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Project Management Plan

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### ***Executive Summary***

Geographic Bank (“Geographic” from here on) is based out of Birmingham, Alabama covering areas from the southeastern US to the far Midwest. Due to a recent merger with Rebel Planters, Geographic quoted over \$80 billion in assets and a market capitalization of approximately \$14 billion as of July 1, 2004. Serving over 5 million customers throughout the South, Midwest and Texas, the new Geographic is a full-service provider of retail and commercial banking, trust, securities brokerage, mortgage, and insurance products and services.

A major component of any bank is the ability to offer loans to customers with the intention of earning interest revenue from the customers. The following proposal was devised because of a lack of efficiency in the loan process. Loan Operations associates have the inability to effectively process materials in a timely manner and in a manner that exemplifies their understanding of the work. With the recent merger, the number of loan applications is expected to increase tremendously requiring that the process at Geographic be more efficient.

As you will see throughout this proposal, a training session for loan operations associates is the method used to solve the problem. The process including implementation will begin at the end of November 2004 through the end of February 2005. This proposal will break down the actual problem and identify the actual gap to be addressed, as well as the solution to obtaining the desired situation. All major steps to meeting the goal will be thoroughly outlined, including the specifications of the project and the work breakdown structure. To aid in understanding the project blueprint, several charts and diagrams have been added to complement the material in this scope document.

### ***Problem Statement***

During the fall of 2002, Geographic’s Loan Operations division was receiving complaints from their internal clients, as well as Loan Operations supervisors, that the majority of Loan Operations Associates were not able to handle certain levels of Loan processing tasks related to understanding how items were calculated and the bookkeeping and accounting terminology. Many internal customers were being referred by Loan Operations Associates to upper management to answer questions relating to bookkeeping and accounting, and during several instances of power outages or down equipment time, Loan processes were put on hold until equipment was restored because the Loan Operations Associates were unable to manually process loan information. The result of this problem was lengthy loan processing causing some loans to be lost to other organizations.

### ***Information Gathering:***

As a result of the Front End Analysis and Needs Assessment, it was found that the Loan Operations Associates’ major gap of concern dealt with the amount of time it takes to process the front end of the loans (Front end meaning the calculations necessary to ‘bump’ loan applications to the desirable stage and pass on to management for final approval). The found cause of the amount of loan process time was the lack of knowledge possessed by Loan Operations associates in the areas of accounting and bookkeeping. It is expected that Loan Operations Associates understand the basic accounting principals such as Debits, Credits, Income, Expense, Assets, Liabilities, Capital, Interest, and Amortization. Unfortunately, based on the performance levels of the associates, they are unable to distinguish between these major accounting principals and components. From that assessment it can be concluded that:

*Current Situation: Loan operations associates are taking an average of 5 working days to process the front end of loans.*

*Desired Situation: Loan operations will take an average of 2 working days to process the front end of loans*

*Gap: There is a measurable gap of 3 working days here that needs to be eliminated based on the expected amount of processing time set by management*

It is believed that the lack of accounting knowledge is hindering the Loan operations associates from being able to process the loans efficiently because they have to ask certain questions about terminology, are unable to manually process the loans as needed, and cannot answer basic questions by internal and/or external customers. From the assessments and final analysis of the management team, it was concluded that the most suitable method for closing the above gap is to put the Loan Operations Associates through training that would increase their knowledge in the accounting areas noted above. The gap associated with the lack of knowledge within the Loan Operations Associates has an effect on other areas within the department. Therefore the overall desired outcomes of the training course are:

- All loan ops associates will have understanding of accounting basics
- Decrease in time of loan process
- Increase in efficiency and effectiveness of loan process
- Increase in attitudes (confidence and motivation) as a result of increasing knowledge base of job

There are approximately 300 loan operations associates. Based on an initial analysis of the skills of the loan operations associates, approximately 200 of those workers need to be involved in the training course due to lack of skills and experience in their jobs. Therefore the information within this project is a reflection of the needs of the 200 associates (Another analysis of the identified 200 associates will be conducted during the process of the project to observe their learning styles and other factors involving learning including observations and surveys).

***Constraints:***

Fortunately for Geographic Bank, they have a long tradition of being a great place to work, and generally have very low turnover rates, especially in the Loan Operations Division, and they can avoid certain constraints on that reputation alone. Even with a great company such as Geographic, constraints are possible and unavoidable under certain circumstances. Based on the research of the company, the following constraints evolved that could hinder some of the efforts of implementing the training.

