Jack Waterkamp

Managing Scope Change in an Instructional Design Project

Case Analysis

Summer Winrotte

EDCI 672-006 Fall 2017

Key Stakeholder Roles & Primary Concerns

Stakeholder's Role	Stakeholder's Name	Stakeholder's Primary Concern(s)
Project Manager	Jack Waterkamp	- Jack wants to be "on senior managements radar for future executive team candidacy", and the new project will "give him another opportunity to demonstrate his leadership skills" (p. 259). - Concerned because "he had not made provisions for scheduling and resourcing any web-based CRM training, or for any modifications to the curriculum of Complex Data System's' other software products", he "immediately asked about times and resources" for the new plan (p. 261). - Relying upon his past experience, Jack thought "he would need three to four times his current resource levels to add web-based training to the new CRM curriculum" (p. 261). - Jack noted two action items following the announcement of the agenda item *New Training Directions*: "Revise the CRM Curriculum Development Project Charter to reflect the scope change resulting from the executive mandate" and then get it signed-off (p. 261). - By the end of the month, "have a revised instructional design document with a project plan for completing the work ready for Elizabeth's approval" (p. 261). - Jack thinks "that they [System Administrators] are the group that is most critical to CRM product success" (p. 261). - Jack wants to use a "two-week virtual work session" on the company's intranet to "work collaboratively to finalize [instructional design document] based on the SA target audience" (p. 262). - He wants the new training modules to be hosted in the "password-protected Clients Only section of the company website" because "our LMS hasn't been a hit with" the clients (p. 262). - After [Jack, Katherine, Lewis, and Melissa's] meeting, Jack "posted a revised CRM Curriculum Development Project Charter", and wanted their "electronic signatures on the charter if they agreed with his revisions" (p. 262). "Although Melissa had not 'signed', Jack felt that her last e-mail was sufficient evidence that she was aware of what was discussed and agreed" (p. 262). - In regards to Elizabeth's questions about Melissa's concerns, Jack suggests that Melissa might be "misremembering our goal of developing web-based training only for the system administrators to learn the product basics" (p. 263). - Jack things that Katherine Tracey's work with the "Marketing Communications folks on a series of information briefings to [CDS] clients" should "nip any potential misinformation in the bud" (p. 263). - Jack knew that a "next step was to figure out a way to incorporate online facilitation training into May's Tran-the-Trainer Week schedule", but "he and Melissa had not agreed

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		on how to include online facilitation" into the week (p. 264). Jack noted that Melissa "was not ready to delete anything from the standard program sessions" (p. 264).
		▪ Jack suggests to Melissa that they "start with 10 trainers that you select to participate" in "the online facilitation training as an online workshop", and that he will "develop and conduct the workshop" himself (p. 264).
		▪ "Three days before the start of Train-the-Trainer Week, Jack still did not have a list of trainers for the online facilitation workshop", so he sent out an e-mail announcing that the training was available but "participation would be limited to the first 10 trainers who responded" (p. 265).
		▪ To ensure participation, Jack decided that "all participants would receive a 16-GB USB flash drive", but knew he was taking a risk because "it would certainly cut into his project budget" (p. 265).
		▪ Because "the enthusiastic responses" were worth it, Jack "had to figure out a way to schedule more online workshops for the remaining 58 people", and find a way to "absorb the $1,7000 hit to his project budget for the flash drives" (p. 265).
		▪ As he "monitored the [Research & Development] area on the company intranet", Jack's "heart sank as he compared the beta testing target completion dates" with the "percentage of work completed", especially since "there was no indication on the graphics as to if and when that remaining work would be done" (p. 265).
		▪ "Jack was puzzled by the apparent delays in software beta testing", and was sure that the delays "would cascade into the software testing of the remaining modules" (p. 266).
		▪ Jack admitted he was still uncertain "as to what the final software product would contain, because Katherine was still working on restoring the remaining pieces of functionality" (p. 266).
		▪ In their weekly team meeting, Jack reminded his team "that the CRM software would be delivered in November with or without that functionality, and that it was his team's responsibility to deliver a sales-ready curriculum at the same time as the general delivery of software" (p. 266, 267).
		(Williams van Rooij, S., 2014)
Project Partner *Executive Sponsor*	Elizabeth Henderson	▪ In the HR monthly meeting, Elizabeth relayed that the "November delivery date for the CRM software product and training curriculum is not negotiable, nor is [Jack's] budget and staffing" (p. 261).
		▪ "[Elizabeth] thought it would be best if the entire division heard [about *New Training Directions*] at the same time" (p. 259, 261).
		▪ Phoning Jack, Elizabeth said that she couldn't "wait to hear [Jack's] explanation as to why Melissa thinks [he's] trying to eliminate classroom-based training" (p. 262).

