

PROJECT MANAGEMENT

for

TRAINERS

Second Edition

LOU RUSSELL

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Preface

Developing, implementing, and managing performance-changing projects requires sophisticated project management skills to ensure completion on time and within budget. Yet, many learning developers either do not have those skills or apply their own project approach inconsistently.

This book describes a project management approach and development process that I created in 2000 to provide a flexible structure to manage projects in my company. This approach was born out of necessity and, in truth, developed in the school of hard knocks as I built a successful consulting business in which a repeatable approach to developing valuable programs was essential to success.

The need for a solid project management approach to training development became evident as the projects of our growing company got larger and more complex. Often we were serving multiple clients with conflicting needs, changing business requirements, and a host of other uncertainties. These more complex projects required multiple developers to work together in a team.

Now, in 2015, multitasking is the norm, and dedicated project teams have disappeared. Instead of focusing on one project at a time with a full-time team, people are juggling multiple projects that require help from many others. This can cause problems as personalities clash and more and more hours are required for rework driven by communication difficulties. As a result, work is not always delivered consistently, and clients begin to notice these struggles. It is time for some structure—not so much structure that flexibility is lost, but enough structure to improve the effectiveness of your business.

You may very well have your own structure, and it doesn't really matter whose you use, as long as it works. The approach in this book is consistent with the Project Management Institute, which builds and maintains best practices of project management. What matters is that the project is planned, organized, and managed in a way that allows the needs of the customers to be met, regardless of how often they change their mind or how many people are involved. Realistic project management forces us

to squarely keep our eyes on the customer's performance need rather than our snazzy methodology and delivery method—online, live, or both.

When creating courses, you may very well be able to “wing it,” especially if you know the material well, are going to teach it yourself, and the customer base is well defined. Unfortunately, this is not the way the business world is right now. Often, trainers are being asked to write courses that will be taught by others or taught completely through technology. We are being asked to develop course materials about things we know almost nothing about—and deliver them in a week. We have to negotiate the requirement differences between squabbling functional silos within the companies we are serving, while negotiating the natural conflict and competition of our own development teams. These are all project management problems.

Tighten your project management process before it is too late. Change the way you think about course development projects. Fight the urge to skip ahead to a solution or visualize the exercises and content while your customers are describing their needs. Forget about the slides you already have. The steps in this book will help you completely define a development project before you start planning the details.

Expect each project to progress completely differently from your plan, and then forgive yourself when it does. A project done correctly is a project whose plan has adapted to the changing needs of the customer. If nothing surprises you, you probably did not add much value for the customer.

Much has happened since the first edition of *Project Management for Trainers*. My business partner Vija Dixon, who was instrumental in the original book, passed away more than five years ago. A devastating recession forced me to completely reboot the business from the ground up, with the ground being just me. Today, many of the facilitators who used to teach for us are back, and new friends and partners have inspired improvements to my project management process. The Association for Talent Development has become a significant business partner, and we are thankful to ATD for allowing us to teach project management and related topics live and online to its members. Special thanks to Senior Director of Education Courtney Kriebs, a close friend and trusted adviser in her role as an ATD leader.

Brittney Helt, my first hire after the recession started to abate, continues to be the most important person in my company. She keeps me focused on work that adds the most value and on finishing projects like this book. Betsy Ballentine joined us to run the operations side a little more than a year ago and will be leaving soon to begin pursuing a career in nursing. She will be sadly missed, but Brittney and I are proud

that she is chasing her dream. Nadine Martin, one of our facilitators who teaches this material, has her fingerprints all over the changes in this edition, as well as the material that stayed the same.

Richard Sites of Allen Interactions and Angel Green of Coca-Cola Beverages Florida provoke me with their interactive approach to development and their unceasing focus on performance change. You'll find pieces by them in chapter 3. Thanks also to my new friend, Megan Torrance, who is the first and maybe only person I've met who is successfully applying an Agile methodology to learning development. She also contributes her approach in chapter 3.

I am a member of a peer-to-peer business group that we call Rogue 9025, which is led by Mike Donahue, a gifted coach and facilitator. He and the other members have built my business with me. Their frank and encouraging feedback is invaluable.

Finally, thanks to my three not-so-little-anymore project managers—my daughters, Kelly, Kristin, and Katherine. Kelly is working for a national company that uses games to teach product knowledge, and while she doesn't think she's in my field, it's fun to share ideas. Kristin and Katherine, both in their second year at DePauw University, juggle academics, athletics, sorority life, and philanthropy projects with amazing ease. I am proud to be their mom.

