

IBM Software Executive Briefing Centers
Multi-Customer Briefings Training

Project Management

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EXECUTIVE SUMMARY

The IBM Software Executive Briefing Center (SW EBC) program is comprised of ten briefing centers worldwide. The primary mission of the SW EBC program is to act as a sales tool for the worldwide IBM software sales force by helping them to sell more, faster, through highly customized events in a customer-ready environment.

With so many briefing centers spread across the world, and with a sales force which spans the globe, the SW EBC program must employ a robust briefing management database system. The briefing management system currently in use is a home grown application entitled MarketBound. The MarketBound database system houses each individual briefing's requirements, documents, and other information; keeps the briefing centers connected to each other from each of the various center locations; and serves as a central point of online contact for the software sales force.

Typically, when a software briefing is requested by a software sales representative via the online MarketBound briefing request form, or Visitor Information Sheet (VIS), it is for one client (or company) which will be attending the briefing. The sales representative enters his client's information into the form, such as the client's address, industry, and web URL; the client's current computing environment; any competitive issues the EBC should be aware of; the briefing attendees; the topics which are to be addressed during the briefing; and the IBM business opportunity. Other times, the sales representative may request a briefing for several clients attending the same event. These briefings are referred to as multi-client briefings.

Currently, the MarketBound system is equipped for only one VIS per briefing. This presents a problem for multi-client briefings, as each client's information (computing environment, competitive issues, etc.) is different. As a remedy to the problem, a new VIS called an MCB (for multi-client briefing) is being developed. The new MCB will allow for as many VIS's as are needed to be placed within it, linking all of them together for the same briefing. The process for requesting an MCB will be significantly different from what the sales force is currently used to. Word of the new MCB offering is being spread through the appropriate chains of command, but training also needs to be offered to educate the sales force in how to effectively utilize the new MCB tool.

After being successfully implemented, IBM software sales representatives will be trained to effectively communicate the clients' issues to the briefing centers via the new MCB form. In turn, the IBM SW EBC program will have a more effective method for capturing information for multi-client briefings, thereby delivering briefings on a much higher scale for those clients.

SCOPE MANAGEMENT

Conceptual Development / Background

Problem Statement

Currently, the MarketBound system is equipped for only one VIS per briefing. This presents a problem for multi-client briefings, as each client's information (computing environment, competitive issues, etc.) is different. As a remedy to the problem, a new VIS called an MCB (for multi-client briefing) is being developed. The new MCB will allow for as many VIS's as are needed to be placed within it, linking all of them together for the same briefing. The process for requesting an MCB will be significantly different from what the sales force is currently used to. Word of the new MCB offering is being spread through the appropriate chains of command; however, the sales force currently is not trained on how to request a multi-client briefing using the new MCB form.

The desired outcome of the project is for IBM software sales representatives to be trained to effectively communicate the clients' issues to the briefing centers via the new MCB form. In turn, the IBM SW EBC program will have a more effective method for capturing information for multi-client briefings, thereby delivering briefings on a much higher scale for those clients.

Information Gathering

The instructional designer will gather the following information:

- Interviews with key sales representatives
- Interviews with briefing managers
- Interviews with briefing coordinators
- Interviews with MarketBound developers
- Minutes from MarketBound committee calls
- MCB implementation plan

Project Objectives

Deliverables: To develop a training program for the IBM software sales force which will address the following skills and knowledge areas:

- What constitutes a multi-client briefing
- When the MCB should be used
- How to complete and submit an MCB

Benefits: The IBM software sales representatives will be able to effectively communicate the clients' issues to the briefing centers via the new MCB form. In turn, the IBM SW EBC program will have a more effective method for capturing information for multi-client briefings, thereby delivering briefings on a much higher scale for those clients.

Budget: The cost of the training is negligible, as all resources will come from within IBM with no dollar amount associated with their services.