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		• Elizabeth suggested that Jack "get moving with the communications plan", and that "the last thing [CDS, Inc.] need is a misunderstanding that leads to panic among clients and employees" (p. 263). (Williams van Rooij, S., 2014)
Client	J.W. Hamlin	• "J.W. has decided that the training curriculum for the new CRM product and for our other training offerings should include both web-based and classroom-based training" (p. 261). (Williams van Rooij, S., 2014)
SME *CRM Product Manager*	Katherine Tracey	• Katherine recognizes that the "trainers need to keep up with the times" and does not see a problem with *New Training Directions* (p. 262). • She acknowledges that "[*New Training Directions*] is what [CDS, Inc's.] CEO wants" (p. 262). • Katherine called Jack regarding a "tiny glitch" for which "a few critical pieces of functionality failed to be programmed into the software", noting that they had "no automated direct mail, no database merge-purge of duplicate entries, and only one entry field for e-mail addresses" (p. 266). • Due to the "tiny glitch", Katherine told Jack that the "application end-user classroom sessions covering that functionality [would] have to be skipped during field testing" (p. 266). • Katherine also noted that "several of the technical procedures required for system implementation have been altered, making three of the seven online modules in the SA track inaccurate" (p. 266). • Katherine is "working on getting the missing functionality restored and field tested in time for general delivery, but the technical procedures" will still be an issue for three of the seven modules (p. 266). (Williams van Rooij, S., 2014)
Project Partner *Software Product Development*	Lewis Ramirez	• Lewis believes that "SAs are tech savvy" and so they "aren't as scared of online training as some of the functional users who are subject matter experts" (p. 261). • While the functional users of the software will be subject matter experts, Lewis says that they "know little about what's under the technology hood" of the software (p. 262). • Lewis points out they have seen "how well [online training] works with SAs from the high satisfaction ratings for those online refresher courses" (p. 262). • Lewis told Jack to "work with Tom Slade in Operations" on how/where to host the training modules (p. 262). • When Jack went to Lewis's office to address some questions regarding beta testing, Lewis said that he was "on [his] way to

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		put out a fire", and the he would "get back to [Jack] as soon as [he] could" (p. 266). (Williams van Rooij, S., 2014)
Project Partner *Implementation*	Melissa O'Connell	▪ Melissa is concerned that none of her trainers possess "experience with online training" (p. 261). ▪ She made it clear that is not willing "to have [her trainers] give up billable days in the field for them to learn how to train online", potentially ruining "a great record of high client satisfaction ratings" (p. 261). ▪ Melissa is "not convinced that the self-paced approach [Jack] used for the online refresher courses would work for new product training, even with SAs" (p. 261). ▪ Before she signs the "revised CRM Curriculum Development Project Charter", Melissa asks Jack to "highlight or bold the concerns that [Melissa] expressed at the meeting" (p. 262). ▪ When being asked her thoughts about the online training delivery, she told Jack "you're the expert" (p. 264). ▪ Melissa sent Jack an email "agreeing to the program if it would contribute to the overall success of the project", and in the email "she also promised to send out a call for volunteers to her trainers asking them to e-mail Jack if they would like to sign up for his online facilitation workshop" (P. 264, 265). ▪ Concerned that her "client satisfaction and trainer satisfaction rations" will be blown out of the water, Melissa asks Jack "about errors in the we-based modules" (p. 266). ▪ As she stormed out of Jack's office, Melissa stated that "this debacle is proof that web-based training doesn't work for new products" (p. 266). (Williams van Rooij, S., 2014)
Project Partner *Training Module Hosting*	Tom Slade	▪ Tom has "been hoping that we'd replace [CDS's LMS] clunker of a system with something that's easy to maintain and doesn't add to [Tom's] budget" (p. 262). (Williams van Rooij, S., 2014)
Project Partner *Product and Training Sales*	Larry Edwards	▪ While Larry is "on board with this web-based training thing", he is concerned that his "folks don't have any pricing information or whether the clients get to choose their favorite trainers" (p. 264). ▪ Larry told Jack that he needed the CRM pricing "now" because they've "fired up the clients with those webinars and [Jack] know that our competitors have been offering training online for as little as $150 a pop" (p. 264). ▪ Larry hopes that "the new pricing won't be a show stopper for new CRM sales", because "if nobody buys, you've got nobody to train, online or otherwise" (p. 264). (Williams van Rooij, S., 2014)

