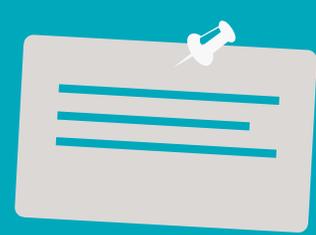
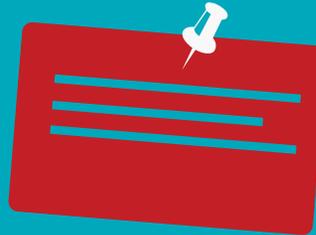
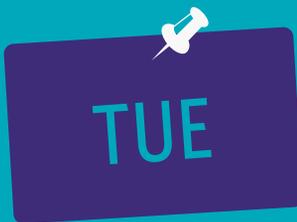
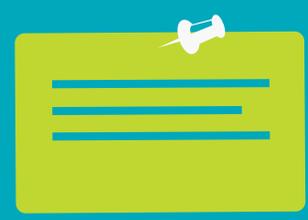
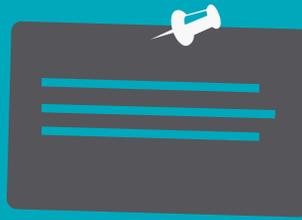
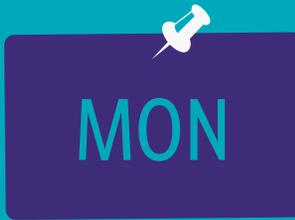


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AGILE AND LLAMA FOR ISD PROJECT MANAGEMENT

Megan Torrance

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LEARNING AND DEVELOPMENT

AGILE AND LLAMA FOR ISD PROJECT MANAGEMENT



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WHY AGILE?	1
IDENTIFY A BUSINESS GOAL	1
START WITH THE LEARNER IN MIND	2
DEFINE SCOPE WITH LEARNER STORIES	6
CHUNKING THE WORK EFFORT	8
PLAN THE WORK AND WORK THE PLAN	10
ITERATIVE DEVELOPMENT	12
CONCLUSION	14
REFERENCES & RESOURCES	15

JOB AID

Primary Learner Persona (PLP) Questions	16
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Agile means more than just being flexible. In instructional design, Agile is a disciplined flexibility, geared toward delivering the most essential product, responding to the most important changes, and constantly fine-tuning the needs and deliverables as a project develops. Based on an information technology industry model first documented in 2001 and popularized by books such as Eric Ries's *Lean Startup* and Michael Allen's *Leaving ADDIE for SAM*, Agile is used to respond to rapidly changing business requirements that shift even before the project is complete, and to address the plague of time and money spent on projects that fail to deliver a return on investment (ROI).

In this *TD at Work*, you will learn how to:

- Identify business goals.
- Use the traditional Agile approach to define the scope of a project.
- Leverage the LLAMA approach to define the scope of a project.
- Break your work down into easy to manage tasks.
- Use iterative development to refine a project's deliverables.

WHY AGILE?

Agile helps manage the time and budget invested in a project. It also helps project managers better target the deliverables required to meet the project's goals. This *TD at Work* will show you how to manage instructional systems design (ISD) and development projects using Agile project management, with an emphasis on the Lot Like Agile Methods Approach (LLAMA), which is designed specifically for instructional projects.

Why should we use a project management method derived from the information technology (IT) industry? To a certain extent the process of developing software and the process of developing training are parallel. They face many of the same types of project stakeholders: sponsors, subject matter experts (SMEs), developers, users, and learners. They also face many of the same types of problems: SMEs who

aren't dedicated, ever-changing business needs, and lack of clearly defined requirements. LLAMA makes some key adjustments to the mainstream Agile approach to account for the fact that training development is different from IT in some small—but important—aspects, notably:

- The syntax and structure of learning objectives differ from that of user requirements.
- Instructional designers are more likely to work on multiple projects than software engineers.

Agile and LLAMA work with any learning medium, whether you're designing classroom instruction, virtual training, e-learning, m-learning, or learning platforms. Agile works best for projects with clear (even if they're moving) start and end dates and deliverables. However, Agile does not work well with support functions, such as LMS help desk support, or the ongoing delivery of classroom curricula.

IDENTIFY A BUSINESS GOAL

Most project management methodologies and instructional design approaches suggest that you understand the business goal for the project before you get started. The Agile project management method, and the LLAMA method in particular, is no different in this respect. Much has been written on the need to tie a project into business goals (such as *Making the Financial Case for Performance Improvement* by Clare Novak and *Strategic Learning Alignment* by Rita Mehegan Smith), so in this *TD at Work* I'll share just a few tips to get you started.

When connecting your training with business goals that are, in turn, tied to business strategies, think big. Connecting the project's goals to a greater vision for the organization helps the project sponsors, SMEs, and the project team stay motivated when project crises arise. This project management technique also helps with instructional design because you'll be able to make this connection for the learners in your course.

WHAT DO WE REALLY MEAN BY AGILE?

At least four different uses of the word agile are active in the training world. While there is some overlap, knowing which agile you're using is important.

Content Agility is the capability to deliver learning material in a variety of formats. Think of this as a “write once, publish many” approach with the same content and structure being delivered through multiple platforms. Most content management systems and higher order content authoring systems allow for content agility.