The first being lack of incentives to offer the employees for going through the training to increase their knowledge of accounting. Many of the Loan Operations associates are content with their jobs and don't feel a need to improve their skills or seek advancement. With the great reputation of enjoying what you do at work, many Geographic employees would rather give up higher pay and promotions to simply enjoy what they do.

Not only are incentives needed to promote the effort, but the mere attitudes of the associates, for all reasons, is an issue. Employees may be insulted about the quality of their work and may lose morale, they may feel threatened and be “on edge” while working, and they may not see the overall benefit for change, especially the veteran workers in the division.

Another constraint which is one of the major obstacles to be addressed in the delivery methods, and that is that Loan Operations cannot be away from their desks for long periods of time. It is already a concern that the loan process is extensive, and having Loan Operations Associates away from their desk even for one day to go through training is not efficient.

Not only is having Loan Operations Associates away from their desks an issue, but having other personnel away from their duties to train them is also an issue. Generally training courses are administered by persons who are trained to assist the learners, but those persons are not qualified in the field of accounting to offer quality training. Therefore, a subject matter expert is needed to conduct this training, and that would require them to be away from their normal duties to conduct the training.

***Alternative Analysis:***

One alternative to overcoming the gap and the constraints could be to hire employees with accounting/bookkeeping knowledge and dismiss the employees who are incapable. Unfortunately, there are over 300 Loan Operations Associates and the process of firing and rehiring would be extensive and increase the inefficiency within the division. Also, hiring employees with prior accounting knowledge would be faced with another constraint. The persons coming in with the knowledge will most likely expect more pay than those who don't have the knowledge, and it will also be difficult to find and/or keep the knowledgeable candidates because they would be able to take better paying jobs elsewhere.

It could also be suggested that the loan operations software be updated or replaced making the ease of use more convenient to the users. Unfortunately, a revamping of the software or replacing it, would take a lot of time to properly identify and install the software. Retraining would be an issue, and this would still not increase the knowledge base of the associates to the point where they would be able process loans manually if ever needed.

Another considered alternative is to simply create detailed job aids with accounting/bookkeeping terms and processes relating to Loan Operations tasks for Associates to follow at work. This method would be a good idea to use in conjunction with a training course, but not alone. Having a mandatory training course at least assures that they employees were at least given the material and participated in the effort to increase their knowledge. Giving them job aids cannot be enforced as well, and there is a high level of uncertainty that they will refer to them and gain the overall knowledge necessary to meet the goal.

Making the training completely online and self-paced would be another alternative to meeting needs for closing the gap of processing. The reason this would not be as effective is because of the nature of accounting. It requires more repetition and involvement through the lead of an instructor, using examples and relevance to their jobs. Because the environment here is the banking industry, it is important that the employees get the most out of the course as they can to understand accounting better.

Another alternative to overcoming the constraint pertaining to the Loan Operations being away from their desks is to split the training up. Let half get trained while the other half stays on duty, and then switch the roles. Sounds logical but then you must consider that although only half of the Loan Operations associates are away from their desk at a time, but the trainer will need to be away from their work twice as long. Also, having half of the Loan Operations associates away from their desks still leaves a “hole” of inefficiency because half as much work can be done.

### ***Project Objectives***

The ultimate goal of this project is to close the gap involving increased loan processing time due to lack of accounting knowledge. It is important that we keep the goals in mind throughout the project to make sure that the entire scope of the project is being met as well as making sure that we don't slide off track. Overall, we aim to close our gap of 4 days, while also offering the loan operations associates an opportunity to broaden their knowledge base and gain more importance to their job duties. The loan process will become more effective and efficient, and our associates will increase their own confidence levels as well as the confidence of management.

In terms of the process, the objective is to meet each milestone set, as well as staying as close to the budget as possible. Ample use of both human and financial resources is the key. The learner analysis as well as the delivery method is important because they are key to effectively meeting the needs of the loan operations associates to meet our overall objective of them gaining knowledge and improving performance.

### ***Deliverables/Delivery Strategies***

Time is a major concern of this project. It is essential that the loan operations associates complete the entire training method prior to the end of the calendar year to be ready to meet the challenges of changed interest rates and annual changes in customer wants and needs. Also to battle the attitudinal arenas involved in organizational change, the purpose of the content within the course will be instilled in each participant with enough time in advance for them to hopefully see the need (whether through the use of the champion and other possible change agents, or overemphasizing the possibilities involved in having the knowledge available in this course). It is important that we understand the challenges involved in time crunches such as these, including employees' time away from their daily tasks. The strategies below are designed to effectively meet those challenges.