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Developer *Project Programmer*	Jerry Burns	▪ Jerry pointed out that they've "already scheduled the updates to other workshops in [they're] training inventory", and asked if they should cancel those (p. 266). ▪ In response to Jack, Jerry said, "I've been here 11 years and can't remember when software beta testing has gone off without a hitch" (p. 266). Jerry also added that he would "bet there will be a few more unpleasant surprises that are going to land in our laps" (p. 266). (Williams van Rooij, S., 2014)
Developer *Project Graphic Artist*	Not Identified by Name	▪ Information was not specified.
Developer *Project Audiovisual Specialist*	Not Identified by Name	▪ Information was not specified.
Audience	System Administrators (SAs)	▪ Information was not specified.
Project Partner	Executive Team	▪ The "executive team did not mandate a timeframe for developing web-based training for [CDS's] existing product line" (p. 261). (Williams van Rooij, S., 2014)
Project Partner	Marketing Team	▪ "The Marketing Team had launched a series of webinars announcing Complex Data Systems' plan to include web-based training opportunities for system administrators" (p. 264). (Williams van Rooij, S., 2014)

ID Challenges & Case-specific Constraints

1 ID Challenge / Case-specific Constraint	2 Classification		3 Priority	4 Rationale for Priority Indicator
	ID Challenge	Case-specific Constraint		
ID Challenge – Design Change in Project Scope Prior to the HR February meeting, Jack had just "learned that the instructional design	X		1	Due to J.W.'s mandate, the CRM product "should include both web-based and classroom-based training" (p. 261). The entirety of the project rests on the 're'design to include web-

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document he had written for the training curriculum for the new customer relationship management (CRM) software product was approved and ready to move into development" (p. 259). Unfortunately, at the meeting, Jack learned that his previously approved instructional design document would need to be adjusted according to a directive from J.W., the CEO. Elizabeth noted "that the November delivery date for the CRM software product and training curriculum [was] not negotiable" (p. 261). With this in mind, Jack had to determine the project's revised objectives, including web-based training, and available resources. As he left the meeting, Jack noted items that needed to be addressed following "the scope change resulting from the executive mandate" (p. 261). It was made clear in the meeting that the "budget and staffing" for the project was non-negotiable (p. 261). While Jack did adjust his design documents, he did not take into account the resource needs. When referring to the *Design* phase of the ADDIE model of instructional design, one must note that resources must be identified. The identification of available resources will dictate specifics regarding the design (and then future development) of the decided upon instructional strategy and specifications for project prototypes. (Williams van Rooij, S., 2014)				based training. Jack has no choice but to acknowledge and implement the change in project scope. Before proceeding further, Jack needs to revisit the initial mandate and determine if the design changes he has begun implementing do not meet, meet, or exceed the mandated inclusion of web-based training. While Jack's team is already developing the web-based training, Jack needs to reconsider if their development exceeds the required web-based training inclusion. This will lead to Jack revisiting the *Design* phase of the ADDIE model of instructional design. This must happen before moving forward, and continuing the development of the web-based portions of the training.
ID Challenge – Development Development of CRM software is riddled with communication issues During the *Development* phase of the ADDIE model of instructional design, instruction/training materials will be created. It is difficult to create the desired and specified products when lack of communication and miscommunications abound. For example, as a follow-up to Jack's initial meeting with Katherine, Lewis, and Melissa, he "requested their electronic signatures" on the revised project charter "if they agreed with his revisions" (p. 262). While "Katherine and Lewis submitted their	X		3	Once the new project scope has been addressed (Priority 1) and it has been determined how to utilize the previously approved budget and staffing constraints (Priority 2), Jack can move ahead with the development of the product.