And to my husband, Doug, I owe the greatest thanks, of course. As a team, we have created a flexible structure to manage the complex balance of our lives. His devotion as both a husband and a father is most important to me and gives me the confidence to create.

The heavy lifting on this rewrite was done by ATD editors Jack Harlow and Melissa Jones, as well as Ellie Sheffield, our amazing 2015 intern from DePauw University. Thanks of course to Mark Morrow, retired editor at ATD, who initially talked me into doing this book.

In 2000 when I wrote the first edition, we built “training programs” and we were “trainers.” Even then, I chafed at the bossy sound of the term *trainer*, preferring instead *learning facilitator*. We created and then taught courses. We learned how to create learning objectives.

Fifteen years later, many forces, including technology, have made the options at our disposal much more complex. Our role demands us to form partnerships with our learners, not just tell them what to do. Most of us have refocused, favoring to talk with our customers about performance-changing experiences rather than training programs. Our industry still lacks a standard language for all the different roles and deliverables, but in this book, I use the terms set out in the following table.

Old Term	New Term for This Book
ASTD	ATD
Trainer	Learning facilitator
Train	Facilitate
Learning objectives	Performance goals
Course	Learning experience
E-learning	Blended learning (whatever it takes)

It's time to begin your project! If you have any questions, feel free to email me at info@russellmartin.com. Seriously—we love this stuff. Remember, bad news early is good news!

Introduction

Whether it is developing a new learning experience, adapting an existing learning experience, finding the right self-paced solution, rolling out the best software to drive performance, or hiring the right vendor to work with, you are constantly working on projects. Years ago, project managers tended to work on one or two at a time. But in today's multitasking workspace, this is no longer possible. Projects today are really like flash mobs—people come together through virtual communication to do something with clear outcomes and then disperse. Isn't this what happens as you attend one-hour meetings on project after project all day long?

In the second edition of *Project Management for Trainers*, you will learn how to manage the projects that you are not dedicated to and neither is anyone else. Think about how you would manage a flash mob: through lean and fast project management to balance your workload and multitasking.

You will also learn practical techniques for rolling out performance improvement solutions through learning and development that solve a business problem. It's exciting, creative, and sacred—because you are managing people's work. Your first question could be, "What will your staff be able to do after this experience that they can't do now?" This question gets to the heart of most business problems, which are caused by a missing skill (something people can't do), a missing piece of knowledge (something people don't know), or an inappropriate attitude (something people believe mistakenly).

Depending on what's best for your learners and their situation, your solution can be delivered to the learners through instructor-led training, e-learning, video-based programs, webinars, conference calls, articles, coaching, or even job aids—all of which are referred to in this book as learning experiences. Your solution is likely only part of the answer to this business problem, and it is important that your business clients understand the role they play as your partner. New performance initiated in a learning experience must be reinforced by supervisors, job descriptions, and performance reviews for change to occur.

Navigating This Book

Depending on your project experience, you may skip some of the chapters that you already feel comfortable with. But try not to skip chapter 2; you'll find the approach to creating project charters easy, fun, and powerful.

Chapter 1: Beginning the Project. In this chapter, you will learn what a project is and how it differs from a task and a process. You'll also learn the roles of the project manager, project sponsor, and stakeholders, as well as the phases of project management as you begin to “dare to properly manage resources.” The language introduced in this chapter will help you understand the other chapters.

Chapter 2: Defining the Project. In the define phase of the Dare Approach, you will learn how to build an initial project charter. This document captures the project scope, the initial business and project objectives, and the risks and constraints, as well as the communication, governance, and transition plans.

Chapter 3: A Course Development Template. Before you can start to build the project schedule, you have to figure out all the tasks that need to get done, what order they'll be in, and who has the right skills to work on each. You can use development methodologies as cheat sheets to help jumpstart this brainstorming period. These methodologies—known as ADDIE, SAM, and Agile (with a couple of other variations available as well)—were developed by experts and outline the tasks needed to do a project. Your project is unique, so you'll have to make decisions about what (if any) methodology and tasks will work best for you.

Chapter 4: Planning the Project. In the plan phase of the Dare Approach, you will learn how to build a project schedule, which you will create from the methodology choices described in chapter 3. The schedule will be made up of measurable tasks assigned to different people with appropriate due dates. You can drop this into an Excel spreadsheet to use as a dashboard. You will also learn how to create a budget, if needed, using a costing worksheet.

