

**IBM Software Executive Briefing Centers:
Gaining Ground in Reporting**

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Executive Summary

The IBM Software Executive Briefing Centers (SW EBCs) are a worldwide IBM program designed as a sales tool for the IBM software sales force. There are currently nine centers located around the world. The relevant operating system includes the IBM SW EBC program as a whole, including upper management, the individual briefing centers, and all of the employees within the individual briefing centers.

The SW EBC program tracks data on all briefings and other activities conducted in the SW EBCs. The purpose of the reporting is to measure the performance of each individual center and of the SW EBC program as a whole. Each briefing center is responsible for reporting its own monthly activity. This monthly performance report is submitted to the SW EBC program manager who serves over all of the software briefing centers.

The current margin of error within the reporting structure each month is 11-12%. The SW EBC Program Manager wants a reduction of errors to an improved margin of error of 2-3% in 2006. There is varied consistency between the briefing centers' reporting methods, leading to errors in the monthly performance reported by each center.

The probable causes for the inconsistencies and reporting errors are the gaps between what is currently happening in the process of data calculation for the monthly performance report compared to how the data should be calculated. Currently, each center determines its own methods for calculating data for the performance report. There is not a documented policy and procedure in place for the data reporters to follow when calculating and collecting data for the performance report. In addition, the data reporters are not trained for this job function.

This proposal has been prepared by a team of instructional designers after performing an intensive front-end analysis which included observation and interviews with key SW EBC staff in order to collect quantitative and qualitative data. Based on our findings, it is our recommendation to institute a training system within the SW EBCs, creating an instructor-led training program for all EBC staff. The solution recommended within this report is a two-tiered process. First there would be revisions made to the automated reports within the MarketBound database system. Once the revisions were made, instructor-led classroom training would be given to all of the SW EBC managers, who would in turn deliver the training to their respective offices.

Within this proposal is a statement of the problem being experienced within the SW EBCs followed by the proposed solution and rationale. Next is a list of all of the products which we anticipate being developed as part of the project, and then a detailed description of the eight different phases needed to carry out the project. At the end of this proposal is an appendix outlining the milestone events and activities, a staffing plan, and a budget. Our intent for the format of this proposal is to serve as a user-friendly blueprint for navigating the various detailed portions of the project.

The Problem

The Software Executive Briefing Center (SW EBC) organization within IBM tracks data on all briefings and other activities conducted in the SW EBCs via a report developed using Lotus 1-2-3, which is the Lotus spreadsheet application. The purpose of the reporting is to measure the performance of each individual center and of the SW EBC program as a whole.

There are nine IBM Software Executive Briefing Centers located throughout the world, each of whom use the same Lotus 1-2-3 spreadsheet for reporting purposes. Currently, each briefing center is responsible for reporting its own monthly activity via an assigned member of each team – the data reporter – who is typically a briefing coordinator or briefing associate. The monthly report is generated first by each center's data reporter and then compiled into one report by the Silicon Valley EBC's data reporter to be submitted to the SW EBC program manager as one cohesive report. There are varied calculations currently being used among the centers for the various fields within the report, causing a margin of error of 11-12%.

The SW EBC monthly report tracks data on all briefings and other activities conducted in the SW EBCs as they relate to the mission of the organization as a whole – to sell more, faster. The report includes the following data for each center:

- Number of briefings
- Number of customers
- Number of accounts
- Potential revenue
- Number of briefing days
- Overall Assessment
- Number of business partner (BP) briefings

- Number of briefings that cancelled
- Number of briefings that postponed
- Number of other activities

The errors that are occurring in the report are widespread. First, the automated reports in the MarketBound database system do not automate the information for every field in the monthly report, meaning some information has to be counted manually which naturally generates human errors. Next, some data reporters are not even aware that the automated reports within MarketBound exist, causing even more human errors from manually counting the data for every field in the report.

