

## 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
3. Schedule: Establish timelines and benchmark points.
  - 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?
3. Global roll out planning? Phased? Alternatives?
4. Debrief your projects. Evaluate for go forward.