Schedule: See Appendix A for Gantt chart

Constraints

- **Time**
 - The subject matter experts are key sales representatives, briefing managers, briefing coordinators, and MarketBound developers who have full time jobs. Scheduling time with each of these people who are already extremely busy meeting the demands of their regular duties will be challenging.
 - The time between the roll-out of the MCBs and the start of this project is short. Gathering the appropriate information and training the sales representatives prior to the roll-out will be a challenge.
- **Training delivery method**
 - Due to the software sales force being spread throughout the world, the only real option for delivery is online.
 - IBM Global Education will not host the training, so it will be located directly on the main page of the SW EBC web site.
- **Publicizing of training**
 - The fact that the training is being offered will need to be publicized through many different channels (such as brand flashes, GEO calls, etc.), not solely on the SW EBC web site.

Alternative Analysis

In addition to the proposed analysis, the IBM Software Executive Briefing Center program could consider the following:

Alternative Analysis: The IBM Software Executive Briefing Centers will publicize the MCBs through various channels and will offer the tool on the briefing request web site without offering any formal training for the sales force.

Development Team and Position Descriptions

Project Manager: Will create conceptual development and background, identify project scope, product specifications, constraints, estimate resources, manage development team, create evaluation procedures, identify, assess, and manage project risks, create work breakdown structures and identify major milestones, and handle all network planning and scheduling. Will work with all members of development team and oversee their completion of work packages.

Instructional Designer: Will work with subject matter experts, MarketBound developers, project manager, and multimedia developer to create an online instructional demo, as well as a downloadable, printable quick-reference guide.

Multimedia Developer: Will work with instructional designer to create an online instructional demo and a downloadable, printable quick-reference guide.

Subject Matter Expert (sales representative): Will work with project manager, instructional designer, MarketBound developers, briefing manager, and briefing coordinator to understand knowledge and skill level of sales representatives with regard to MCBs.

Subject Matter Expert (briefing manager): Will work with project manager, instructional designer, MarketBound developers, and briefing coordinator to understand briefing needs from a briefing manager perspective.

Subject Matter Expert (briefing coordinator): Will work with project manager, instructional designer, MarketBound developers, and briefing manager to understand briefing needs from a briefing coordinator perspective.

Subject Matter Expert (MarketBound developer): Will work with project manager, instructional designer, and multimedia developer to communicate the MCB process, as well as the graphic user interface of the new MCBs.

Resource Estimates

Resource	Amount	Total
<i>Personnel</i>		
Sales representative	\$0 (included in job)	\$0
Briefing manager	\$0 (included in job)	\$0
Briefing coordinator	\$0 (included in job)	\$0
MarketBound developer	\$0 (included in job)	\$0
Multimedia developer	\$0 (included in job)	\$0
Project manager	\$0 (included in job)	\$0
Instructional designer	\$0 (included in job)	\$0
<i>Personnel Total</i>		<i>\$0</i>
<i>Materials</i>		
n/a		
<i>Locations</i>		
n/a		
<i>Resources</i>		
Long distance phone call charges	\$100	\$100
Teleconferencing services	\$400	\$400
Intranet server space	\$1000	\$1000
<i>Resources Total</i>		<i>\$1500</i>
<i>Locations</i>		
n/a		
<i>Summative Evaluation</i>		
Evaluation of online instructional demo	\$0 (included in job)	\$0
Evaluation of downloadable, printable quick-reference guide	\$0 (included in job)	\$0
<i>Evaluation Total</i>		<i>\$0</i>
TOTAL ESTIMATE		\$1500

Evaluation Procedures

The training package for the IBM Software Executive Briefing Center program MCBs will be summatively evaluated as follows:

- Online instructional demo
 - Will be evaluated by successful completion of MCBs by IBM software sales representatives without having to call briefing center coordinators for help. Each briefing center coordinator will keep a daily log of MCB help calls which will be submitted weekly to the MarketBound committee.

- Downloadable, printable quick-reference guide
 - Will be evaluated by successful completion of MCBs by IBM software sales representatives without having to call briefing center coordinators for help. Each briefing center coordinator will keep a daily log of MCB help calls which will be submitted weekly to the MarketBound committee.

