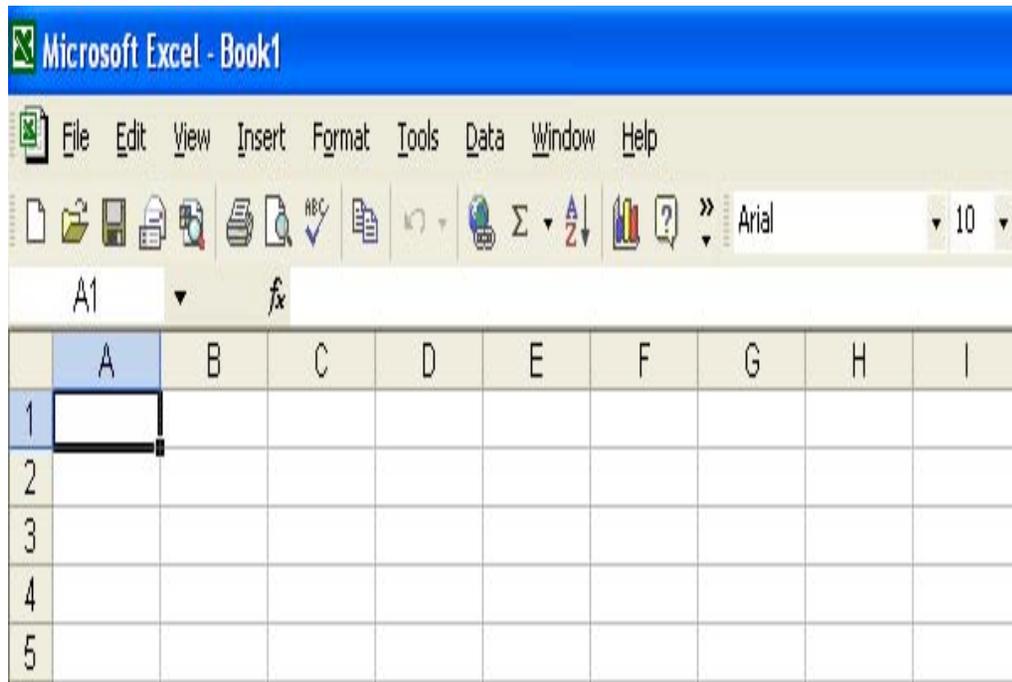


Project Excel



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Summary of IA



- Project Managers are looking for a more efficient & effective way to track simple to complex projects
 - Timelines, milestones, budgets, master project plans
- MS Project is too cumbersome
- Instructional product will allow companies:
 - Opportunity to enhance the skill sets of their current employees
 - Potentially grow revenue
 - Solve issues in a more efficient manner

Sources and Methods



- Two Senior Project Managers
 - Subject Matter Experts
 - One in-person interview, one phone interview
- Manager of a Project Office team
 - Constituent
 - In-person interview
- Learning & Development Consultant
 - Deliverer
 - Phone Interview

Findings



- MS Project is too cumbersome & not easy to use.
 - Not all team leads, managers & key stakeholders know how to use MS Project, making it difficult to share information.
 - A lot of time is spent re-documenting the information into the form of presentations.

Findings



- Benefits of using Excel:
 - Easy access to information
 - Ongoing & flexible organization of material
 - Sharing information with others is simple
 - Easy formulation of project budgets
 - Merging of various team members work into one master project plan is not difficult
 - Ability to track changes to an Excel document, showing project team what has been accomplished and what is still outstanding

Findings



■ Calendar

- Easy access to information
- Ongoing & flexible organization of material
 - Sharing information with others is simple
- Easy formulation of project budgets
- Merging of various team members work/revisions into one master project plan is not difficult

Description of Audience



- For this product we will focus on the following audience at ABC Company:
 - Highly motivated, results oriented
 - Pay/Bonus, recognition, career advancement
 - High literacy
 - 85% hold college degrees
 - Computer literate
 - Mid-level income
 - Average age: 27