Additionally, some of the fields in the monthly report are being manually calculated incorrectly among the briefing centers, specifically:

- **Number of customers:** Briefing attendees in MarketBound are classified as customer attendees, IBM attendees, and other attendees. Some centers count the number of customer attendees only, and some count a combination of customer and IBM attendees, customer and other attendees, or all three classifications of attendees.
- **Number of business partner briefings:** The briefing centers classify business partner briefings differently from each other, and therefore some centers report an inflated number of business partner briefings while others report a deflated number.
- **Overall Assessment:** Each briefing that is conducted in the SW EBCs is evaluated by all of the briefing's attendees. So, each briefing manager receives an evaluation for each briefing he manages, and MarketBound not only lists the individual evaluation for each briefing, but it also automatically calculates the overall average per month for each briefing manager. Unfortunately, MarketBound does not calculate an overall average for each briefing center as a whole on a monthly basis, so the

center's monthly score for the report's purposes has to be manually averaged by the data reporters. The data reporters are calculating this field incorrectly by averaging the briefing managers' monthly totals against each other, which does not give an accurate weight to the evaluation numbers. The data reporters who are calculating this field correctly are actually averaging each individual briefing evaluation number that the center completed during the given month.

- **Number of other activities:** The briefing centers classify other activities (events which can not be defined as a briefing but which utilize the EBCs' time/space/budget) differently from each other, and therefore some centers report an inflated number of other events while others report a deflated number.

The SW EBC program manager wants a reduction of errors in reporting from the current margin of error of 11-12% to an improved margin of error of 2-3% in 2006.

By lowering the current margin of error caused by variations in consistency in reporting from 11-12% among the briefing centers to the desired margin of error of 2-3%, the SW EBC program manager will have good, true, correct, and substantial information when reviewing the productivity and performance of each center, as well as when presenting it to his superiors. The information is important for upper level management so that they can see the value the SW EBCs' briefings to the software business operation of IBM.

Proposed Solution and Rationale

After conducting a comprehensive front-end analysis of the IBM Software Executive Briefing Center program, which included an analysis of the operating system, needs assessment and analysis of solutions, the data revealed that the most effective and least disruptive way to reduce the percentage of errors in the automated reports from 11-12% to 2-3% is to implement a two-tiered process solution. This solution will require 1) revisions of the automated reports within the MarketBound system to be made, and 2) an instructor-led training via classroom instruction to be implemented. All solutions were analyzed with regard to time, environmental considerations, organizational change, space and equipment requirements, cost, benefit and loss to individuals, and benefit and loss to the organization. This solution met all criteria with the least amount of disruption to the organization.

To accomplish the first tier of the project, the SW EBC will utilize the personnel and resources of the in-house IT department to make the necessary changes within the MarketBound system. The IT department is responsible for the creation and development of the MarketBound system.

The instructor-led classroom training will be initiated by the SW EBC program manager. The Austin Site Education department will be utilized as the design, development and delivery systems for the instructor-led training. This site is already in place and has the resources, knowledge and workforce to create the necessary training. Once the request to the Austin Site Education department is made, a team will be formed that will include the program manager, instructional designers, project manager, subject matter expert, writer, trainer, graphic artist, test developer and support personnel. Each will be involved in various activities throughout the project.

The training of the trainers will be conducted for all of the briefing center managers during their next quarterly meeting in Austin, Texas. At the training session, the briefing center managers will learn the new functions within the MarketBound automated reports, as well as the proper procedures for calculating and entering the correct data into the monthly report. The briefing center managers will then take training materials to their respective briefing centers and train not only the data reporter, but also the entire staff since all members of the EBC staff have their hands in the MarketBound request forms at one point or another during the briefing process. This will help ensure accurate data is entered into the forms before the data reporters ever extract the data for the monthly reports.