1 ID Challenge / Case-specific Constraint	2 Classification		3 Priority	4 Rationale for Priority Indicator
	ID Challenge	Case-specific Constraint		
electronic signatures as requested", Melissa did not provide an electronic signature (p. 262). Instead, in an email reply, Melissa noted Jack's voicemail and that she received "the link to the intranet workspace" (p. 262). Instead of clarifying why Melissa chose not to sign the amended document, Jack assumed "that her last e-mail was sufficient evidence" that she agreed with the revisions noted (p. 262). Additionally, Elizabeth asks Jack to explain "why Melissa thinks [Jack's] trying to eliminate classroom-based training" (p. 262). Elizabeth notes that Jack should "get moving with the communications plan" because the "last thing we need is a misunderstanding that leads to panic" (p. 263).

(Williams van Rooij, S., 2014) | | | | |
| **Budget/Staffing Constraint:**

No additional funds or staffing allotments were provided with the web-based training mandate

For the initial project, Jack has budgeted $280,000 and his own staff, which included "one graphic artist, one audiovisual specialist, and one programmer" (p. 261). Based on his knowledge of the industry, Jack "would need three to four times his current resource levels to add web-based training to the new CRM curriculum" (p. 261). To accommodate software changes, "three web-based modules would still have to be reworked" (p. 266). While his programmer, Jerry, acknowledged that he "can't remember when software beta testing has gone off without a hitch", Jack's team "balked at the idea of having to redo three of the web-based modules" (p. 266). For Jack's three-person team this means additional work hours without additional man power or compensation.

(Williams van Rooij, S., 2014) | | X | 2 | Addressing this case-specific constraint cannot be done prior to determining how the new project scope will impact the design of the project materials (Priority 1). Once Jack has clearly determined how the new project scope will impact the project, he can move forward with determining how to allocate the previously budgeted and approved staffing and monies to meet the costs of the development needs. This must be done before proceeding further with development of the web-based portions of the CRM product. |

Assigned Readings, Your Previous Experiences and Your Understanding of the Case Problem

Before teaching in my current role, I taught at the high school level for six years. For five of those years I was the Junior Class Sponsor. Part of my role as Junior Class Sponsor was to be the 'project manager' for the prom committee. The prom committee consisted of the junior class president, vice president, secretary, and any other junior who wanted to volunteer. Two of my main responsibilities were to keep track of the budget and to make sure that clear communication was achieved between various sub-committees within the greater committee. One of the most important lessons I learned was that it is difficult to consistently communicate clearly and effectively. While I had heard my mom say time and time again that it is always best to communicate everything in two ways, I did not put much stock in it until this experience. It was rare that all of the committee members would naturally communicate in the same manner (email, face-to-face, phone, etc). It became clear that communication needed to happen through our learning management system (LMS) and through the announcements over the PA system. While some students thrived on seeing the announcements in the LMS, other students listened intently to the PA announcements. In comparison with this case, Melissa does not seem to respond well to Jack's communication techniques. This might be a time when Jack needs to think of the preferences of the people he is working with. Instead of assuming Melissa's thoughts due to her lack of communication in the manner he requested, Jack should attempt to communicate with Melissa differently. In regards to my prom budget, it became clear in my second year of sponsorship that the prom budget was less fixed than I originally assumed. Many variables, outside of my control, impacted the prom budget. So while the prom committee had a beginning amount that we began planning from, it was likely that we would either see the budget expand or dwindle without notice. Each time that happened, we had to stop and re-evaluate our prom design according to the budget fluctuation. This is similar to situation in which Jack found himself. The scope of the project was increased, but the budget was not. Jack had to take a step back and look at the design within the new project scope.

