

Instructional Design Project Plan

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Case Study

Introduction and project background

The Electron Corporation is an international corporation operating in 16 different countries and is becoming more involved in the production of consumer-related goods. Designing a course that would provide a proactive approach to product safety was paramount in order to prevent lawsuits from happening. Although there are many stakeholders, the course would need approval from the legal department. Engineers in the various fields believe that the problem is not a knowledge issue but rather it is an issue of communication. According to the engineers, there is no system-wide approach to report and document product liability issues.

Purpose and objectives

The purpose of this project is to create an instructional module that would deliver a system wide approach to product safety. The project's aim is to prevent lawsuits from happening. A successful outcome will be determined by an overall decrease in product safety concerns. In creating the instructional module, it is important not to create explicitly stated internal standards and procedures.

The project will be a hybrid course, offering online and in-person sessions, including a Q&A session with the leadership, engineering, and legal teams. Due to the many demands placed on employees' time, the course will be limited to one day.

Acceptance Criteria

The overall goal of this project is to provide a "proactive approach to product safety." A major hurdle in getting this project accepted is in getting approval from the legal department at the Electron Corporation. There is a pre-existing course that was develop and approved by the legal department. Modifications will be made to that course and will be submitted for approval.

The course will not exceed one day and no corporate specifics will be included in the course. Hypothetical role-play scenarios and fictitious product calls from customers will be used to establish an understanding of systems and processes. Proposed agenda as follows:

<u>Time</u>	<u>Event</u>	<u>Location</u>	<u>Led by</u>
8:00am – 8:45am	Breakfast meet and greet	Cafeteria	Stan Neuhaus
8:45am – 9:00	Overview of schedule and logistics	Cafeteria	Louise Masoff
9:00 – 12:00pm	Training Presentation	Online session	Richard Mull
	Online training with legal dept.	Meeting Room	
12:00pm – 12:45pm	Lunch	Cafeteria	
1:00pm – 2:00pm	Training Presentation	Online session	Stan Neuhaus
2:15pm – 3:00pm	Online training with engineering	Meeting Room	Louise Masoff
3:00pm – 4:00pm	Q&A session	Cafeteria with a	Craig Gregersen (host)
		live stream	

Period of Performance

The Electron Corporation set specific parameters on the amount of time allocated to this project. Louise, the training project manager, is giving two weeks to conduct phone interviews and an additional three weeks to develop the course. The total length of the course cannot exceed more than one workday. In addition to adhering to these specific parameters, all course content will need to be approved by the legal department. No specific timeframe on how long it would take legal to approve the project was provided. I am requesting that an additional two weeks be provided after receiving feedback from legal to make modifications deemed necessary by legal and resubmit the course for approval once again.

Rationale Statement

This project is based on the case study of Craig Gregersen who is hired to design a training program that would be delivered to all the employees of an international corporation. The project was allotted 5 weeks for completion, but I assume additional time is needed to get approval from the legal department. Participants will have access to computers, microphones, and web cameras and will be able to live-stream all training programs.

Although Electron is an international organization, the training program will be suited to participants in the United States. The laws change from one country to the next and one assumption identified in this section is that stakeholders from other countries will benefit from a course more catered to their own country.

Assumptions made in the responsibilities chart are that leaders will complete their portions of the training on time and in good faith. This also assumes there is very little scope creep because all changes must be approved by legal, and this may delay the project's timeline. Another assumption is that each team leader has a team of qualified individuals working under them.

Stakeholder List and Descriptions

Key stakeholders include Richard Mull (legal contact), Stan Neuhaus (senior design engineer and chair of the Safety Steering Committee), Louise Masoff (training project manager), Greg Gregerson (instructional designer), project management interns (3), the engineering team, and technicians.

Richard Mull is the legal contact provided by Electron Corporation. Mull will provide legal guidance to prevent any potential litigation. Mull will review all training documents for approval.

Stan Neuhaus is a senior designer and chairman of the Safety Steering Committee. Neuhaus will assist in determining which products might produce liability, especially in consumer-oriented products.

