. What is being done now?
   c. Is there a delta between current performance and desired performance?
   d. What are the budget and/or environmental constraints?
   e. What are the resource constraints (SMEs, logistics, computer access, etc.)?
   f. Are there ways to accomplish desired results that do not involve a training intervention?
   g. What are learner demographics (locations, learning styles, job demands, technical comfort, general culture)?
   h. What are the desired outcomes from the project?
   i. How much learner time is required for this project?
   j. What are your project funding restrictions?
   k. How will you measure success?

2. Scope Appropriately
   a. Provide insight to constraints (More time equals negative impact on deadline and higher project costs).
   b. Align Project Expectations with Subject Matter Expert (SME) Availability.
   c. Identify tasks with defined methodology for repeatable outcomes on timing and cost.
   d. Discuss risks uncovered on similar projects with potential solutions
      I. Present overall project plan to SMEs for input and buy-in.
      II. Set expectations for SME time involvement.
      III. Set expectations for review and revisions (and the limitations on number of reviews/revisions).
   e. Identify tasks with defined methodology for repeatable outcomes on timing and cost.
   f. Discuss risks uncovered on similar projects with potential solutions

   a. Evaluate deadlines and needs.
      I. How did the deadline get set?
      II. Is it possible to do deliver a solution by the deadline? Are there alternative approaches?
      III. What happens if the company (or the team) misses the deadline? Is it at all negotiable? (Is it a “soft” or “hard” deadline?)
b. Plan your talent resources.
   I. Quantify known talent and identify skill gaps.
   II. Identify resources to bridge known gaps.
   III. Ensure you’ve got buffers in this planning area to accommodate surprises and/or planned time off.
   IV. Determine appropriate tools.
   V. Set sustainable expectations.

4. Develop a communication plan.
   a. Aim for complete transparency.
   b. Plan a focused and comprehensive kickoff meeting that includes roles/responsibilities, goals, timelines and so forth.
   c. Plan for regular status updates.

5. Deliver on commitments by keeping fulfillment in mind when planning (schedule, resources, potential risks, etc.).

**Fulfillment**

1. Measure and manage to your plan.
   a. Productivity
      I. Set sustainable expectations for long term projects.
      II. Delegate for ownership (right-sized tasks that resources can dig into and own)
      III. Expect cycle peaks and valleys
         • Project ramp up requires learning curve for all
         • Resource turn over impacts everyone until replacement is found and trained
         • Parallel tasks keep team members producing at a steady pace
         • Serial tasks are more at risk for domino effect of single resource delays
      IV. Invest Time in team building
   b. Have a Quality Assurance (QA) process.
      I. Establish norms for frequency and depth of QA checkpoints and communication.
      II. Identify time and resources to make changes and repeat cycle.
      III. Ensure SME resource depth so QA is performed by independent SMEs.
   c. Communicate Progress
      I. Advise of any impacts to project as they occur.
      II. Provide early successes whenever possible.
      III. Be transparent.
      IV. Celebrate your success, loudly and often.
      V. Share the credit with the SMEs and sponsors.
      VI. Brag on your team.
   d. Formalize an approval process and establish version control and maintenance procedures.
2. Exception Handling: Managing Change of Scope
   a. You could have a scope change if your project has:
      I. A change in key players
      II. Additional content beyond original contract
         • Important to do a good job defining content up front
         • Not always a COS but important to document and communicate…it “adds up”
      III. Change in Timelines
         • The longer it takes, the more it costs.
         • For long delays, re-establish the timeline and evaluate impact to cost.
   IV. AND/OR You could have a scope change if your project is
      I. A software project
         • Need a stable environment.
         • Set clear expectations for changes to the environment.
      II. A project with new or undefined processes
         • Consider scoping the development of the process separately from training development.
         • If you try to do both for one price, you will go over!
   V. To handle scope changes when they happen:
      I. Plan, plan, plan – pay now or pay later!
      II. Communicate frequently…and document discussions and ask for agreement.
      III. Be honest…visibility and transparency are important.
      IV. Give options…let the customer know the options and costs associated with each and let them choose.
      V. Live with the decision…even if it’s not what you would choose. You did due diligence…

Implementation

1. Pilot required?
2. Learning Management System Integration?