Training was imperative to the solution for this problem since there is not a standardized process or any training in place on how to complete the monthly report. Once that was established, how the training was to be conducted needed to be determined. One solution considered was to provide instructor-led training via teleconference. With the SW EBCs located throughout the world, the time differences between offices and additional cost for the international conference call made this solution prohibitive. Another solution of appointing one data reporter to the responsibility for all reporting was considered. While this solution would have solved the problem of consistent reporting throughout the SW EBCs, this is a time sensitive report and it would place a tremendous burden and additional responsibility on one data reporter.

While there will be costs associated with the training, the cost of producing the training will be minimal because of the utilization of the in-house training department for development. Likewise, the cost for the briefing center managers to complete the module will be negligible due to the fact that it will take place during the next quarterly meeting on the IBM premises. Likewise, the cost of the MarketBound revisions will be minimal since the in-house IT department will be utilized. Once the training has been implemented throughout the SW EBCs,

there will be one procedure in place on how to collect data to produce the monthly report. By implementing this training and having all data reporters following the same procedure, it is predicted that the goal of reducing errors to the requested 2-3% will be accomplished.

The Products

Instructor Guide

The instructor guide will contain three different sections: front-end materials, instructional content, and instructional materials. A list of what each section will consist of is below:

- **Front-end materials**
 - Table of contents for the instructor guide
 - “How-to” guide for using the instructor guide
 - Outline of the training agenda
 - Detailed description of the material
 - Suggestions for presentation
 - Summary of each topic to be covered
 - Quick reference to the parts of the instructor guide
 - List of equipment needed for each lesson
 - Bibliography of resources used
- **Instructional content**
 - Lesson-by-lesson outline of all instructional content
 - Activities to be completed during training
 - Sample questions to use during discussion
 - Copy of each lesson’s PowerPoint presentation
 - Detailed descriptions of the monthly report, the MarketBound database system, and the MarketBound reports
 - Definitions of items contained in the monthly report, in the MarketBound database system, and the MarketBound reports
 - Copies of any handouts which may be used during the lessons
- **Instructional materials**
 - Copy of the student guide
 - Copy of the monthly report
 - Screen shots of the MarketBound database system and reports
 - Assessments and answer keys
 - Information concerning equipment needed
 - Information about learners’ special needs

Student Guide

The student guide will contain two different sections: front-end materials and instructional materials. A list of what each section will consist of is below:

- **Front-end materials**
 - Table of contents
 - “How-to” guide for the student guide

- Training goals and objectives
- Glossary of items contained in the monthly report, in the MarketBound database system, and the MarketBound reports
- **Instructional materials**
 - Sections containing each lesson based on the training agenda
 - Objectives for each lesson
 - Activities and content to be covered in each lesson
 - Note sheets for each lesson to follow along with the PowerPoint presentations
 - Screen shots of the MarketBound database and reports which are pertinent to each lesson
 - Copy of the monthly report

Instructional Materials

PowerPoint Presentation

The PowerPoint presentation will be developed based on the material in the instructor guide. The slideshow will serve to highlight important training content and will be based on each lesson's objectives.

Job Aide

The job aide will be an 8.5"x11" print-out of a chart outlining the steps one must go through to correctly figure the monthly report. The reporter may use the job aide to help remind them of the steps to use to correctly calculate their EBC's numbers each month.

Awareness Materials

The awareness materials will be emails sent out to all trainees from the program manager. The emails will include training highlights and training dates, times and locations. The emails will also inform trainees that they must bring their IBM ThinkPad to the training room and that lunch and refreshments will be provided to them.

Assessment Packet

The assessments will be developed by a trained test developer on the Austin Site Ed. team. It will include a dummy MarketBound database with MarketBound reports and a dummy monthly report for the trainees to be assessed on figuring a staged set of monthly numbers. The assessment packet will also include the summative assessment test and surveys.

Formative Evaluation Packet

A formative evaluation packet will include the instructor guide and the assessment packet. The formative evaluation packet will facilitate one-on-one testing and small group testing in advance of revision of the materials.