Louise Masoff is the training project manager and will assist in writing objectives and instructional content. Masoff will focus on providing a proactive approach to product safety.

The line engineers and management teams will provide additional input and act as the subject matter experts at various locations. Technicians, process engineers, field engineers will participate in the training programs.

Work Breakdown Structure

Project Activities

This project will require approximately 7 weeks to complete. The training will be conducted in one business day, with breakfast and lunch included. In the morning session which follows the breakfast meet and greet, participants will attend a training provided by the legal team. Lunch will be from 12:00pm to 12:45pm and will be followed by the training conducted by the engineering team. The day will end with a Q&A session and course evaluation.

Deliverables

1. Needs Analysis
 - a. Project schedule
 - b. Budget
2. Design and Development
 - a. Communication describing assigned roles
 - b. Pre-existing training modifications
 - c. Documents from each team
3. Legal
 - a. Report from legal with approval or rejection of submitted training materials and modifications
 - b. Finalized deliverables
4. Logistics
 - a. Catering contract
 - b. Secure training room

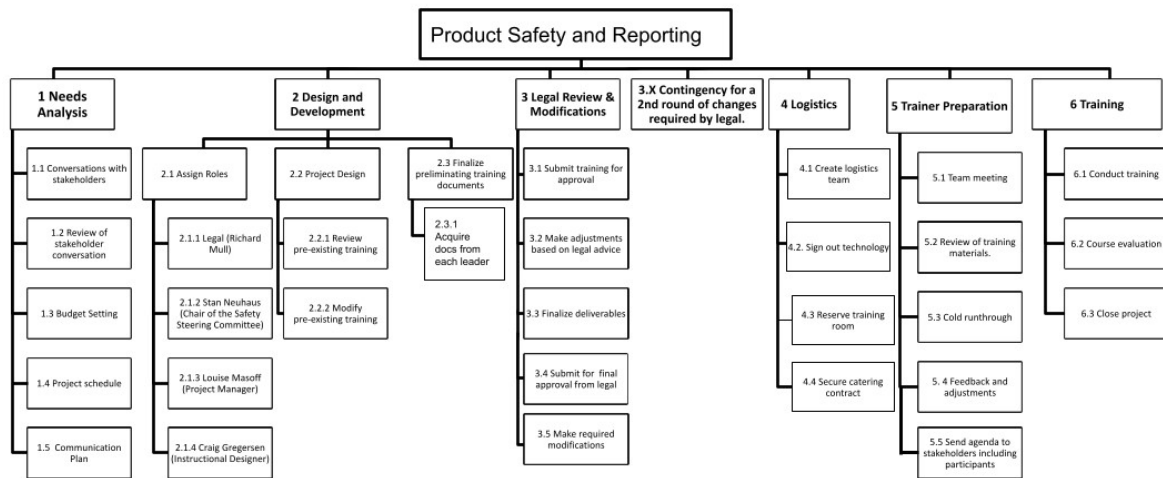
- c. Acquire technology needed (laptop, speakers, projector, clicker, microphone, video camera for live stream, streaming platform)

5. Trainer Preparation

- a. Send agenda to stakeholders

6. Delivery/Training

- a. Training materials for print
- b. Course evaluation survey



Responsibility Chart

RASCI Matrix		ROLES									
		Electron Corporation Legal Department	Richard Mull (Legal)	Stan Neuhaus (Engineering)	Louise Masoff (PM)	Greg Gregerson (ID)	Intern 1	Intern 2	Intern 3		
Deliverable or Task	Status	Sponsor /Leader			Project Team						
Phase 1 - Needs Analysis											
1.1	Stakeholder Conversation Planning		S	R	C	A	S				
1.2	Review of stakeholder conversation			A	I	R	S				
1.3	Budget Setting		C	A	I	R	S				
1.4	Project Schedule		C	A	I	R	S	D	D	D	
1.5	Commucation Plan		C	A	I	R	S				
Phase 2 - Design & Development											
2.1	Assign and Communicate Roles		I	C	C	A	R	D	D		
2.1.1	Legal (Richard Mull)			A							
2.1.1	Intern #1			R							
2.1.2	Engineering (Stan Neuhaus)				A						
2.1.2	Intern #2				R						
2.1.3	Project Manager (Louise Masoff)					A					
2.1.3	Intern #3					R					
2.1.4	Craig Gregersen (Instructional Designer)						A				
2.2	Project Design		I	C	C	A	R	D	D		
2.2.1	Review pre-existing training materials					A	R	S			