RISK MANAGEMENT

Risk Identification and Assessment	
Definition	<p><i>Condition:</i> Subject matter experts are not able to meet the timeline requirements to assist in the development of the online instructional demo and the downloadable, printable quick-reference guide due to their own time constraints.</p> <p><i>Consequence:</i> Design and development of the MCB training components for the IBM software sales representatives will be slowed down. This could result in a delay in rolling out the MCBs to MarketBound.</p>
Probability	Using the risk selection matrix, it has been determined that the probability of this risk occurring is medium and the severity of the consequences is medium, resulting in a medium risk.
Responses	<p>In order to monitor and minimize this risk, the following actions will be taken:</p> <ul style="list-style-type: none"> • The subject matter experts' Lotus Notes calendars will be checked for busy and open times. Lotus Notes calendar invitations will be sent two weeks ahead of time with copies to the subject matter experts' administrative assistants in order to secure time on their calendars.

Risk Identification and Assessment	
Definition	<p><i>Condition:</i> Publicity for the MCB training is not included in the proper channels, resulting in the sales representatives not being aware it is available.</p> <p><i>Consequence:</i> Sales representatives either do not utilize the MCB feature or overload the briefing coordinators with calls for help due to not having participated in the training.</p>
Probability	Using the risk selection matrix, it has been determined that the probability of this risk occurring is low and the severity of the consequences is low, resulting in a low risk.
Responses	<p>In order to monitor and minimize this risk, the following actions will be taken:</p> <ul style="list-style-type: none"> • The SW EBC business development committee will submit the flashes through their channel contacts.

PROJECT WORK

Deliverables

To develop a training program for the IBM software sales force which will address the following skills and knowledge areas:

- What constitutes a multi-client briefing
- When the MCB should be used
- How to complete and submit an MCB

Major Milestones

Milestone	Estimated Completion Date
Completion of online instructional demo	February 7, 2007
Completion of downloadable, printable quick-reference guide	February 7, 2007
Completion of formative evaluation	March 1, 2006
Completion of summative evaluation	April 19, 2006

Communication Plan

The team will communicate by email and telephone with periodic team meetings via teleconference. Team members will email the project manager on a weekly basis with their progress for the week. The project manager will use the individual updates to send out a project progress update each week via email. Any meetings will be held via teleconference and will be announced by the project manager via a Lotus Notes calendar invitation.

Work Breakdown Structure

1.0 Conduct front-end analysis to identify instructional goals

- Already completed prior to beginning project

2.0 Conduct an instructional analysis

- 2.1-Classify instructional goals into domains (intellectual skill, verbal information, psychomotor skill, attitude)
- 2.2-Identify the major items learners must be able to perform in order to demonstrate they have mastered the goal
- 2.3-Create a diagram which illustrates what the learners will be doing when they perform the instructional goal

2.3.1-Identify what the learner will be doing step-by-step when they perform the instructional goal

2.3.1.1-Identify the main steps

2.3.1.2-Identify the sub steps

2.3.1.3-Identify the subordinate skills

2.3.1.4-Identify the entry behaviors

3.0 Analyze learners and contexts

3.1-Identify target audience

3.1.1-Identify target audience age

3.1.2-Identify target audience entry behaviors

3.1.3-Identify target audience prior knowledge of the topic area

3.1.4-Identify target audience attitudes toward content and potential delivery system

3.1.5-Identify target audience academic motivation (ARCS)

3.1.6-Identify target audience educational and ability levels

3.1.7-Identify target audience general learning preferences

3.1.8-Identify target audience attitudes toward training organization

3.1.9-Identify target audience group characteristics

3.2-Analyze performance context

3.2.1-Analyze managerial or supervisor support

3.2.2-Analyze physical aspects of the site

3.2.3-Analyze social aspects of the site

3.2.4-Analyze relevance of skills to workplace

3.3-Analyze learning context

3.3.1-Analyze compatibility of site with instructional requirements

3.3.2-Analyze adaptability of site to simulate workplace

3.3.3-Analyze adaptability of delivery approaches

4.0 Write performance objectives

4.1-Review goal statement

4.1.1-Edit the goal to reflect the context

4.2-Write terminal objective

4.3-Write an objective for each step in the instructional analysis

4.4-Write an objective for each sub-step under a major step in the instructional analysis

