EDCI 67200 Case Study 4, Jack Waterkamp

Alicia King

Purdue University

Stakeholders

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| **Stakeholder** | **Role** | **Concern** |
| Jack Waterkamp | Lead Designer | Jack’s main concern is making sure his team can prepare a web-based training for the system administrators in addition to the classroom training in time for the curriculum launch in November. He is in the middle of the project, but is running into complications. |
| Elizabeth Henderson | Human Resources VP | Elizabeth’s concern is to keep revenue up and to please executive, J.W. Hamilton, with her division. |
| Employees of Complex Data Systems | Audience | Their main concern is learning about the customer relationship management (CRM) software and keeping up with their current performance levels. Specifically, the system administrators are the audience for the web-based trainings on the CRM. |
| Complex Data Systems | Client | Their concern is training the employees on CRM. This will hopefully provide a better connection between employee and the customer. |
| Katherine Tracey | SME | Katherine is the CRM product manager and her concern is that Jack efficiently can create the two training programs necessary to move forward with the project. |
| Lewis Ramirez | SME | Lewis is a software developer. He appears to be very busy throughout the case study. He is putting off helping Jack during part of the project because he is concerned with other projects. |
| Melissa O’Connell | SME | Melissa is director of client training services. She is worried about the success and well-being of her trainers. She also mentions her concerns of keeping client satisfaction high. |

Key ID Challenges

Development seems to be the biggest Instructional Design challenge that Jack will face. We are introduced to Jack in the middle of a large scope change. He needs to develop a web-based training as well as to continue developing the classroom-based training. There are many stakeholders in this process which makes this project even more vital to ensure unity in all parts. The little implementation that has happened with the trainers have been very successful.  There are even reports of clients ready to invest in this new product. However, there are some major issues that have happened during development that have caused disconnect between the product and instruction. These must be sorted to eliminate the gap and program flaws before moving forward with the rest of implementation. The “Analysis” stage has been completed and the audience and content has already been assessed. I originally felt there was a “Design” flaw, but the content and the process of sharing this content are not the issue. It is the bringing of this content to life that has been the dilemma for Jack. The “Implementation” stage, so far, has also been proven to be well received by the trainers and does not seem to be an issue for Jack.

Case Specific Challenges

Jack’s biggest issues when you examine the case study are clearly in regards to challenges in the Development stage of ADDIE. Some of his challenges include:   
 - Behind on GANTT chart

- Non-Negotiable Funds and Timeline

- Critical functionality pieces are not working in Beta testing

- Overall Project management

- Scope of project has changed

Prioritization and Rationale of Case Specific Challenges and ID Challenges

Jack’s priority and his main challenge is to manage the project better.  Learning to manage people and deadlines can be tricky. However, no forward movement can happen if miscommunication and disconnects are still happening. Next, he needs to figure out the current scope of his project and address any flaws to their current timeline. Right away he needs to address the “Development” stage of ADDIE. I would argue that he needs to be able to manage his team and project a bit better before developing or fixing any more of the software. I think the scope of the project can then be reassessed for concrete ideas on how to move forward and how to address any issues in a planned and organized way. This will also include getting the GANTT chart back on schedule. The GANTT chart will need to be redone to meet new timelines and to address issues such as the problems with functionality in the software. The whole-time Jack is addressing these items in an organized and prioritized way, he also needs to keep his non-negotiables in mind. He was given freedom with how he uses his time, but the ultimate November deadline cannot change. He has also been noted as dipping into his project budget for items such as flash drives. His budget is also a non-negotiable that cannot be touched for extra support.

Reading Connections

In the article, “Parallels Between Project Management and Instructional Design” by Jacqueline Layng (1997), we are introduced to four phases of a project. These phases are listed as conceptualization, planning, execution and termination. Jack has completed the first two phases beautifully, however, he has experienced disconnect in the execution phase. In this phase a project manager should be working on developing the different pieces of a project. The article suggest that all steps of the process rely on how well the project manager can communicate with the entire team. Jack's team understood their role, but not all members embraced or acted on the responsibility that came with their role. The article addresses the responsibilities of the project manager and the instructional designer. Jack is having to wear both hats in this case study. This is not uncommon, in the workplace. It appears the content he helping develop has not suffered. However, he may have given too much attention to the content which has impacted how well he can manage the project. Finding this balance for the remainder of the project length will be his professional goal and a challenge for Jack.

Personal Connections

Miscommunications can be very common in any workplace. Very complex miscommunications can happen when working with groups of people on one project. I have experienced this multiple times. Taking short cuts such as not informing all members of a group about a change can cause serious problems. While I was working on the budget process as treasurer of an organization, extra numbers were calculated and formulated into a system without anyone knowing including myself. Not everyone was informed by our president that there had been a major change and a group would be asking for an allocation. We had to re-run numbers and it was very confusing for all parties involved. We solved it by sitting collectively as an executive board and discussing the process until errors were clear. Although different from Jack’s situation, I believe my experience still demonstrates the need for unity and clarification when working on such projects to avoid double work for individuals.