2.2.2	Modify pre-existing training materials					A	R			S
2.3	Finalize preliminary training documents		I	I	S	A	R	D		
2.3.1	Acquire training documents from each leader		I	I	S	A	R	D		
Phase 3 - Legal Review & Modifications										
3.1	Submit modified training for approval		I	R	S	A	S	D	D	
3.1.1	Generate report w/approval or rejection of submitted training documents and necessary modifications		A	R	I	S	I			
3.2	Make adjustments based on legal advice		C	C	S	A	R	D	D	D
3.2.1	Submit modified training documents to project manager after required changes are made (each team).			I		A	R	D		
3.3	Finalize approved deliverables		I	C	S	A	R	D	D	D
3.4	Make required modifications		I	C	S	A	R	D	D	D
3.5	Submit to legal again for approval		I	R	S	A	S			
Phase 4 - Logistics										
4.1	Create logistics team				A	I	R	S	D	D
4.2	Sign out technology				S	A		R	D	
4.3	Reserve training room		I	I	S	A	S	D	R	
4.4	Secure catering contract		I	C	S	A		S	S	R
Phase 5 - Training Preparation										
5.1	Team meeting and setting expectations		I	C	C	A	R	D	D	D
5.2	Cold runthrough of training		I	R	R	A	R	D	D	D
5.3	Feedback and slight adjustments			R	I	A	R			
5.5	Send agenda and links to stakeholders and participants		C	I	I	A	R	R	D	D
Phase 6 - Training/Delivery										
6.1	Conduct course training		I	S	I	A	R	D	D	D
6.2	Course evaluation			S	R	A		D	D	D
6.3	Close out project		I	S	I	A	R	D	D	D

Assists those who are responsible for a task.	Driver
Assigned to complete the task or deliverable.	Responsible
Has final decision-making authority and accountability for completion. Only 1 per task.	Accountable
Provides support during implementation.	Support
An adviser, stakeholder, or subject matter expert who is consulted before a decision or action.	Consulted
Must be informed after a decision or action.	Informed

Project Schedule

Project Schedule

	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION (In days)
1	Needs Analysis				6
1.1	Stakeholder Conversation Planning	Richard Mull	3/14/22	3/21/22	
1.1.1	Schedule Stakeholder Conversation	Louise Masoff	3/14/22	3/17/22	3
1.1.2	Stakeholder Meeting	Louise Masoff	3/17/22	3/17/22	1
1.1.3	Scope and Goal Setting	Craig Gregersen	3/17/22	3/17/22	1
1.2	Meeting to review stakeholder conversation	Louise Masoff	3/18/22	3/18/22	1
1.3	Budget Setting	Louise Masoff	3/21/22	3/21/22	1
1.4	Project Schedule	Louise Masoff	3/21/22	3/21/22	1
1.5	Communication Plan	Louise Masoff	3/21/22	3/21/22	1
1.X	<i>Contingency time if project needs to be modified and submitted again</i>	Congingency day(cd)	3/22/22	3/22/22	1
2	Design and Development				7
2.1	Assign Roles	Craig Gregersen	3/23/22	3/23/22	1
2.1.1	Legal	Richard Mull			
2.1.2	Engineering	Stan Neuhaus			
2.1.3	Project Manager	Louise Masoff			
2.1.4	Instructional Designer	Craig Gregersen			
2.2	Project Design	Craig Gregersen			
2.2.1	Review pre-existing training	Louise Masoff	3/23/22	3/24/22	2
2.2.2	Modify pre-existing Training	Craig Gregersen	3/25/22	3/30/22	4
2.3	Finalize preliminary training documents	Craig Gregersen	3/31/22	3/31/22	1
2.X	<i>Contingency time if project needs to be modified and submitted again</i>	Congingency day(cd)	4/1/22	4/1/22	1
2.3.1	Obtain training documents from each team				0
3	Legal Review & Modifications				13
3.1	Training approval	Richard Mull			
3.1.1	Sumbit to legal dept for approval	Richard Mull	4/4/22	4/4/22	1