Loan Operations Associates need to be involved a brief training course to touch on the basic areas of accounting which include: Debits, Credits, Income, Expense, Assets, Liabilities, Capital, Interest, and Amortization. The most efficient means of achieving this goal is through the use of a pre-course via CBT and also incorporating some instruction for recap and thorough emphasis. The pre-course will cover terminology and examples of accounting use relevant to their job duties.

The CBT will be an introduction to all the accounting concepts to lead up to an instructor-led course. The major method of delivery will be in the form of a one-day Instructor-led course involving interactive examples and problems for the students to engage in the learning process. Upon completion of the training, students will take an electronic mastery examination in which a minimum score is necessary to be deemed proficient. The following chart gives a complete synopsis of the delivery methods chosen in an effort to meet the project objectives and overcome the possible constraints.

| <b>Specifications of Product</b> |   |
|----------------------------------|---|
| Self-Paced CBT                   | <ul style="list-style-type: none"> <li>• The self-paced CBT course will give a thorough overview of the material to be covered in the Instructor led course with screen shots, examples charts and statements. An assessment at the end of the CBT will allow students to test their mastery and gather any questions they may still have to bring with them to the Instructor-Led course (Questions may be asked at the end of the Instructor-Led course if they are not touched on during the session).               <ul style="list-style-type: none"> <li>○ Developed in AuthorWare (already used in the company) and uploaded to the company server</li> <li>○ The CBT will be online allowing the trainees to remain at their workstations and allow them unlimited access to the course.</li> <li>○ They will have guides and manuals with additional learning tools available at their disposal. These manuals will have sections devoted to the instructor-led course as well. The students will be responsible for bringing manuals to the instructor-led course.</li> </ul> </li> </ul> |
| Instructor-led course            | <ul style="list-style-type: none"> <li>• The Instructor led course will contain an instructor manual with a script and solutions to student problems, a user/student manual with curriculum items, examples, self-check activities in each section in the form of both case studies and concept understanding (Multiple Choice, fill in the blank, True or False, etc.), and group interaction activities from the manual in each section.               <ul style="list-style-type: none"> <li>○ Each example will have a graphic relevant to what they may see on the screen or in hard documents at work, to begin giving them a feel of how the information is relevant to their jobs as they learn the accounting principles.</li> <li>○ The manual will be in line with the students' manuals</li> </ul> </li> <li>• A PowerPoint presentation will accompany the course to provide visual clarification and reinforcement.</li> </ul>  |
| Mastery Exam                     | <ul style="list-style-type: none"> <li>• To be taken within 5 days of the instructor-led course, preferably at the associates' desks               <ul style="list-style-type: none"> <li>○ Developed in AuthorWare</li> <li>○ They will print out a copy of their score for their files and the final score will automatically be sent to the OD&amp;L department</li> <li>○ Upon completing the Master Exam is when they can print out the additional job aids</li> </ul> </li> </ul>   |
| Job Aids                         | Electronic job aids with basic accounting terminology and some diagrams of the main accounting documents and tools (T accounts, general ledger, journal entries, financial statements, etc.) will be available for review or refresher purposes at all times following the course. Associates have the option to print or view.   |

***Development Team and Position Descriptions:***

In order to assure that the project development runs smoothly, a team must be devised to cover all areas involved in the development of the training process. It is important to have someone to push the project and increase the morale, while also having persons who are knowledgeable in the areas of design and development of training, and it is also necessary to have SME's on hand who are fluent in accounting and those that understand of the Loan Operations process. And finally a trainer is necessary to carryout the instructor-led portion. The table below describes the team members and their duties:

|   |  |
|---|--|
| <p><b>Project Manager</b></p>           | <p>Responsible for utilizing appropriate personnel to gather the specifics for the scope of the project. Upon understanding the scope, it is up to the project manager to understand the strengths of personnel to properly identify key team members and tasks to delegate.</p> <ul style="list-style-type: none"> <li>• Delegate duties to team members</li> <li>• Liaison between SME's, Clients, and team members</li> <li>• Supervise team leaders/Keep on schedule...Milestones, etc</li> </ul> <p>Each person involved in this project will be responsible for keeping the project manager up-to-date as to where they are in their roles, and how the project manager could possibly assist in meeting the timeline.</p> |
| <p><b>Sponsor</b></p>                   | <p>Person who seeks the attention of the need and lays it on the table. They feel strong about the process and want to see it done.</p>  |
| <p><b>Champion</b></p>                  | <p>Gain the morale of the persons involved and keeps the morale throughout the process.</p>  |
| <p><b>Instructional Design Team</b></p> | <p>Instructional Designer/Developer:</p> <ul style="list-style-type: none"> <li>• Use scoping document to design training media</li> <li>• Communicate with SME's and client with updates, needs, etc.</li> <li>• Develop the final training documents/programs for use</li> <li>• Orchestrate (with the designer) the Pilots, formative evaluations, etc.</li> <li>• Prepare for final stages to deliver to clients for use</li> </ul>  |
| <p><b>Subject Matter Experts</b></p>    | <p>Loan Ops Management:</p> <ul style="list-style-type: none"> <li>• Will offer insight to proper contacts in Loan Ops</li> <li>• Give input into the course design</li> </ul> <p>Chosen Loan Ops Associates:</p>  |

|                |   |
|----------------|---|
|                | <ul style="list-style-type: none"> <li>• Give input and feedback on the course design</li> <li>• Focus on areas necessary to relate accounting to the jobs/duties of the Loan Ops Associates</li> <li>• Work together with trainer to assure understanding during the course</li> <li>• At least one Loan Ops Associate present during instructor-led course for reference</li> </ul> <p>Accounting Department contacts:</p> <ul style="list-style-type: none"> <li>• Given input and feedback on the course design</li> <li>• At least one Accounting employee present during the instructor-led course for reference</li> <li>• Work together with trainer to help show the best methods of teaching the information</li> </ul> |
| <b>Trainer</b> | <ul style="list-style-type: none"> <li>• Works closely with SME's to understand best methods of teaching the information.</li> <li>• Works closely with designer to understand the delivery methods and prepare for instruction</li> </ul>  |

The resources necessary for this project are listed below. The allocation is based on the needs specified in the objectives and the overall delivery strategies. You will notice that costs for lunch during the training session have been budgeted. This is due to the culture at Geographic Bank where outside caterers are used to feed persons involved in training. Therefore a head count and cost must be allotted for the project.

***Resource Estimates:***

|  |   |
|--|---|
| Lead Instructional Designer  | Salary = \$4500/ month<br>= \$4500 x 3 = \$13,500   |
| Trainer  | Salary = \$5000/ month<br>= \$5000 x 3 = \$15,000   |
| At least (2) Subject Matter Experts<br>Preferably (4)  | Salaries:<br>Accounting = \$5500/ month<br>= \$5500 x 3 = \$16,500<br>Loan Operations = \$4500/ month<br>= \$4500 x 3 = \$13,500  |
| Training Manuals<br>Based on the needs assessment data approximately 1/3 of the Loan Operations Associates will not need to go through the training based on skills. Therefore we will | <ul style="list-style-type: none"> <li>• Paper 200 x 50 pages = 10,000 pages<br/>= 10,000 x .03 = \$300</li> <li>• Binding 200 x .20 = \$40</li> <li>• Ink (3 cartridges) = \$150</li> <li>• Electricity (copying, printing, etc.)</li> </ul> |



|   |  |
|---|--|
| <p>assume the course if for 200 associates<br/>(300-100 = 200)</p>  | <p>10 hours x (5.6 cents per kilowatt hour x<br/>1000 kilowatt hours)<br/>= 10 x (.056 x 1000)<br/>= 10 x 56<br/>= \$560</p>   |
| <p>Printed Job Aids<br/>Based on the needs assessment data<br/>approximately 1/3 of the Loan Operations<br/>Associates will not need to go through the<br/>training based on skills. Therefore we will<br/>assume the course if for 200 associates<br/>(300-100 = 200)</p>              | <ul style="list-style-type: none"> <li>• Paper<br/>(200 x 5 sheets) = 1000 sheets x .03<br/>= \$30</li> <li>• Ink (1/3 cartridge) = \$50/3 = \$17</li> <li>• Electricity<br/>1 hour x (.056 x 100) = 1 x \$5.60</li> </ul> |
| <p>Lunch During Training Session<br/>Based on the needs assessment data<br/>approximately 1/3 of the Loan Operations<br/>Associates will not need to go through the<br/>training based on skills. Therefore we will<br/>assume the course if for 200 associates<br/>(300-100 = 200)</p> | <p>\$8.00/person<br/>200 x \$8.00 = \$1600</p>   |
| <p>Learner Survey</p>   | <ul style="list-style-type: none"> <li>• Will be submitted electronically to<br/>minimize costs</li> <li>• Geographic Bank has outstanding use<br/>of the company's Internet through<br/>Lotus Notes</li> </ul>            |
| <p>Attitude Survey</p>  | <ul style="list-style-type: none"> <li>• Will be submitted electronically to<br/>minimize costs</li> </ul> <p>Geographic Bank has outstanding use of<br/>the company's Internet through Lotus<br/>Notes</p>                |