Chapter 5: Managing the Project. In the manage phase of the Dare Approach, you will learn how to implement a project schedule. You'll find out ways to adapt to the constant change, how to track the status of a project, how to influence stakeholders, and what to do if you're falling behind.

Chapter 6: Reviewing the Project. In the review phase of the Dare Approach, you will learn how to end and transition a project well, and how to apply a standard evaluation process to capture and share lessons learned.

Chapter 7: Managing Consulting Projects. In this chapter, you will read about how experts in the field are creating new approaches to delivering performance solutions beyond training programs. This will help you apply project management to projects that are not event driven, but may occur over time—for example, coaching, facilitation, and mentoring.

Chapter 8: A Template for Managing External Suppliers. Some or all of your projects may be outsourced to external providers. In this chapter, you will learn about balancing detail and flexibility in the requests for proposal and contracts, managing contractor law, honoring confidentiality, establishing communication, managing change, negotiating effectively, and planning for knowledge transfer and shared risk.

Chapter 9: The Project Begins. This chapter will encourage you to make a personal commitment to improving your project management abilities every time you get a new project.

How to Utilize This Book

The first step to successfully applying this book and improving your ability to grow performance in others is to set some goals for growing your own performance. Pick your top three most important learning objectives from Table I-1. Although it would be wonderful if you had the time to read this book from cover to cover, you are likely crunched for time, so focus on the objectives most pertinent to you and your situation.

Finally, think about a worrisome learning and development project that you are just starting or managing (for example, writing a new learning experience, installing an LMS, or building competency models). Use this project to complete the exercises at the end of each chapter. It will accelerate your learning.

Table I-1. Learning Objectives and Corresponding Chapters

Learning Objective	Chapters
Apply the development methodology (ADDIE, SAM, Agile) that is most appropriate for your project.	3
Avoid difficult project meetings by always assigning a task on the schedule to a person to begin resolution whenever issues are discovered.	4, 5
Build a project charter to document business objectives, project objectives, scope, risks, and constraints.	3
Build a stakeholder communication plan that includes status reporting and organizational change messaging.	2, 4, 5

Table I-1. Learning Objectives and Corresponding Chapters (continued)

Learning Objective	Chapters
Choose the appropriate tasks for each project.	3, 4
Create a project schedule using appropriate methodologies, project constraints, and due dates.	3, 4
Define the roles of the project manager, the project sponsor, and other key stakeholders.	1, 2
Differentiate between project management, process work, and tasks.	1
Establish milestones to monitor interim dates and stay on track.	3, 4
Estimate the cost of your projects and track expenses.	4, 5
Influence stakeholders effectively through a focus on communication and collaboration, not on control.	2, 4, 5, 6
Leverage simple tools (for example, spreadsheets and templates) to manage your project.	3, 4, 5
Manage the end of the project through clear governance and transition plans.	2, 4, 5, 6
Monitor the project using an updated project schedule to drive stakeholder engagement and get bad news early.	4, 5
Pay it forward: Never create documentation that you don't know what you'll use it for later.	ALL
Share the results of a post-project review to grow project management competency through lessons learned.	5
Work back from an established project due date.	3, 4, 5
Worry less and avoid rework through lean and fast project management techniques.	ALL

Project Management Best Practices

The Project Management Institute (PMI) is a U.S.-based membership association of professional project managers. PMI's *Project Management Body of Knowledge (PMBOK)* is a detailed encyclopedia of current best practices in project management. PMI also offers multiple project management certification programs based on the *PMBOK* and the role you intend to play on projects. The Project Management Professional (PMP) certification is the most well-known. There are local chapters in every major U.S. city, and many globally, so if you are interested in learning more, check out your local chapter for programs and study groups.

Outside the United States, project managers may look to PRINCE2 (Projects IN Controlled Environments, version 2), initially developed by the Central Computer and Telecommunications Agency as a U.K. government standard for IT project management and currently managed by AXELOS for certification.

Whether or not you become certified in project management, the process, tools, and techniques you will learn in this book will improve your ability to manage projects and will not conflict with any *PMBOK* guidelines. Where there is terminology confusion in the industry, it will be noted in a sidebar.