3.1. 2	Generate report with approval or rejection of submitted training documents and necessary modifications	Richard Mull	4/5/22	4/8/22	5
3.2	Make adjustments based on legal advice	Louise Masoff			
3.2. 1	Meet to discuss necessary changes	Craig Gregersen	4/11/22	4/11/22	1
3.2. 2	Set deadline	Craig Gregersen	4/11/22	4/11/22	1
3.2. 3	Make changes	Craig Gregersen	4/12/22	4/13/22	2
3.3	Finalize Deliverables	Louise Masoff	4/13/22	4/14/22	2
3.4	Submit to legal again for approval	Richard Mull	4/14/22	4/18/22	3
3.5	Make required modifications	Craig Gregersen	4/19/22	4/20/22	2
3.X	<i>Contingency time if project needs to be modified and submitted again</i>	Contingency day(cd)	4/21/22	4/21/22	1
4	Logistics				3
4.1	Create logistics team	Louise Masoff	3/14/22	3/14/22	1
4.2	Sign out technology	Intern #1	3/14/22	3/16/22	3
4.3	Reserve training room	Intern #2	3/14/22	3/16/22	3
4.4	Secure catering contract	Intern #3	3/14/22	3/16/22	3
5	Trainer Preparation				6
5.1	Team meeting	Louise Masoff	4/22/22	4/22/22	1
5.1. 1	Create meeting agenda	Intern #2	4/21/22	4/21/22	1
5.1. 2	Reserve training room	Intern #3	4/21/22	4/21/22	1
5.2	Review of training material	Craig Gregersen	4/23/22	4/23/22	1
5.3	Cold runthrough of training	Craig Gregersen	4/23/22	4/23/22	1
5.4	Feedback and adjustments	Craig Gregersen	4/24/22	4/25/22	2
5.5	Send agenda to all stakeholders	Louise Masoff	4/19/22		0
6	Training/Delivery				1
6.1	Conduct training	Craig Gregersen	4/29/22	4/29/22	1
6.2	Course evaluation	Louise Masoff	4/29/22	4/29/22	1
6.3	Close project	Louise Masoff	4/29/22	4/29/22	1

WBS Number	Task Title	Task Owner	Start Date	Due Date	Duration	Pct of Task Complete	Phase One							Phase 2							Phase 3							Phase 4				Phase 5	
							Week 1			Week 2			Week 3			Week 4			Week 5			Week 6			Week 7								
							M	T	W	R	F	M	T	W	R	F	M	T	W	R	F	M	T	W	R	F	M	T	W	R	F	M	T
1	Needs Analysis				6																												
	Stakeholder Conversation Planning	Richard Mull	3/14/22	3/21/22		0%																											
1.1	Schedule Stakeholder Conversation	Louise Masoff	3/14/22	3/17/22	3	0%																											
1.1.1	Stakeholder Meeting	Louise Masoff	3/17/22	3/17/22	1	0%																											
1.1.2	Scope and Goal Setting	Craig Gregersen	3/17/22	3/17/22	1	0%																											
1.1.3	Meeting to review stakeholder conversation	Louise Masoff	3/18/22	3/18/22	1	0%																											
1.2	Budget Setting	Louise Masoff	3/21/22	3/21/22	1	0%																											
1.3	Project Schedule	Louise Masoff	3/21/22	3/21/22	1	0%																											
1.4	Communication Plan	Louise Masoff	3/21/22	3/21/22	1	0%																											
1.5	Contingency time if project needs to be modified and submitted again	Congingency day(cd)	3/22/22	3/22/22	1	0%																											
2	Design and Development				7																												
	Assign Roles	Craig Gregersen	3/23/22	3/23/22	1	0%																											
2.1	Legal	Richard Mull				0%																											
2.1.1	Engineering	Stan Neuhaus				0%																											
2.1.2	Project Manager	Louise Masoff				0%																											
2.1.3	Instructional Designer	Craig Gregersen				0%																											
2.1.4	Project Design	Craig Gregersen				0%																											
2.2	Review pre-existing training	Louise Masoff	3/23/22	3/24/22	2	0%																											
2.2.1	Modify pre-existing Training	Craig Gregersen	3/25/22	3/30/22	4	0%																											
2.2.2	Finalize preliminary training documents	Craig Gregersen	3/31/22	3/31/22	1	0%																											
2.3	Contingency time if project needs to be modified and submitted again	Congingency day(cd)	4/1/22	4/1/22	1	0%																											
2.X	Obtain training documents from each team				0	0%																											
3	Legal Review & Modifications				13																												
	Training approval	Richard Mull				0%																											
3.1	Sumbit to legal dept for approval	Richard Mull	4/4/22	4/4/22	1	0%																											
3.1.1																																	