Description of Environment



- For this product we will focus on the following audience work environment:
 - ABC Company footprint is in 23 states
 - Over 3,000 project managers
 - Learning delivered via a Learning Management System (LMS)
 - All training delivered in one centralized location
 - Training accessed via an Intranet site
 - Learner transcript available to managers for follow-up & coaching

Learner/User Goals



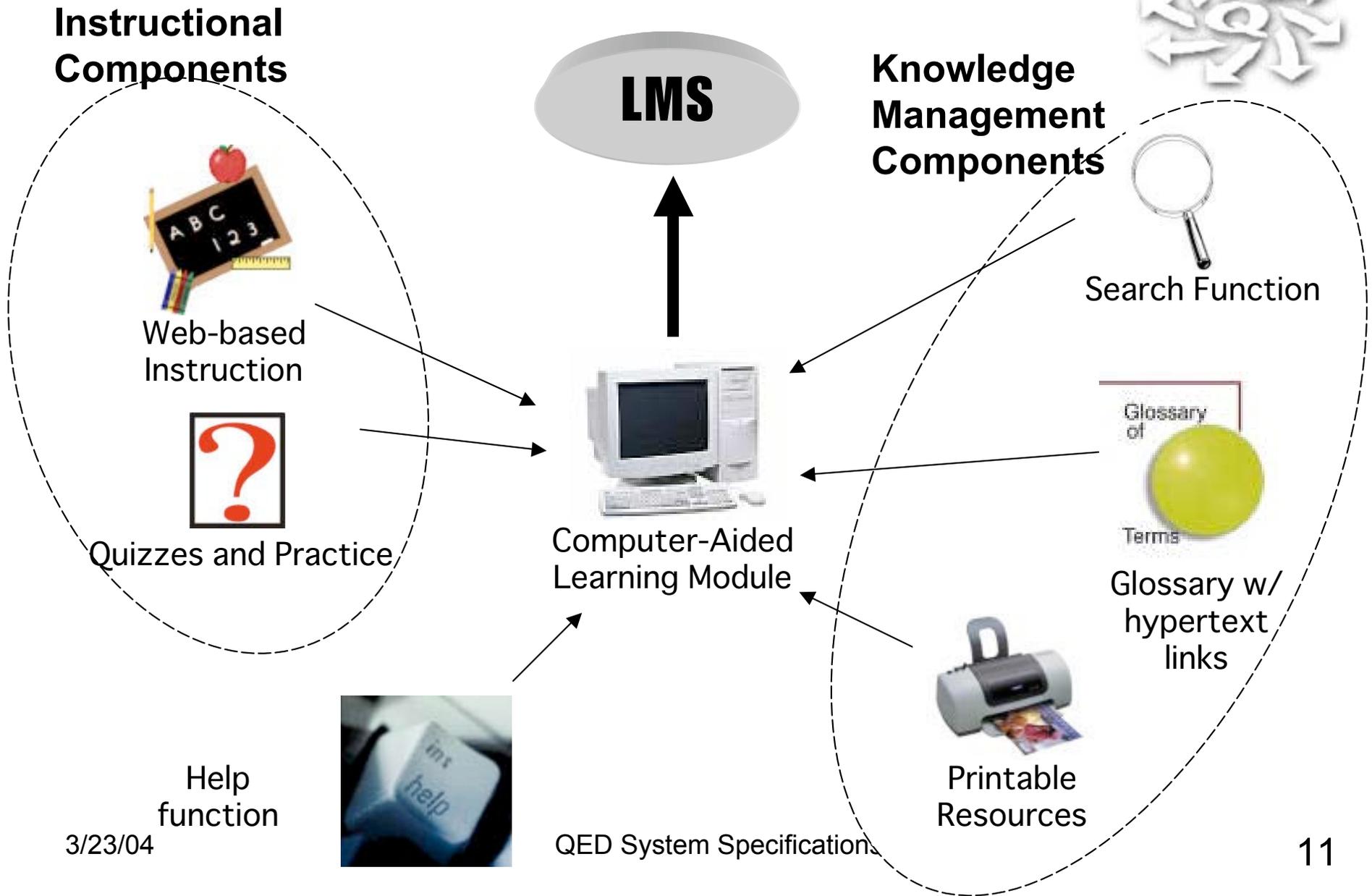
- I want to be able to easily track the progress of my projects.
- I want to be able to create project timelines, showing milestones and due dates.
- I want to understand how to create a master project plan, rolling-up information from different teams into one Excel file.