Summative Evaluation Packet

The summative evaluation packet will include consist of all of the instructional materials outlined in the student guide. It will also include a list of all tasks completed since the start of the project, as well as surveys which each trainee will complete at the end of the instruction. The summative evaluation will be conducted by an outside evaluation specialist who will compile the reports to be submitted to the program manager and the planning and development teams.

Project Description

Listed below are the phases that will occur in the design, development and implementation of the instructor-led classroom training. (Appendix 1: Milestone Events and Activities, Appendix 2: Staffing Plan, Appendix 3: Budget)

Phase One: Start and Plan Project

May 8, 2006 – May 12, 2006

Team Members:

1. Instructional Designer 1
2. Instructional Designer 2
3. SW EBC Program Manager
4. Project Manager
5. SW EBC Manager (Subject Matter Expert)
6. Trainer/Instructor
7. Test Developer
8. Reports Lead
9. Writer
10. Graphic Artist
11. Administrative Assistant

Once the SW EBC program manager has initiated the training program a planning meeting will held. He feels that it is important for all members to attend the initial meeting. The SW EBC's administrative assistant will send out an email for all team members. During this initial meeting the goals, objectives, resources, obstacles and time frames will be discussed. From the information gathered in the meeting, the instructional designers will conduct a content analysis, a task analysis, and develop a plan to implement the project with the help and input from the subject matter expert and reports lead. The plan will then be submitted to the SW EBC for approval. Once the plan is approved, the plan

will act as the blueprint to be followed through project completion. The administrative assistant will be responsible for distributing copies to all team members before the content planning meeting.

Phase Two: Plan Content

May 15, 2006 – May 18, 2006

Team Members:

1. Instructional Designer 1
2. Instructional Designer 2
3. SW EBC Program Manager
4. Project Manager
5. SW EBC Manager (Subject Matter Expert)
6. Trainer/Instructor
7. Test Developer
8. Writer
9. Graphic Artist
10. Administrative Assistant

Once the project plan is approved, the project will move on to phase two. In this phase, a meeting to plan the content of the project will be conducted. All team members listed above will attend this meeting with the exception of the SW EBC program manager, who will review and approve the content before moving onto phase three. Prior to the meeting all members will have had time to review the objectives, task analysis and content analysis to prepare for the content meeting.

During this meeting, the objectives, task analysis and content analysis will be reviewed for any changes. The ideas for the content and delivery of the rough draft materials will be discussed and planned. The products, delivery and content for the rough draft materials will be based on the objectives, task analysis

and content analysis developed by the instructional designers along with the input from the reports lead and SW EBC manager (subject matter expert) and resources available.

Once the content and delivery of the rough draft products have been outlined and agreed upon, the administrative assistant will distribute the content plan to the instructional designers, program manager, SW EBC manager, instructor of training, and test developer for changes and approval. Once the above team members approve the plan, it will go to the SW EBC program manager for final approval.

Phase Three: Training Set-Up and Awareness Activities

May 22, 2006 – May 23, 2006

Team Members:

1. Instructional Designer 2
2. SW EBC Program Manager
3. Project Manager
4. Trainer/Instructor
5. Writer
6. Graphic Artist
7. Administrative Assistant

After the plan for the rough draft of the delivery and products for training has been approved, the above team members can start on phase three.

The instructional designer will work with the writer and graphic artist to develop awareness materials that will be distributed to all trainees. Because the SW EBC offices are located worldwide, the awareness materials will be emails sent out to all trainees from the program manager. The emails will include training highlights

and training dates, times and locations. The emails will also inform trainees that they must bring their IBM ThinkPad to the training room and that lunch and refreshments will be provided to them.

Since the training of the trainers will take place during their quarterly meeting on IBM premises and all trainees will bring their ThinkPad, there will be a minimal amount of set-up involved.