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Resource Allocation Plan

WBS NUMBER	TASK TITLE	TASK OWNER	DURATION (In days)	DURATION (In hours)	Resource Rate per hour
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1	Needs Analysis		6	\$3,560		
1.1	Stakeholder Conversation Planning	Richard Mull	3	24	\$50	\$1,200
1.1.1	Schedule Stakeholder Conversation	Louise Masoff	3	24	\$25	\$600
1.1.2	Stakeholder Meeting	Louise Masoff	1	8	\$25	\$200
1.1.3	Scope and Goal Setting	Greg Gregerson	1	8	\$20	\$160
1.2	Meeting to review stakeholder conversation	Louise Masoff	1	8	\$25	\$200
1.3	Budget Setting	Louise Masoff	2	16	\$25	\$400
1.4	Project Schedule	Louise Masoff	2	16	\$25	\$400
1.5	Communication Plan	Louise Masoff	2	16	\$25	\$400
2	Design and Development		7	\$1,520		
2.1	Assign Roles	Greg Gregerson	1	8	\$20	\$160
2.1.1	Communicate Roles	Greg Gregerson	1	8	\$20	\$160
2.2	Project Design	Greg Gregerson				
2.2.1	Review pre-existing training	Louise Masoff	2	16	\$25	\$400
2.2.2	Modify pre-existing Training	Greg Gregerson	4	32	\$20	\$640
2.3	Finalize preliminary training documents	Greg Gregerson	1	8	\$20	\$160
3	Legal Review & Modifications		13	\$4,960		
3.1	Training approval	Richard Mull	0	0	\$50	\$0
3.1.1	Submit to legal dept for approval	Richard Mull	1	8	\$50	\$400
3.1.2	Generate report with approval or rejection of submitted training documents and necessary modifications	Richard Mull	5	40	\$50	\$2,000
3.2	Make adjustments based on legal advice	Louise Masoff		0	\$25	\$0

3.2.1	Meet to discuss necessary changes	Greg Gregerson	1	8	\$20	\$160
3.2.2	Set deadline	Greg Gregerson	1	8	\$20	\$160
3.2.3	Make changes	Greg Gregerson	2	16	\$20	\$320
3.3	Finalize Deliverables	Louise Masoff	2	16	\$25	\$400
3.4	Submit to legal again for approval	Richard Mull	3	24	\$50	\$1,200
3.5	Make required modifications	Greg Gregerson	2	16	\$20	\$320
4	Logistics		3	\$200		
4.1	Create logistics team	Louise Masoff	1	8	\$25	\$200
4.2	Sign out technology	Intern #1	3	24	\$15	(see below)
4.3	Reserve training room	Intern #2	3	24	\$15	(see below)
4.4	Secure catering contract	Intern #3	3	24	\$15	(see below)
5	Trainer Preparation		6	\$840		
5.1	Team meeting	Louise Masoff	1	8	\$25	\$200
5.1.1	Create meeting agenda	Intern #2	1	8		(see below)
5.1.2	Reserve training room	Intern #3	1	8		(see below)
5.2	Review of training material	Greg Gregerson	1	8	\$20	\$160
5.3	Cold runthrough of training	Greg Gregerson	1	8	\$20	\$160
5.4	Feedback and adjustments	Greg Gregerson	2	16	\$20	\$320
5.5	Send agenda to all stakeholders	Louise Masoff	0	0	\$20	\$0
6	Training/Delivery		1	\$560		
6.1	Conduct training	Greg Gregerson	1	8	\$20	\$160
6.2	Course evaluation	Louise Masoff	1	8	\$25	\$200