Solutions/Recommendations

Jack’s first solution is to first establish ground rules or regulations to better manage his team and the project. A simple fix that could benefit the communication errors would be to establish regular face-to-face meetings with all, part or an individual from the team as necessary. He also needs to include Elizabeth on these conversations and meetings. In the nextmeeting, all stakeholder will need to be informed of the current situation. I believe updating the GANTT chart together will also be beneficial. Once Jack has brought the team together and has communicated the severity of the situation, it is then left to Jack to constantly observe and assess his team as appropriate. Jack will need to stay vigilant as they proceed and strength his project management skills. Hopefully with his team viewing him as more of the project manager, this will encourage them to keep up with their responsibility. If Jack had started strong communication channels earlier in the project, this could have been avoided.  
 Jack’s second solution is to release the software in its Beta form. Due to the Lewis’ team feeling overworked and the delay in the beta-testing, it may be helpful for them to release the software with the bugged functionality taken out of the program all together. The software could still be released and the project could move forward the same, with the understanding that it is still in development. The customers should also know that the promised functions will still appear in the training modules and the functions will be released as soon as possible. There are not any conflicts in the design, but the development of the software has not been as smooth as Jack would have wanted. The development is still far behind. Although, this solution does not help the software issues directly, it will allow for the software team to move forward in a calmer environment. I believe there will need to be a lot of implications for other stakeholders due to this approach, but the rest of the curriculum will have a chance to be launched on time.

Pros and Cons

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| **Solution** | **Corresponding Case Specific Challenge** | **Pros** | **Cons** |
| #1 Establish a more systematic approach to the project (Development) | Behind on GANTT chart | Restructuring the GANTT chart in a face-to-face meeting will establish unity within the team | This solution will take more time out of the already behind schedule to address management and not much needed content. |
| #1 | Overall Project management | This will make Jack’s future projects smoother if the same steps, systems and guidelines are applied to make project management more flawless. | This approach may create uneasiness and stress for other stakeholders during the duration of this project. |
| #1 | Scope of project has changed | This will still ensure that the client, trainers and customers are still getting the completed curriculum in its entirety. | Quality of the project is at risk when trying to finish the project on a rushed timeframe. |
| #2 Release software with missing functions to be developed later.  (Development) | Critical functionality pieces are not working in Beta testing | This will not put the programmers in a rushed and stressful position. They can approach it calmly. | This may appear to the client in a negative light. Might look unprofessional and unorganized to the client. |
| #2 | Non-Negotiable Funds and Timeline | This will ensure the rest of the project can be completed on time. | This will create more work for the other stakeholder, other than the programmers, to adapt their portion of the project to reflect these changes. |
| #2 | Overall Project management | This path will not require Jack to spend time reorganizing the GANTT chart which will save him time. | This could create even more miscommunication with the classroom training and web based trainings presenting something other than what will be released. |

Final Recommendation

My final recommendation is for Jack to approach project management differently. He needs to bring all stakeholders together and seriously discuss the current situation they are facing. After this evaluation, the team needs to create a new GANTT chart to ensure that all parts of the curriculum are released on time and are fully functional. To begin this second approach, everyone should be in the same room, including Elizabeth, so there are no room for errors and they can agree on new timelines for their GANTT chart. There may need to be additional meetings especially with Lewis’ team to monitor changes. In this respect, Jack needs to work a bit harder in his project manager role. He may even need to ask Katherine, CRM Product Manager, to help monitor as well. Even though this is Jack’s project, he needs to utilize his team for help if it is necessary. Overall, he needs to better hold his team accountable for their portion of the project. This is where some disconnect happened in the project management the first time.

There are a few cons with this solution. In the Layng (1997) article, it states that “quality is always the prime concern to the project manager and team” (p 17). With this solution, Jack will have the best chance to achieve a high amount of quality in his final product. With solution two there would be holes and more chances for errors and miscommunication. Taking out large portions of the software would also be a huge detriment to the quality of the final product. The first solution will keep the project’s integrity intact as much as possible.  However, due to a lack of time, the quality may suffer more than originally planned, but not to the extreme that the project would have endured in solution two. As stated earlier, Jack needs to hold face-face meetings with his team. This solution will cause some stress on teams such as the programmers to correct the functionality errors, however, I believe in the end the programmers need to be reminded of the bigger picture and what is best for this project and their company. Additional face-to-face meetings will also take more time away from the actual project and from the team member’s other projects, however, it is a very necessary step to move forward. Jack needs to make sure that he communicates with his team the importance of the fact that they guaranteed a Customer Relationship Management curriculum by a certain date. They also guaranteed a classroom-based training as well as web-based training for system administrators. They need to move forward as a team and with urgency to make sure they meet these expectations as best they can with time they have left. This might require the team taking on more stress, having difficult conversations and working harder than ever, but they need to focus on the quality of the project and not risk making this project a disaster in front of the rest of their company. I believe, great things can be accomplished with the time left, but Jack must jump in full force and be transparent in his role as project manager to ensure the success of this project.

Jack will experience push back and the schedule will be tight, but there are sacrifices that Jack must accept. I would suggest reminding his team of the bigger picture would be helpful, as well as pointing out that this was a great learning experience. Dwelling on the stress or negativity will not advance the project, nor is it healthy for any team member. Jack needs to not put blame on anyone, but to keep a positive outlook and create an encouraging environment for his team members as best he can.

Resources:

Ertmer, P.A., Quinn, J. A., & Glazewski, K.D. (2012). The ID CaseBook: Case Studies in Instructional Design. Upper Saddle River, NJ: Pearson Education, Inc.

Layng, J. (1997). Parallels between project management and instructional design. Performance Improvement, 36(6), 16-20.