4.5-Write objectives for all subordinate skills

4.6-Write objectives for entry behaviors if some learners are likely not to possess them

5.0 Develop assessment instruments

5.1-Design criterion-referenced test

5.1.1-Determine mastery levels

- 5.1.2-Write test items
- 5.1.3-Set mastery criteria
- 5.1.4-Sequence items
- 5.1.5-Write directions
- 5.1.6-Develop instrument to measure performances, products, and attitudes

6.0 Develop instructional strategies

6.1-Select a delivery system

- 6.1.1-Consider the goal, learner characteristics, learning and performance contexts, objectives, and assessment requirements
- 6.1.2-Review the instructional analysis and identify logical clusters of objectives that will be taught in appropriate sequences
- 6.1.3-Plan the learning components that will be used in the instruction
- 6.1.4-Choose the most effective student groupings for learning
- 6.1.5-Specify effective media and materials that are within the range of cost, convenience, and practicality for the learning context
- 6.1.6-Assign objectives to lessons and consolidate media selections

6.2-Identify a teaching sequence and manageable groupings of content

6.3-Determine the size of the cluster, or the amount of information to be presented

- 6.3.1-Consider the age level of the learners
- 6.3.2-Consider the complexity of the material
- 6.3.3-Consider the type of learning taking place
- 6.3.4-Consider whether the activity can be varied, thereby focusing attention on the task
- 6.3.5-Consider the amount of time required to include all the events in the instructional strategy for each cluster of content presented

6.4-Cluster and sequence the content

6.5-Prescribe the preinstructional, assessment, and follow-through learning components

6.6-Prescribe the content presentation and student participation components

7.0 Develop and select instructional materials

7.1-Review the instructional strategy for each objective in each lesson

7.2-Survey the literature and ask subject matter experts to determine what instructional materials are already available

7.3-Determine whether new materials need to be designed or whether available materials can be adopted or adapted

7.4-Review analysis of learning context

- 7.5-Plan and write the instructional materials based on the instructional strategy in rough draft form
 - 7.5-Review each completed lesson or learning session for clarity and flow of ideas
 - 7.6-Write the accompanying instructions to guide the learners through the activities, using one complete instructional unit
 - 7.7-Begin evaluation activities
- 8.0 Design and conduct formative evaluations**
- 8.1-Review instructional materials
 - 8.1.1-Subject matter experts review instructional materials
 - 8.1.2-Target audience specialist reviews instructional materials
 - 8.2-Conduct on-to-one evaluation with learners
 - 8.2.1-Select three target audience learners
 - 8.2.2-Collect data
 - 8.3-Make changes to instructional materials based on one-to-one evaluations
 - 8.4-Conduct small-group evaluation
 - 8.4.1-Select 8 to 20 learners with a variety of characteristics
 - 8.4.2-Collect data
 - 8.5-Make changes to instructional materials based on small-group evaluation
 - 8.6-Conduct field trial
 - 8.6.1-Select appropriate location for field evaluation
 - 8.6.2-Select at least 30 learners
 - 8.6.3-Collect data
 - 8.7-Make changes to instructional materials based on field trial
- 9.0 Design and conduct summative evaluation**
- 9.1-Select evaluators to conduct summative evaluation
 - 9.2-Design evaluations
 - 9.3-Document strengths and weaknesses of the instruction
 - 9.4-Design and write summative evaluation report

NETWORK PLANNING AND SCHEDULING

Network diagram showing durations and earliest start and finish

See Appendix A

Network diagram showing durations and latest start and finish times

See Appendix A

Schedule showing slack

See Appendix A

Critical Path

See Appendix A

Revised Schedule

See Appendix A