6.3	Close project	Louise Masoff	1	8	\$25	\$200
Auxiliary Costs						\$19,700
	Intern cost (3 interns 8hr/day)		35	8	\$15	\$12,600
	Catering					\$3,500
	Legal Team (3 in addition to Mull)		3	8	\$50	\$3,600
	Print materials					\$200
Total						\$31,540

Rationale Statement

This portion of the project includes various assumptions based on the size of the organization. The Electron Corp is an international technology company with their own computers, projectors, training rooms, and cafeteria. They also employ interns in each department, with three interns working under the product manager. Most of the printing can be done on-site but larger banners will be sent off to the printers. The most significant additional expense will be that of catering the event.

Communication Plan

	Who (Receiver)	What Information?	When? (How often) (check box when complete)	How? (Form)	Who Creates and Publishes?
<input checked="" type="checkbox"/>	Project Team: Louise Masoff, Richard Mull, Stan Neuhaus, Craig Gregerson, Interns	1. Weekly agenda 2. Required deliverables for the week	Weekly: [√] Week 1 – 3/18/22 [√] Week 2 – 3/25/22 [√] Week 3 – 4/01/22 [√] Week 4 – 4/08/22 [] Week 5 – 4/15/22 [] Week 6 – 4/22/22 [] Week 7 – 4/29/22	Meeting or teleconference	Louise Masoff
<input type="checkbox"/>	Legal	[] 1. Weekly recap	Weekly: Recap, progress report	Email	Richard Mull

		<input checked="" type="checkbox"/> 2. Assigned roles <input checked="" type="checkbox"/> 3. Project design <input checked="" type="checkbox"/> 4. Training documents are ready for approval – 3/31/22 <input checked="" type="checkbox"/> 5. Training documents approved	<input checked="" type="checkbox"/> Week 1 – 3/18/22 <input checked="" type="checkbox"/> Week 2 – 3/25/22 <input checked="" type="checkbox"/> Week 3 – 4/01/22 <input checked="" type="checkbox"/> Week 4 – 4/08/22 <input type="checkbox"/> Week 5 – 4/15/22 <input type="checkbox"/> Week 6 – 4/22/22 <input type="checkbox"/> Week 7 – 4/29/22 Once: <input checked="" type="checkbox"/> Roles <input checked="" type="checkbox"/> Project design – 3/31/22 <input type="checkbox"/> Sign-off: Training docs approved		
<input type="checkbox"/>	Engineering	1. Review of stakeholder conversation 2. Project Schedule 3. Date of training	<input type="checkbox"/> Review of stakeholder conversation	Email	Stan Neuhaus
<input checked="" type="checkbox"/>	Craig Gregerson	Deliverable due dates	<input type="checkbox"/> At sign-off	Meeting	Louise Masoff
<input checked="" type="checkbox"/>	Logistics Team	Assigned roles	<input checked="" type="checkbox"/> At sign-off – 3/14/22	Meeting	Louise Masoff
<input type="checkbox"/>	Louise Masoff	1. Acquisition of catering contract 2. Completion of training revisions 3. Approval from legal	<input checked="" type="checkbox"/> 1. Upon acquisition of catering – 3/16/22 <input type="checkbox"/> 2. Weekly updates and upon completion of revisions <input checked="" type="checkbox"/> Week 1 – 3/18/22 <input checked="" type="checkbox"/> Week 2 – 3/25/22 <input checked="" type="checkbox"/> Week 3 – 4/01/22 <input checked="" type="checkbox"/> Week 4 – 4/08/22 <input type="checkbox"/> Week 5 – 4/15/22 <input type="checkbox"/> Week 6 – 4/22/22 <input type="checkbox"/> Week 7 – 4/29/22 <input type="checkbox"/> 3. At sign-off	1. Email 2. Email and meetings 3. Email	1. Intern 3 2. Craig Gregerson 3. Richard Mull
<input type="checkbox"/>	Training Participants	Training Schedule	<input checked="" type="checkbox"/> 1 month prior <input type="checkbox"/> 1 week prior <input type="checkbox"/> 2 days prior <input type="checkbox"/> 1 day prior <input type="checkbox"/> Day of training	Email Text blast Print	Louise Masoff Interns 1,2, and 3

