



Collaboration is Key: Why it's important to include learning and support partners in project teams

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Overview

- ▶ The best projects bring together the right resources at the right time.
- ▶ Today, we will learn about why, when, and how to collaborate with learning and support partners as well as some of the pitfalls that occur when the right partners are not involved.
- ▶ Examples of projects with successful and unsuccessful collaboration efforts will be cited.

Project Manager Origin Story

- ▶ Working as an intern during my masters program in instructional technology (often called learning design and technology) in 1995
- ▶ Assigned to a Web design project (yes, in 1995!)
- ▶ Manager said: “Take the bull by the horns and get it done.”
 - ▶ “Take the flower by the thorns.”

Career Highlights

- ▶ AT&T Interactive Products and Services (1995 -1997)
 - ▶ Master of science in instructional technology (1996)
- ▶ Bank of America (1997 – 2009)
 - ▶ Green Belt with design for six sigma certification (2008)
 - ▶ Doctorate in Educational Leadership (2011)
- ▶ PMP in 2010
- ▶ Project management consulting (2011 – 2015)
 - ▶ Higher education, facilities, fundraising
- ▶ Online teaching and advising (2011 – present)
 - ▶ Masters and doctoral students
 - ▶ Doctoral research projects
- ▶ PMI Nashville PMP Study Group Coach
- ▶ PMI Nashville Vice President of Administration

Objectives

1. Define the typical roles that learning and support partners play in projects.
2. Understand the value of creating collaborative project teams.
3. List ways that learning and support activities can be incorporated into the overall project plan.

Quick Response - Notecards

- ▶ Think about a recent project. Who was invited to the kickoff meeting?
 - ▶ List those roles on your notecard.
- ▶ Share only if you choose.
- ▶ Keep your notecard. You will use it again at the end of the presentation.

Objective 1: Define the typical roles that learning and support partners play in projects

- ▶ What is learning and support?
 - ▶ Goes by many names... performance support, learning design, training, learning and development, instructional design, etc.
 - ▶ Expertise in change management, project management, technical writing, communication, instruction/facilitation, learning technologies, etc.
 - ▶ Involved in creating solutions that support those affected by the change that the project will bring
 - ▶ Learning and support partners will need **access to subject-matter experts (SMEs)** in order to conduct task analyses. define entry-level behaviors, create performance objectives, etc.
 - ▶ Stakeholder analysis should identify all those affected by the change (inputs, processes, outputs)
 - ▶ Learning and support partners have their own processes that involve analysis, design, development, implementation, and evaluation (more on that later...)

Objective 1: Define the typical roles that learning and support partners play in projects

- ▶ A few examples of learning and support solutions
 - ▶ Training (in person, virtual)
 - ▶ Just-in-time online support embedded in the “system”
 - ▶ Help desk
 - ▶ Online or paper documentation (quick reference cards)
 - ▶ Mentoring/shadowing
 - ▶ eLearning
 - ▶ Simulations (virtual reality)
 - ▶ Apps
- ▶ The learning solution must meet the needs of the project and support those affected by the change.

Objective 1: Define the typical roles that learning and support partners play in projects

► Project examples

- AT&T Customer Network Service Center (online decision-support system) - 1996
- Bank of America Change Performance Center (Web instructor-led learning, global interactive business television network) - 2005



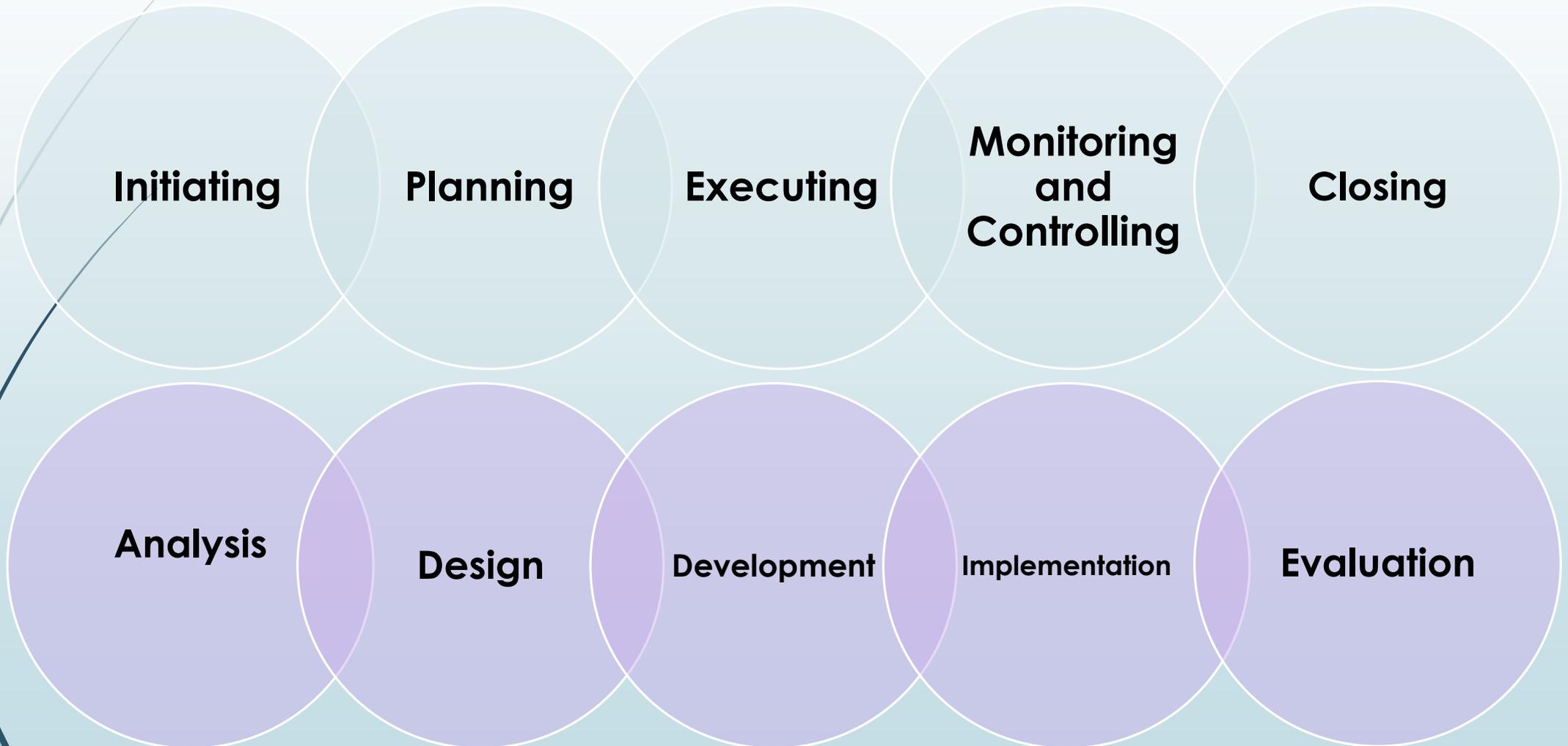
Objective 2: Understand the value of creating collaborative project teams