Learning Agility is a person's ability to handle new problems and challenges based on prior learning and experience. It's essential for effective leadership and innovation, and can be fostered by an organization's culture around learning and growth.

AGILE Instructional Design is a design approach to a learning project with five stages: align, get set, iterate and implement, leverage, and evaluate. AGILE is designed to support learning teams as they rapidly deploy both formal learning and complementary performance-support mechanisms for informal learning.

Agile Project Management is a method for managing a creative project process, one in which team members experiment and observe to improve a product as it is developed. Agile project management works well when the design and development involves creative and complex decisions, when the specifications may not be well defined, and when business needs shift. To handle all this change, the Agile project management approach builds deliverables in small increments, releases usable products frequently, and uses those releases to gather feedback. LLAMA—the Lot Like Agile Management Approach—is a modification of the traditional Agile techniques to support instructional design and development projects.

This *TD at Work* focuses on Agile project management and LLAMA, although any of the other types of agile can be incorporated into the designs of a project managed this way.

Most business strategies fall into one of four broad categories:

- increasing revenue or income
- decreasing costs (including the costs of legal or ethical non-compliance)
- improving product or service quality (including the ability of customers to engage with the product or service)
- expanding the capacity of the organization and its people.

You should define the business goal in as much detail as is useful for the project effort. Be sure that vague terms such as “improve” and “reduce” have shared meaning across all the stakeholders. Some organizations use SMART (specific, measurable, attainable, realistic, and timely) goals or other criteria to define outcomes. In other environments, stakeholders will bristle at the thought of putting too fine a point on things. Following the organization's lead on this will further help to align the project with the organization's cultural context.

START WITH THE LEARNER IN MIND

When kicking off a project using an Agile methodology such as LLAMA, start by defining a primary learner persona (PLP). Instructional design projects typically start with an audience analysis, which provides a detailed look at the range of learners, their skills, and their needs for your project.

Defining the PLP

The PLP is something quite different from the audience analysis. When you define a PLP, you focus your view on a single, usually fictitious, learner for the project. The primary learner is often an iconic member of the broader audience, and is recognizable to stakeholders as a realistic portrayal of a typical individual. Although it is possible to identify the PLP with an actual person, you should avoid doing so. The PLP is defined in much greater detail than most audience analyses

in terms of personal characteristics, motivations, family, recreational activities, professional goals, and level of comfort with technology (particularly with e-learning projects). It is given a name and often a photo. A sample PLP description can be found in the Example of a Primary Learner Persona sidebar.

THE PRIMARY LEARNER IS OFTEN AN ICONIC MEMBER OF THE BROADER AUDIENCE, AND IS RECOGNIZABLE TO STAKEHOLDERS AS A REALISTIC PORTRAYAL OF A TYPICAL INDIVIDUAL.

Why create a persona with this much detail? By identifying the PLP as a realistic person, the project team and project sponsors have an easier time relating the PLP to an actual learner. In the throes of day-to-day project activities, it is easy to get lost in the details of screen layout, instructional notes, job aids, LMS compatibility, and the hundreds of other things instructional designers need to worry about. It is helpful to think of the PLP as a member of the project team, guiding instructional designers through a variety of decisions and offering both SMEs and stakeholders a clear rationale for those decisions.

You may create multiple personas during a project, but you should define and select one to be the primary persona. This helps keep the project from being all things to all people, which often really means all sorts of things for no one in particular. Defining a single PLP does not mean you are excluding other types of learners from using the same course and content. Instead, when the tough decisions need to be made about your project, your team can use the PLP's traits as a guide on how to proceed.

Defining the PLP is one of the earliest activities in a project kickoff session. Both SMEs and stakeholders should be included in the process. Instructional designers may guide the session with questions, but the business client should drive the responses. For this exercise, you'll want to have four to six flipcharts, whiteboard sections, or worksheet columns—one for each

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EXAMPLE OF A PRIMARY LEARNER PERSONA

Name: Geoffrey

Age: 42

Geoff has spent the last five years of his career as a project manager in the IT department and has great aspirations to someday become the director of IT. Prior to working at his current company, he held IT positions at several small to mid-size companies throughout the Northeast. While he feels comfortable in his current role and enjoys being a leader to his six direct reports, he knows that to move forward in his career he will need to stay current on cutting-edge tools and continue learning new skills so that he looks smart and competent, not just overbearing.

Putting in 45 to 50 hours a week plus driving 45 minutes to get to the office each day means that Geoff's wife, Karen, does most of the chauffeuring of their two kids, Alex (10) and Bethany (8), to their various extracurricular activities. On the weekends when he's not at work, Geoff spends most of his time doing work around the house. If he's lucky he'll have time to check in on his Fantasy Football team, but usually he gives up after a few weeks and lets the roster sit through the end of the season, leaving it up to luck if he wins the pool of money that he and his college buddies contributed to.

Geoff likes it when he has the opportunity to complete his required training and development activities via e-learning because it means that he can go at his own pace and fit it into his busy schedule wherever and whenever time allows. Even better is when Geoff can watch and learn using his shiny new tablet, which he almost always has with him.

IT IS HELPFUL TO THINK OF THE PLP AS A MEMBER OF THE PROJECT TEAM, GUIDING INSTRUCTIONAL DESIGNERS THROUGH A VARIETY OF DECISIONS AND OFFERING BOTH SMEs AND STAKEHOLDERS A CLEAR RATIONALE FOR THOSE DECISIONS.