Many learners ask if it's worth it to get the PMP certification, which can be a difficult, time-consuming, and expensive process. My advice: Do what aligns to your career plan. If you're new to your job, this certification could help you build credibility and differentiate yourself from your co-workers, although it all depends on your employer. Your employer may even pay for the certification, which is a great benefit. If you're approaching the end of your career, it's probably not worth the effort. In some instances, people who become PMPs get niched into project management roles, making it difficult to move up.

1

Beginning the Project

Q: Why improve project management in learning and talent development?

A: Most of your work is project related. You can decrease the rework with increased focus.

In this chapter, you will learn how to:

- Differentiate among tasks, projects, and processes.
- Define the roles of the project manager, project sponsor, and other key stakeholders in a learning and talent development project.
- Contrast the purpose and deliverables of the four phases of the Dare Approach.

In their work and book *Innovative Performance Support: Strategies and Practices for Learning in the Workflow* (2011), Conrad Gottfredson and Bob Mosher make the case that only 10 to 15 percent of learning (driving a change in performance) happens in a classroom. Performance improvement cannot be achieved with a workshop alone, regardless of how wonderful it is. To ensure that the knowledge is acquired, the learning is applied, and the attitudes are adjusted on the job requires designing components that continue after the formal learning experiences. Gottfredson and Mosher's model shows the importance of reinforcing the application of new learning to drive performance. This may take the form of a formal mentoring process, a facilitated

problem-solving session, a virtual community, or software or study groups. In all these cases, project management will be required to define, plan, manage, and review the solution to create performance that drives business improvement.

What Is a Project?

The best place to start is to clearly define what you mean by *project*. It may seem obvious, but it often isn't. A project has a distinct beginning and end. Someone asks you to do them a favor and create a few PowerPoint slides and the next thing you know, you're creating a half-day workshop on customer service—that's a project.

To properly manage a project—and balance all your other responsibilities—you need to know when a project ends. In our work, the end can be confusing. Using the half-day workshop on customer service example, is the end of the project when the workshop is built or when it is held? A workshop requires scheduling, tracking, and troubleshooting, as well as updating as it ages. That's

Tasks and projects both have a beginning and an end. Projects are a collection of tasks. If something is going to take you more than an uninterrupted half day, it's not a task, it's a project.

a really long time for a project to last! Ongoing, repeating tasks without a specific end point like workshop management—or payroll—are called processes. You and your customer must decide where the end of a project is early in the process. Table 1-1 illustrates the differences between a project and a process.

Table 1-1. Projects Versus Processes

Project	Process
Creation of a one-day workshop	Supervising an employee
Implementation of learning management software (LMS)	Ongoing administration of the LMS
Creation of a compensation plan	Performance review
An organizational needs analysis	Managing to a learning strategy

What Is Project Management?

Simply put, project management consists of *planning*, *organizing*, and *managing work*.

- Planning—anticipating and trying to predict how to set up your tasks for the implementation of a project. This part is a lot of guessing because it's about what will happen in the future and we're (usually) not psychic. Adding to the difficulty is the fact that the project will never go as planned. Ever.

- Organizing—coordinating all the moving tasks, people, dates, budgets, and quality needs once the project begins in order to reach its final goals. This happens every day, in the present.
- Managing—adapting and being resilient to surprises and disasters that have occurred in the past and keeping them on track. As the project progresses, things change, mistakes occur, people don't show up, and disaster always strikes.

In a sense, project management means living in three different states of time—the future, the present, and the past. Keeping an eye on all three for the duration of the project, while difficult, is critical to success. Much like juggling, it requires conscious adaptation and realignment of resources. Later in this chapter you will learn about four basic phases of project management that will help you accomplish these three responsibilities.

Important Project Management Roles

The project manager owns the planning, organizing, and managing responsibilities. As the caretaker, the project manager plans for the needs of a project, organizes current priorities, and manages surprises as the project progresses. The role of project manager requires one foot in the future (creating a plan), one foot in the past (learning from mistakes), and the rest of the body in the present (reacting to surprises).

Many learning and development professionals simultaneously assume the role of project manager and other roles, including developer, graphic designer, and LMS loader. If this is true for you, be careful to budget time on your calendar to think about your project (you'll read more about this when you learn about mitigating risk in chapter 3). Project development, which is more easily measured, may tempt you away from project management time. But failing to block off this time can end up wrecking the entire project.

However, project managers need to remember that they do not own the project and thus cannot control it, which are two very upsetting concepts to some people. And project managers who think they own and can control the project are stubborn, non-collaborative, and secretive. Open communication among all the players drives project success, not anarchy.