Phase Four: Develop First Draft Products

May 22, 2006 – May 29, 2006

Team Members:

1. Instructional Designer 1
2. Instructional Designer 2
3. Project Manager
4. SW EBC Manager (Subject Matter Expert)
5. Trainer/Instructor
6. Test Developer
7. Writer
8. Graphic Artist
9. Administrative Assistant

This phase of development includes all products that were planned and approved from phase two. These products include an instructor's guide, student guide, PowerPoint presentation and job aide. The design team developing these products will consist of the instructional designers, test developer, writer and graphic artist.

The administrative assistant will provide any support needed by the design team members and the project manager will ensure that the plan moving on schedule.

The Instructor and SW EBC manager will be involved in the review process and available for further input if needed.

The instructor guide will be a booklet developed to contain three main sections. The first section will contain the front-end material, which includes the table of contents, a “how-to” guide for using the instructor guide, an outline of the training agenda, which will include a detailed description of the material that is to be presented, and suggestions for the instructor. Also included in the first section will be a summary of each topic, which can be referred to by the instructor as a quick reference, and a list of equipment that will be needed to deliver the instruction. The second section of the instructor guide will contain the instructional content which will include an outline of the content to be presented along with activities that will be completed during the training. A copy of the PowerPoint presentation will be provided in this section as well as copies and detailed descriptions of the MarketBound reports. The last section of the instructor guide will contain a copy of the student guide along with the assessment materials and answer keys.

The student guide will contain two sections. The first section will have a table of contents and a “how-to” guide for the student. Training goals and objectives will be provided along with a glossary of items contained in the monthly report. The second section of the student guide will be laid out lesson by lesson. Within each lesson, objectives will be listed, along with the activities and the content that will be covered in each lesson. Screen shots of the MarketBound database and reports will be provided in this section along with a copy of the monthly report.

A PowerPoint presentation will be developed based on the material that will be presented and objectives for training. The PowerPoint will highlight important training content and screenshots.

The last product to be developed will be a job aide to be used by the data reporter as a reference when completing the monthly report.

Once all products are completed and reviewed, any necessary changes will be made. Once the products each get final approval, they will be produced and packaged.

Phase Five: Conduct Formative Evaluation

May 30, 2006

Team Members:

1. Instructional Designer 1
2. SW EBC Manager (Subject Matter Expert)
3. Reports Lead

Once the first draft products have been developed, a formative evaluation will be conducted in order to provide information for revision of the materials. During the formative evaluation, the design will be reviewed, including the goal, analysis results, task analysis, and assessment strategies. Next, the subject matter expert will review the appropriateness of the data related to the content, the instruction for the learner, the instructional strategies, and the examples, practice exercises and feedback. Finally, the reports lead will provide learner validation by relating the learner's understanding of the content of the instruction, practice exercises and tests, directions and procedures, textual materials, and graphics and visuals. A small group evaluation and field test may also be performed in order to determine the effectiveness of the revisions and to ascertain any problems that may arise.

Phase Six: Revise Materials/Complete Final Drafts

May 31, 2006 – June 2, 2006

Team Members:

1. Instructional Designer 1
2. Instructional Designer 2
3. Graphics Artist
4. Writer
5. Administrative Assistant

Once the formative evaluation has been completed, the materials will be ready for revision. The instructional materials will be revised by the instructional designers, the graphics artist and the writer based on the results of the formative evaluation. After the revisions have been applied, the final drafts will be completed and the administrative assistant will print them.

Phase Seven: Conduct Training the Trainers Workshop / Evaluate Workshop

June 5, 2006 – June 6, 2006

Team Members:

1. Trainer
2. Trainees (SW EBC Managers)

During the training the trainers workshop, the workshop instructor will train the SW EBC managers the content so that they may conduct their own workshops at their respective EBC locations. Once the train the trainers workshop has been completed, the SW EBC managers will have the knowledge to go back to their briefing center and train their employees. The SW EBC managers will train not only their data reporters but also the rest of their staff so that all EBC employees can know the correct information which needs to belong in the MarketBound

request forms in order to have accurate monthly reports. The day after the train the trainer workshop, the SW EBC managers will evaluate their experience in the workshop.