**Risk Assessment**

Fortunately, due to the nature of this project the risk level is very low. As always, there is a risk of not meeting the deadlines or a risk that hopefully can be avoided well before the completion date, is the risk of developing poor instruction. The chart below describes the areas of risk that are most relevant the process involved in creating this course. The chart includes possible changes in procedure due to the new merger which may not occur until the middle of the project, sudden leave of the trainer or really of anyone involved in the process, changes in software used, loss of data due to a crash or technological error, and a possibility that the designer may need to be pulled away from this assignment into another assignment. Although each of these risks is possible, the probabilities are fairly low, but it is still necessary to make sure we are prepared to meet those situations as they arise.

| <b>RISK IDENTIFICATION AND ASSESSMENT</b> |   |  |   |   |  |
|---|---|--|---|---|--|
| <b>Definition</b>                         | <p><u>Condition:</u><br/>Due to the merger, loan process may change</p> <p><u>Consequence:</u> Learning objectives will change to meet needs of new loan process and the process of completing the accounting training will take longer</p> | <p><u>Condition:</u><br/>Trainer may take a job with another company</p> <p><u>Consequence:</u><br/>Will require more time to find a new trainer who has time in their schedule and/or need to train another trainer</p> | <p><u>Condition:</u><br/>Company may switch from using AuthorWare to another program such as flash or toolbox</p> <p><u>Consequence:</u><br/>Server needs will be accommodated to make sure the course can be uploaded properly. May have to restart the design/development of the course</p> | <p><u>Condition:</u><br/>Computer with all multimedia data on it may crash due to a virus or technical malfunction</p> <p><u>Consequence:</u><br/>Increase in project time to restart efforts</p> | <p><u>Condition:</u><br/>A company emergency may arise that calls for the designer/developer to act spontaneously to a training need and neglecting the accounting course</p> <p><u>Consequence:</u><br/>Delay in the process of the course which ultimately effects the effectiveness and efficiency of the loan process (could cost the bank potential interest revenue or leverage options)</p> |

|                           |   |  |  |  |   |
|---------------------------|---|--|--|--|---|
| <p><b>Probability</b></p> | <p>20% Risk</p> <p>.20 X \$5000 = \$1000</p> <p>Will add about 1 more month to the approximately 3 month project (33%)</p> <p>1.33 x 3 months = 4 months</p>  | <p>50% Risk</p> <p>.50 x \$1000 = \$500</p> <p>Will add about two weeks to the approximately 12 week project (16.66%)</p> <p>1.1666 x 12 = 14 weeks</p>  | <p>50% Risk</p> <p>.50 x \$1500 = \$750</p> <p>Will add about 1 week to the 12 week project if just needing to adjust server specs (8.33%)</p> <p>1.833 x 12 = 13 weeks</p> <p>If project needs to be started in the middle it could add 1.5 months to the project time (.50%)</p> <p>1.50 x 3 = 4.5 months</p>              | <p>50% Risk</p> <p>.50 x 10,000 = \$5000</p> <p>If project needs to be started in the middle it could add another (50%) to the project time</p> <p>1.50 x 3 = 4.5 months</p> | <p>75% Risk</p> <p>.75 x \$10,000 = \$7500</p> <p>Could add another (66%) to the project time</p> <p>1.66 x 3 = 5 months</p>  |
| <p><b>Responses</b></p>   | <ul style="list-style-type: none"> <li>• Design a universal accounting course that can be administered regardless of the overall process</li> <li>• Meet with Loan executives who may have some influence on potential changes and get an idea of what possible changes could be and have backup data available in case of the change.</li> </ul> | <ul style="list-style-type: none"> <li>• Contract agreements with trainer</li> <li>• Have a backup trainer on hand or use another SME who has been apart of the team from the start</li> </ul> | <ul style="list-style-type: none"> <li>• May need to address the technology resource personnel and ask them to allow AuthorWare to remain accessible until the completion of this project</li> <li>• Include the designer in the process of purchasing new software and use technology they have experience using</li> </ul> | <ul style="list-style-type: none"> <li>• Save all files each hour to backup devices (USB, CD, server locations)</li> </ul>   | <ul style="list-style-type: none"> <li>• Have a backup person who can pick up where designer left off if needed (could be an administrative assistant with time, or another designer and/or accounting specialist)</li> </ul> |