Instead, the project is owned by the business that employs the project manager, and it is led by a project sponsor. All projects need a project sponsor, who acts as the business champion of a project, sees the return on investment (ROI), and knows when

to cancel the project if the ROI becomes unlikely as the project progresses. The project sponsor ensures that the project aligns to the business goals and that it is delivered on time.

One project manager is much better than many. Co-project managers usually add unneeded complexity to a project. One project sponsor is also much better than many—multiple project sponsors (or worse, a board of directors) can paralyze a project. If that's a constraint on your project, get help with the politics and try to cultivate a "secret" sponsor from the group.

Beyond the project manager and project sponsor are the stakeholders who you will need to complete the project successfully. These stakeholders could include developers, business analysts, or the finance, legal, or IT departments. When creating the project charter (see chapter 2), you'll figure out which roles you'll need. And when building the project schedule, you'll figure out which people will play those roles. Many will be surprised to hear that you need their help, just like you are when someone drops something on your to-do list. The project manager constantly manages communications with the stakeholders to ensure that they know what and when their deliverables are needed.

Should learners be stakeholders for your project? It seems obvious that they should be, but often they are not. Stakeholders receive something from the project and provide something to your project. If you are working with subject matter experts to build your workshop, you may not work directly with the learners. Revisit the end of your project: Is the delivery of the learning project in your scope, or part of the implementation process? If your pilots are part of your project scope, will the participants be actual learners or experts?

You may be thinking that the differences in tasks, projects, processes, and project roles are not always clear-cut—and you're right. The lines get pretty blurry. To be an effective project manager, you must be able to plan, organize, and control, as well as be clear which activities the people playing stakeholder roles will own. It's easy to get confused between *doing* the project (development) and *managing* the project (project management), which is especially true when you play both roles. For that reason, this book focuses on both: project management techniques and development activities.

Chapter 3 goes into more detail about several methodology options, including SAM and Agile, which were not practiced in learning and development when the first edition was written.

The Dare Project Management Approach

The second edition of *Project Management for Trainers*, is structured around an approach called the Dare Approach (Figure 1-1). Using the mnemonic “Dare to Properly Manage Resources,” this book will introduce you to the four basic phases of project management: define, plan, manage, and review.

Figure 1-1. Illustration of the Dare Approach



Define

The define phase answers the question: *Why are we spending money on this project instead of something else?* Think of this phase as establishing the business purpose, or even better, the business case. The project sponsor plays a critical role in this phase by helping you understand how to set up what you need to do the project correctly. The deliverable created during the define phase is called the *project charter*. This document will serve as your baseline over the course of the project, while being updated and changed as you learn more about it.

Plan

The plan phase answers the question: *How are we going to do this project?* Given that you now understand the reason the project is critical to the business, what's the best strategy for getting it done? Which people should be involved, how much time do you have, and what exactly should be delivered? The project manager plays a critical role in this phase, working out all the logistics until there is a comprehensive list of tasks, which are assigned to specific people, with due dates. It's like solving a big puzzle, and never easy. The project charter holds the high-level answers that help you figure out the best approach. The deliverable created during the plan phase is called the project schedule. Keep in mind that as the project progresses, things will change and so will your project schedule.

The Project Management Institute's *Project Management Body of Knowledge* uses the phrase *project plan* to refer to the project charter and the project schedule. However, many people use these terms interchangeably, so pick what works with your organization. This book uses *project schedule* throughout.

Manage

The manage phase answers the question: *How can I adapt to the surprises and glitches that happen to my project?* With your project schedule outlined, you're now ready to implement it. This is an exciting time to start building whatever it is your business needs. Be aware that everything may change at a moment's notice, and that's to be expected. Resiliency and flexibility will be your most valuable traits as you manage all the changes and update the project charter and schedule to keep everyone on task. Remember, you can't control a project; instead, adapt! The deliverable of the manage phase is a finished or cancelled project.

Review

The review phase answers the question: *What can we learn from this project that will help us with the next?* As a professional in the field of learning and performance, you know that learning actually occurs while debriefing an experience, not during. The deliverable of the review phase is a transitioned project with a project review.

Summary

“The will to win is not nearly as important as the will to prepare to win.” This quote, attributed to former Indiana University basketball coach Bobby Knight, reflects my belief that effective project management results from the combination of a flexible but repeatable process and a growing passion for improving the quality of what you deliver in every project. If you’re willing to invest the time and practice, this book will show you how to deliver effective project management.

[**Buy This Book**](#)