Instructional Goals



- Learners will be able to plan and manage projects using Excel.
- Learners will be able to create project calendars and budgets.
- Learners will have an understanding of master project plans and their functionality.

Learning System/Environment



3/23/04

Learning System Characteristics



■ Instructional Components

- Web-based Instruction
 - Text, audio, and visual
- Quizzes and Practice
 - Tracked results linked to LMS
 - Simulated situations that imitate desired workplace performance

■ Knowledge Management Components

- Hypertext links to online-glossary
- Search function to major thematic areas
- Printable resource Library
 - Note: While the system environment is web-based, the printable resource Library allows learners to conduct some of their learning off-line.

Rationale for Learning System



- Compatibility with existing learning architecture
 - The ABC Company learning culture is largely web-based
 - All ABC Company courses must link to the LMS
- Simplicity of CBT Modules
 - Easily accessible by all employees
 - Easy to update & maintain
 - Ensure consistent instructional messages & instructional quality

Rationale for Learning System



■ Appropriateness to Adult Learners

- Computer programs are best taught in desktop environments
- High emphasis on learning by doing and practice

■ Off-line Compatibility

- Documents in the resource library can be printed for off-line use

Learners – Constraints



- Spending time on training instead of tasks that pertain to immediate needs within the workplace.
- Indifference to learn how to use Excel to create project plans when they could learn how to use MS Project and make themselves more “attractive” to other companies because it is seen as the “Cadillac” of project plan development.

Learners – Constraints



- Background knowledge of Excel could interfere with the pacing of the course
- Learners can only log on at work to access courses
- Although the average age is 27 and 85% of learners hold college, problems may still arise due to lack of computer proficiency

Learners – Enablers



- High literacy rate and ability to learn based on a high percentage of college graduates (85% hold a degree)
- Young average age and college degree translates into computer literacy
- Motivated to use their time more wisely so that they can move ahead in the company, receive bonuses, and have time for fun outside of work

Delivery System – Constraints



- **General Web Development**
 - Could be expensive to develop depending on how elaborate the lesson
 - Requires user to have internet access
- **Intranet Implementation for Specific Client**
 - Requires access to corporate Intranet
 - Cannot use at home or while traveling
- **Future Internet Development for Broader Audience**
 - Requires password/security in order to charge for training product
 - May require cost for web space or vendor hosting

Delivery System – Enablers



- **General Web Development**
 - Can incorporate interactivity and feedback
 - Can easily include sample files, templates & support documents

- **Intranet Implementation for Specific Client**
 - Available throughout the organization
 - Compatible with existing training infrastructure & tracking capabilities
 - Easy to include company/department specific job aids & samples

- **Future Internet Development for Broader Audience**
 - Available anywhere any time

Objective One



■ Jonathan Leavitt

- Given an already populated project plan, learners will demonstrate their understanding of the Track Changes Tool by tracking the following updates to the project plan: current date, their name, and changing all open tasks to complete.

Objective Two



■ Susan Connell

- Given a project task list & utilizing the guidelines in the instructional product, the learner will be able to create a project calendar with due dates & milestones.

Objective Three



■ Beth Preston

- Given 2 sub-project task lists & utilizing the guidelines for developing a master project plan, the learner will be able to construct one master project plan out of the two sub-project task lists.

Objective Four



■ Mike Culligan

- Given a project scenario and a lump sum of money, the learner will be able to create a budget to accomplish the necessary tasks.



Thank You!
Questions?