While reading this case I continued going back to the idea that good communication is the foundation to project management, which was confirmed by both additional readings. As Zulch (2014) states, "the project manager will not achieve anything without communication skills" (p. 176). Communication is key, and effective communication "cannot be understated" (McFarland, 2002, p. 128). Project managers must not stop at communicating project goals and team roles, they must also continue "communicating agendas, providing structure to team meetings, evaluating group process and progress", and "effective planning and analysis" (McFarland, 2002, p. 128). The additional articles encouraged me to think more about Jack's management and communication style. Jack concluded his initial meeting with Katherine, Lewis, and Melissa by planning a "two-week virtual work session" on the company's intranet (Williams van Rooij, S., 2014, p. 262.). Jack requested that each person sign the revised project charter that was posted to the intranet space. Lewis and Katherine signed the revised charter, but Melissa did not. Zulch (2014) states that "managing others effectively requires attention to hear what others are saying" (p. 178). I would also add that it requires the manager to also hear what others are *not* saying. In this case, Jack needed to pay attention to what Melissa was *not* saying as she chose not to sign the revised project charter. As project manager, Jack should have scheduled a time to meet with Melissa, on her terms, because a good project manager would "adapt [their] style according to the situation" at hand (Zulch, 2014, p. 180). Jack's perspective was that "her last e-mail was sufficient evidence that she was aware of what and agreed" upon (Williams van Rooij, S., 2014, p. 262.). In the end, Jack need Melissa to not just be aware of the project, but on board with the project.

Solutions, How They Address Challenges and Case-specific Constraints, Pros & Cons

1 Solution #	2 Possible Solution	3 ID Challenges and Case-specific Constraints	4 How Does It Address the Design Challenge(s) and Case-specific Constraint(s)	5 Pros	6 Cons
1	With the lack of beta testing completion, software functionality failures, and alteration of technical procedures required for system implementation, Jack is acutely aware of low budget funding and lack of additional staff support. Without a change in budget constraints, the CRM product will not be completed with high fidelity. Reviewing the mandate from J. W., the CRM product "should include both web-based and classroom-based training" (Williams van Rooij, S., 2014, p. 261). Additionally, the revised CRM project scope detailed the need to "determine which [current CRM training topics] can be parsed to include web-based as well as classroom-based components" (Williams van Rooij, S., 2014, p. 269). Jack is facing two critical development issues: functionality issues due to programming and issues surrounding altered technical procedures. The functionality issues impact all of the web-based product, whereas the altered technical procedures only impact three of the seven modules.	**ID Challenge # 1:** *Change in Project Scope*	By revisiting the initial mandate from J.W., Jack will clarify the essential elements of the project scope. He will make sure that the altered project scope will include the essential elements, and will determine which elements can be dropped or changed to fit within allocated resources.	▪ The CRM product will include web-based portions of training ▪ Katherine's team will be able to focus on restoring the functionality in time for field testing and general delivery ▪ With Jack individually making the decisions regarding the redefinition of the project scope, the project course can be changed immediately	▪ Jack runs the risk of not completing the project according to the executive team's initial desires ▪ The SA Installation Foundations training will no longer be asynchronous, but instead will dictate that participants attend physical meetings at specific times/places
	Jack will redesign CRM's System Administrator (SA) track. Jack will modify the Installation Foundations from a web-based scenario to a blended-learning scenario. Instead of focusing his resources on redoing three of the web-based modules, he will support Katherine and her team as they are "working on getting the missing functionality restored" in time for field testing and the November project delivery date. The three trainings that had altered technical procedures will be implemented in a classroom-based scenario. Following the implementation of the blended learning scenario for SAs, an evaluation will take place to determine if blended learning is desirable or if full web-based training scenarios are ideal. Future web-based training scenarios will be on-hold until the evaluation and results are completed, compiled, and interpreted.	**ID Challenge # 2:** *Development of CRM software is riddled with communication issues*	Jack has had specific communication issues with Melissa and Lewis. The proposed solution takes in to account the need for individual communication to address specific concerns in conjunction with certain aspects of the project. It also forces each key players to acknowledge the scope of the alterations and the impact it will have on their individual team's work.		
		Case-specific Constraint # 1: *No additional funds or staffing allotments were provided with the web-based training mandate*	The solution recognizes that there is not enough monetary or time resources to complete the project with high fidelity by November. In order to allocate necessary resources, the solution prioritizes the needs as necessary or not necessary, allowing the team to focus on a narrower set of issues to fix.		