- ▶ Collaborative
 - ▶ Working hand-in-hand, supportive
- ▶ Inclusive
 - ▶ Relying on the strengths and expertise of your project team

Objective 2: Understand the value of creating collaborative project teams

- ▶ Complimentary strengths
 - ▶ Project management models
 - ▶ Project Management Process Groups: Initiating, Planning, Executing, Monitoring and Controlling, Closing (PMBOK, 2017)
 - ▶ Learning design models
 - ▶ ADDIE: Analysis, Design, Development, Implementation, Evaluation (Dick, Carey, & Carey, 2009)
 - ▶ ASSURE: Lesson planning, mostly PK-12 (Smaldino, Lowther, & Russell, 2012)
- ▶ Project management and learning design models are flexible and continue to evolve
 - ▶ Project management – waterfall, agile, iterative, hybrid
 - ▶ Learning design – recursive/reflective (Willis, 1995), layers of necessity (Tessmer & Wedman, 1990)

Objective 2: Understand the value of creating collaborative project teams



Objective 2: Understand the value of creating collaborative project teams

► Project Examples

- American Cancer Society (Relay for Life event logistics) – 2003
- Charlotte Preparatory School (fundraising campaign) - 2015



Objective 3: List ways that learning and support activities can be incorporated into the overall project plan

- ▶ When should learning and support partners engage in the project?
 - ▶ Early and often! Think RACI - the role evolves over time from just being "informed" to being "fully accountable."
 - ▶ Keep learning and support partners involved in ongoing collaboration with the project team, particularly when the design of the "system" is not final.
 - ▶ "Building the car as it drives down the road."
 - ▶ Have a test system that reflects the final system when users must be prepared and supported in at the same time the system as it goes live.



Objective 3: List ways that learning and support activities can be incorporated into the overall project plan

- ▶ What are the learning and support activities needed to support a project?
 - ▶ Audience analysis, task analysis, environmental analysis, etc.
 - ▶ Learning and support partners need a complete understanding of the change and how it will affect those involved.
- ▶ How can learning and support activities be integrated into the project plan?
 - ▶ Collaborate! Start with a conversation to understand the needs.
 - ▶ Learning and support partners often manage projects of their own that might roll up into a larger project plan.
 - ▶ These learning projects will have their own testing and pilot cycles for the materials needed to support the project.

Objective 3: List ways that learning and support activities can be incorporated into the overall project plan

► Project Examples

- Bank of America Global Corporate and Investment Banking (compliance training) – 2009
- Charlotte Preparatory School (STEM enhancements/construction) - 2014



Pitfalls

1. Implementing a project without training or support materials in place
 - ▶ Project goals will not be realized if people and systems are not prepared for the change.
2. Not involving learning partners in planning or keeping them involved as the project progresses
 - ▶ It's much harder for any support partner to jump in at the end of a project.
3. Performance support built into the system is ideal but rarely well executed.
 - ▶ Investigate this option jointly with IT and learning and support partners.
 - ▶ If the system is designed to be intuitive, the learning solution may be minimized.
4. Limited or no access to subject-matter experts (SMEs)

Review and Reflect

Objectives Review

1. Defined the typical roles that learning and support partners play in projects.
2. Discussed the value of creating collaborative project teams.
3. Listed ways that learning and support activities can be incorporated into the overall project plan.

Using the notecard you have at your table, write at least one thing that you will take away from this session.

References

- ▶ Dick, W., Carey, L. & Carey, O. (2009). *The systematic design of instruction* (7th ed.). Upper Saddle River, NJ: Pearson.
- ▶ Project Management Institute, Inc. (2017). *A guide to the project management body of knowledge: PMBOK guide* (6th ed.). Newtown Square, PA: Project Management Institute.
- ▶ Smaldino, S., Lowther, D., & Russell, J. (2012). *Instructional technology and media for learning* (10th ed.). Upper Saddle River, NJ: Pearson.
- ▶ Tessmer, M., & Wedman, J. (1990). A layers-of-necessity instructional development model. *Educational Technology Research & Development*, 38(2), 77-85.
- ▶ Willis, J. (1995). A recursive, reflective instructional design model based on constructivist-interpretivist theory. *Educational Technology*, November-December 1995, 5-23.

Thank you!

What questions do you
have?