**Work Breakdown Structure ([See MS project for thorough description of WBS](#)):**

The Work Breakdown Structure is to be determined by the Project Manager based on input from colleagues (members of the team on this project). The project manager's main role is to delegate the tasks and monitor benchmarks and milestones while supported the team members. Each category in this WBS lists those persons involved in the duties necessary to complete the project:

**1.0 Conduct Needs Assessment (conducted previously) [Management]**

- 1.1 Observe Needs Assessment for possible areas to readdress
- 1.2 Finalize Needs Assessment data to begin analysis

**2.0 Conduct Instructional Analysis [Designer/SME's/Management]**

- 2.1 Locate Learning Goals
  - 2.1.1 Examine the gap
  - 2.1.2 Meet with SME's
  - 2.1.3 Meet with Management
- 2.2 Categorize Learning Goals

**3.0 Conduct Learner Analysis [Designer]**

- 3.1 Gather Group Information
  - 3.1.1 Gather Extant Data from HR
  - 3.1.2 Observations
- 3.2 Gather Individual Information
  - 3.2.1 Personality and Attitude Survey
    - 3.2.1.1 Design Brief Survey
    - 3.2.1.2 Create Survey
    - 3.2.1.3 Proof Survey
    - 3.2.1.4 Deliver Survey
    - 3.2.1.5 Analyze Survey Results
  - 3.2.2 Observations
  - 3.2.3 Extant Data from HR

**4.0 Analyze Learning Environment [Designer]**

- 4.1 Observations
  - 4.1.1 Observe Organizational Environment
  - 4.1.2 Observe Work Environment
  - 4.1.3 Observe the Work
  - 4.1.4 Observe the Workers
- 4.2 Interviews with a sample group of associates
- 4.3 Survey of environment
  - 4.3.1.1 Design Brief Survey
  - 4.3.1.2 Create Survey
  - 4.3.1.3 Proof Survey
  - 4.3.1.4 Deliver Survey
  - 4.3.1.5 Analyze Survey Results
- 4.4 Meet with Management and SME's

**5.0 Create Performance Objectives [Designer/SME's/Management]**

- 5.1 Revisit gap assessment
- 5.2 Create objectives for each phase
  - 5.2.1 Group Objectives
  - 5.2.2 Sub-Phase objectives

6.0 Create Assessment Instruments [**Designer/SME's**]

6.1 Design Criterion Reference Test

6.1.1 Proof CRT

6.1.2 Finalize CRT

6.2 Determine Mastery Levels

6.3 Prepare Testing Items

6.3.1 Design tests for each section of objectives

6.3.2 Design Overall Mastery Exam

6.3.3 Proof Tests

6.3.4 Finalize Tests

7.0 Identify Instructional Strategies [**Designer/SME's/Trainer**]

7.1 Develop logical sequences and grouping of objectives

7.1.1 Decide on delivery system

7.1.1.1 Decide on delivery methods

7.1.1.1.1 Revisit Objectives

7.1.1.1.2 Meet with SME's and Management

7.1.1.1.3 Meet with Trainer

8.0 Develop Instructional Materials [**Designer/SME's/Trainer**]

8.1 Meet with SME's

8.1.1 Revisit Instructional Strategies

8.1.2 Consider current materials available

8.1.3 Account for any new materials that may be needed

8.2 Design CBT

8.3 Proof CBT

8.4 Test CBT

8.5 Design Manuals

8.6 Proof Manuals

8.7 Pilot CBT

8.8 Finalize CBT

8.9 Deliver CBT for use

9.0 Conduct Formative Evaluations (To be conducted at each milestone indicated on Gantt Chart) [**Designer/SME's/Management/Trainer**]

9.1 Design Formative Evaluations

9.2 Decide on evaluation methods and strategies

10.0 Revise Instruction as needed based on evaluations [**Designer**]

11.0 Implement Instruction [**Designer/Trainer/SME's**]

11.1 Pre-CBT

11.2 Instructor-led training

11.3 Mastery Examination

12.0 Conduct Summative Evaluations [**Designer/SME's/Management/Trainer**]

12.1 Design summative evaluation

12.2 Decide on evaluation methods and strategies