Phase Eight: Conduct Summative Evaluation

July 10, 2006 – July 14, 2006

Team Members:

1. Evaluation Specialist
2. Instructional Designer 1
3. Project Manager
4. Program Manager
5. Writer

During the summative evaluation portion of the project, the instructional designer and the evaluation specialist will evaluate the success of the project in conducting the workshop, changing the post instruction performance of the trainees, and solving the problem within the operating system. The evaluation specialist, project manager and the instructional designer will choose the format for the summative evaluation from one of many different models. After the summative evaluation has been conducted by the evaluation specialist, the specialist, the project manager and the instructional designer will compile the results, and then the writer will write the final report. Finally, the project manager will submit the report to the program manager who will review the results of the entire project.

Appendix

Appendix 1: Milestone Events and Activities -- Please see attachment SWEBC.mpp

Appendix 2: Staffing Plan

Major Event	Activity	Required Personnel/Team Members												
		Instructional Designer 1	Instructional Designer 2	Program Manager	Project Manager	SW EBC Manager /SME	Trainer/Instructor	Test Developer	Reports lead	Writer	Graphic Artist	Administrative Asst.	SW EBC Managers	Evaluation Specialist
Start Project	Plan	x	x	x	x	x	x	x	x	x	x	X		
	Complete	x	x			x	x	x						
	Check	x		x	x	X								
Content Planning	Plan	x	x		x	x	x	x		x	X			
	Complete	x	x		x	x	x	x		x	x	X		
	Check	x	x	x	x	x	x	X						
Develop 1 st draft Products	Plan	x	x		x	x	x	x		x	x			
	Complete	x	x		x		x	x		x	X	x		
	Check	x	x		x	x	x	X						
Training Set-up & Awareness Activities	Plan		x		x		x			x	x	X		
	Complete	X	X				x			x	x	X		
	Check	X	X		X		X							
Conduct Formative Evaluation	Complete		X		X	X	X		X			X	X	
	Check	X	X		X	X	X	X	X					
Revise materials Complete Final draft	Plan	X	X		X	X	X	X						
	Complete		X		X			X		X	X	X		
	Check	X	X		X	X	X	X						
Conduct Workshop	Complete				X	X	X		X				X	
Summative Evaluation/ Report	Plan													X
	Complete	x	x		x					x		x		X
	Check	x		x	x									X

Appendix 3: Budget

<u>Position</u>	<u>Salary/Year</u>	<u>Hours Invested</u>	<u>Total for project</u>
Instructional Designer 1	\$68,000	72.28	\$2362.83
Instructional Designer 2	\$36,000	123.62	\$2138.62
Program Manager	\$120,000	28.73	\$1657.43
Project Manager	\$63,000	4.28	\$129.64
SW EBC Manager/SME	\$80,000	28.28	\$1087.64
Trainer/Instructor	\$47,000	12.28	\$277.53
Test Developer	\$48,000	19.62	\$452.63
Reports lead	\$80,000	23.40	\$899.96
Writer	\$49,000	63.62	\$1498.25
Graphic Artist	\$36,000	43.62	\$754.63
Administrative Asst.	\$28,000	80.28	\$1080.57
SW EBC Managers	\$80,000	8.00	\$307.68
Evaluation Specialist	\$43,000	12.00	\$248.04
<u>Materials</u>	<u>Cost per Unit</u>	<u>Quantity</u>	<u>Total</u>
Workshop Space	\$2.25 per Sq. ft.	250 sq. ft.	\$562.50
Copying: Black & White	.05 cents per copy	2250	\$112.50
Copying: Color	.75 cents per copy	450	\$337.50
Binding	1.30 per book	80	\$104.00
		GRAND TOTAL:	\$14,011.95