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	Jack will be proactive in his communication regarding the scope change. He will identify all key players will be impacted by this scope change and touch base with each of them individually, in person. This way, Jack will be able to answer specific questions associated with the part of the project the key player supports. This will help to minimize miscommunication, while promoting communication.				
2	With the lack of beta testing completion, software functionality failures, and alteration of technical procedures required for system implementation, Jack is acutely aware of low budget funding and lack of additional staff support. Without a change in budget constraints, the CRM product will not be completed with high fidelity. In order for the project to move forward, Jack and his team must first move backwards. He recognizes that not everything within the project scope can continue as previously determine. Since potential changes to the project scope will impact everyone, Jack will call a brainstorming meeting regarding the project scope. The purpose of the meeting is to discuss possible project scope alterations that might positively impact the completion of the project. Prior to the meeting Jack will send out an invitation for the attendees to submit agenda items to be addressed. Two days prior to the meeting, if Jack has not heard from an attendee he will reach out either by phone or in-person until he touches base with that person. Following the brainstorming meeting, Jack will take in to account all team member viewpoints and determine the best possible scenario in which to move forward. At that point, he will revise the CRM Curriculum Development Project Charter to mirror the determined changes. The revisions will include changes to the project scope, how they will be accomplished, and the communication mechanisms that will be followed to maintain a level of working knowledge among all team members.	**ID Challenge # 1:** *Change in Project Scope* **ID Challenge # 2:** *Development of CRM software is riddled with communication issues* **Case-specific Constraint # 1:** No additional funds or staffing allotments were provided with the web-based training mandate	By recognizing the need to stop and revisit the previously determined project scope, Jack and his team admit that there needs to be a change in order to complete the project on time with high fidelity. The change in project scope will be addressed through the brainstorming meeting, and Jack's subsequent scope decisions. This solution addresses the need for multiple forms of communication, at multiple times, so that miscommunication does not occur. It also takes into account that Jack needs to be proactive in his communication regarding the project. This solution recognizes that no additional funds were afforded to the project when it was mandated to include web-based training. This knowledge is well-known; therefore, it is expected that the proposed design changes will take into account the lack of additional resources.	▪ All team members have a voice in the necessary project changes ▪ Team members will likely have more personal buy-in to the final product, smoothing the way through each the creation and testing of each individual component ▪ Jack can use this opportunity to showcase better leadership and communication skills	▪ Utilizing a group brainstorming process to redefine the project scope will take longer than if just one person refines the scope ▪ The time-line to complete the group brainstorming process, and then final definition of the project scope, may be impossible with the November deadline

1	2	3	4	5	6
Solution #	Possible Solution	ID Challenges and Case-specific Constraints	How Does It Address the Design Challenge(s) and Case-specific Constraint(s)	Pros	Cons

Final Recommendation

While both solutions take in to account the need to readdress the project scope, they are not equal in impact. Choosing the solution that has less overall negative impact is desirable. It is recommended that Jack will redefine the CRM project scope, leading to a redesign of the CRM's System Administrator (SA) track. Modification of the Installation Foundations will involve moving from a completely web-based scenario to a blended-learning scenario. Instead of focusing his resources on redoing three of the web-based modules, he will support Katherine and her team as they are "working on getting the missing functionality restored" in time for field testing and the November project delivery date. The three trainings that had altered technical procedures will be implemented in a classroom-based scenario.

Jack will place a high level of his focus on being proactive in his communication regarding the scope change. In order to do this, Jack will identify all key players that will be impacted by the change in scope, and touch base with each of them individually, in person. Jack will answer all specific questions associated the project, specifically with the components that the key player supports.

Justification

It is not often that a perfect scenario or solution exists. That is never more true than in this case. The case itself if is riddled with leadership, communication, and budget/constraint issues, and those are the issues that can be seen easily in through the maze of staffing and project details. The high number of stakeholders mentioned in conjunction with a very limited amount of information about the actual (desired) product, and the fact that the role of ID'er is not clear, make choosing any solution a gamble. While that is true, the reality is that Jack must move the project forward, which means that he must implement a solution. Jack must choose the first proposed solution scenario. It is late September, and the time constraint is of top importance. As Jack reminded his team members, "the CRM software would be delivered in November" (Williams van Rooij, S., 2014, p. 266). Unless Jack immediately redefines the project scope and begins altering next steps, the product will not be viable by the November deadline. The solution also provides Jack with a framework to better his communication with key team members and stakeholders. While there will be issues to address, the positive impact of the recommended solution outweighs the potential pitfalls associated with other solutions.

References

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