

## **Introduction to Project Management**

Project management is a complex discipline which requires an individual to call upon multiple skills both interpersonal and organizational in nature to produce work that is finite and unique. Projects are as diverse as the industries from which they are born and the final product is “different in one or more ways from anything the organization has produced before” (Horine, p. 8). The project manager has an encompassing role surrounding the project, not only in managing the team but managing the process and politics around the project.

Instructional designers (ID) who manage projects must not only play all of the roles necessary to be a successful project manager but must also possess the skills of an effective instructional designer. Perfection is an easy text-book concept to understand but extremely difficult to achieve. Although training is not the solution for every organizational need, once the training/development need is validated by the stakeholders and organization, the instructional design process is developed from the project goals itself. A well organized ID project manager who is thorough with the processes and goals of the project will ensure that the project will see success in the end.

## **A Project Meets Success and Failure**

Gregory Horine outlines what the characteristics of the “ultimate successful project” (p. 30) but also cautions that this academic view is not always shared by organizational perspective and if all the criteria are not met, that the project can still be viewed as a success. Horine’s characteristics of the successful project would be a project that is:

- Delivered on time and as promised
- Completed within the allotted budget
- Delivered quality
- Achieved original purpose
- Met all stakeholder expectations
- Maintains a “win-win” relationship

Tracy Siudzinski, an Instructional Designer at SchoolsFirst FCU in California completed his Instructional Technology Masters at Southern California University recently but has many years of experience in the field, including managing ID projects. In an email, he offered several pieces of advice that has helped his projects, starting with the identification of the need for instruction. “During your assessment and interviews with key stakeholders, verify the need for training... If there is a need for training, don’t get tied down to one particular delivery method. Some projects are great for eLearning, some are great for ILT, and other might just call for a job aid or FAQ document... Bottom line, you need to make sure the delivery method fits the current organizational climate and need.” (Siudzinski) Thomas Garrod, a Learning Consultant and Chair and Keelworks Foundation, shared an experience which put this idea to life. “Keep in mind that project management is all about managing stakeholder expectations and keeping close communication. The first lesson I observed was when another instructional designer developed a great training program using cartoon characters. The stakeholder saw the completed project and rejected both the product and ID... No matter how good your work is, if it isn’t what the stakeholder wants, you are wrong.” (Instructional Design & E-Learning Professionals Group Discussion Board, Garrod).

Another aspect of Horine's characteristics that resonated throughout the professional community was scope alignment. Dr. Irene T. Boland, a Learning Consultant out of Orlando, Florida, addressed my inquiry on a discussion board with some sound advice concerning scope.

“There are three areas of project management that I see in all the projects I work on. They are schedule, budget and quality – all of which fold together to be called the Scope of the project. When you push hard on the schedule by seeking to get a project done quickly, it either costs more money to do (hire an outside firm, higher more expensive talent, hire more people in total) or becomes a lower quality project (do what you can with what you've got, and fast). This push-pull happens in all directions for these three areas” (Instructional Design Professionals Group Discussion Board, Boland).

In a phone interview with Anita Rosen, who is an ID consultant and President of ReadyGo, identified three important areas in her PM process that needed to align to be successful. First, she stressed the importance of goal setting and the essential step of getting management and subject matter experts to agree on specific goals. To my surprise, she told me “I find the easiest part is setting the goals because most people don't know what they are.” With a little direction people can start to flow in the right direction. Her next question was to answer “What kind of project is this?” Here, the PM needs to identify what kind of resources that will be needed, who are the resources and what type (and tools) of instruction will be suitable. “Instructional design is what you're going to use to make it successful.” From this, she can determine the cost of the project. The next step is “tactical”; address the scheduling, who, what when and where the resources are and making sure it meets the deadline for the project. Rosen acknowledges that this is merely the surface of the multitude of tasks which take place during the project, but assures that a PM, who is thorough, will meet the goals of the project and satisfy the stakeholders.

Quality of the project is a characteristic that Liz Ryan, assistant Registrar at the Irish Management Institute felt should be a focus across the board on projects. “If the instructional designer's sole focus is on getting the material written on time, then the quality of the work produced may suffer, and that affects the rest of the project: the editing takes longer, the material should go back to the ID for implementation of edits, then the graphic designer and programme has to adjust their schedules” (Instructional Design & E-Learning Professionals Group Discussion, Ryan). She goes on to list out steps that touch upon specific tasks to keep the project on track with quality.

### **A Valuable Token of Sound Advice**

A word of caution that resonated through the professional ID community was a trait that many project managers experienced and warned of the dangers that can effect not only the scope of a project, but can have the final word on its success in the end. Dr. Boland goes briefly but succinctly describes the culprit:

“As a client-facing instructional designer, you want to watch for something called “scope creep”. This is when the client asks for a little thing that just takes 5 minutes, and then another one, and another one. Soon, the project has expanded much larger than originally planned – but your budget and schedule have not. It is tempting to include one more really great thing in a course, but you have to be paid for it – if you respect the work that you do. So, work together with your project manager to determine when you can do a “little extra” in

the name of good customer service and when that “little extra” is out of scope and the budget may need to be re-negotiated” (Instructional Design Professional Group Discussion, Boland).

John Morgan, a Distance Learning Coordinator at General Dynamics recounts an experience of “scope creep” that put a horrible end to a project.

“I once worked on a \$16 million project developing a training simulator. The feature creep was so extensive that by the time the simulation was completed it was obsolete because new equipment had replaced the equipment that the simulator had been designed to simulate. The end result was that the customer was out \$16 million because their organization was required to pay for the simulation. The company I worked for was out \$5 million because of the expense of adding the features requested cost the entire program to run over budget” (Instructional Design & E-Learning Professional Group Discussion, Morgan).

John Morgan’s experience is a great example when “scope creep” takes over and the PM does not have control over the project or the organization.

### **What It All Comes Down To**

Horine mentions several key skills for a project manager to exemplify to successfully direct a project. Project managers must have good project management fundamentals, business management skills, technical knowledge, leadership skills and communication skills (p. 24). All of which are important, no doubt, but the practicing ID project managers I encountered all touched upon the importance of communication in some way or another. Without effective and efficient communication, be it between the team, with the stakeholders or between the project and the process, the project will not succeed without a leader who facilitates open communication.

The importance of communication starts before the project can even begin, communicating goals with the organization and stakeholders are extremely important to get the project started on the right track. Thomas Garrod stresses “Get documented approval before investing effort”. Anita Rosen also touched upon the importance of developing a well defined project document and the significance of stakeholders accepting and agreeing upon the elements within it. Additionally, she pointed out how important it is to have clearly defined roles that are understood by the project team members and maintaining open lines of communication regarding, tasks, deadlines and feedback within the team.

As my understanding of Project Management develops, it is important to identify the characteristics which comprise a successful project, just as it is important to recognize the symptoms that can quickly lead to failures. Although my experience may be limited, it is not hard to see how important it is to be familiar with the project management process. Also, as a project manager it is essential to strive to be the leader of facilitating effective communication in and around the project; with the members, the stakeholders and projecting the goals of the project to the execution process. The knowledge attained from open communication will help the project manager overcome obstacles, foresee problems and adapt quickly to ensure the success of the project.

References