Project Monitoring Matrix

Monitoring Matrix

	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION (In days)	PCT OF TASK COMPLETE	NOTES
1	Needs Analysis				6		
1.1	Stakeholder Conversation Planning	Richard Mull	3/14/22	3/21/22		100%	
1.1.1	Schedule Stakeholder Conversation	Louise Masoff	3/14/22	3/17/22	3	100%	
1.1.2	Stakeholder Meeting	Louise Masoff	3/17/22	3/17/22	1	100%	
1.1.3	Scope and Goal Setting	Craig Gregersen	3/17/22	3/17/22	1	100%	
1.2	Meeting to review stakeholder conversation	Louise Masoff	3/18/22	3/18/22	1	100%	
1.3	Budget Setting	Louise Masoff	3/21/22	3/21/22	1	100%	
1.4	Project Schedule	Louise Masoff	3/21/22	3/21/22	1	100%	
1.5	Communication Plan	Louise Masoff	3/21/22	3/21/22	1	100%	
1.X	<i>Contingency time if project needs to be modified and submitted again</i>	Congingency day(cd)	3/22/22	3/22/22	1		
2	Design and Development				7		
2.1	Assign Roles	Craig Gregersen	3/23/22	3/23/22	1	100%	
2.1.1	Legal	Richard Mull					Task owner is main contact for respective department
2.1.2	Engineering	Stan Neuhaus					Task owner is main contact for respective department
2.1.3	Project Manager	Louise Masoff					Task owner is main contact for respective department
2.1.4	Instructional Designer	Craig Gregersen					Task owner is main contact for respective

							department
2.2	Project Design	Craig Gregersen				100%	
2.2.1	Review pre-existing training	Louise Masoff	3/23/22	3/24/22	2	100%	
2.2.2	Modify pre-existing Training	Craig Gregersen	3/25/22	3/30/22	4	100%	
2.3	Finalize preliminary training documents	Craig Gregersen	3/31/22	3/31/22	1	100%	
2.X	<i>Contingency time if project needs to be modified and submitted again</i>	Congingency day(cd)	4/1/22	4/1/22	1		
2.3.1	Obtain training documents from each team				0	0%	
3	Legal Review & Modifications				13		
3.1	Training approval	Richard Mull				100%	
3.1.1	Submit to legal dept for approval	Richard Mull	4/4/22	4/4/22	1	100%	
3.1.2	Generate report with approval or rejection of submitted training documents and necessary modifications	Richard Mull	4/5/22	4/8/22	5	100%	Training documents approved. No need to resubmit
3.2	Make adjustments based on legal advice	Louise Masoff				N/A	
3.2.1	Meet to discuss necessary changes	Craig Gregersen	4/11/22	4/11/22	1	N/A	
3.2.2	Set deadlines	Craig Gregersen	4/11/22	4/11/22	1	100%	
3.2.3	Make changes	Craig Gregersen	4/12/22	4/13/22	2	N/A	
3.3	Finalize Deliverables	Louise Masoff	4/13/22	4/14/22	2	100%	
3.4	Submit to legal again for approval	Richard Mull	4/14/22	4/18/22	3	N/A	
3.5	Make required modifications	Craig Gregersen	4/19/22	4/20/22	2	N/A	
3.X	<i>Contingency time if project needs to be modified and submitted again</i>	Congingency day(cd)	4/21/22	4/21/22	1		
4	Logistics				3		
4.1	Create logistics team	Louise Masoff	3/14/22	3/14/22	1	100%	
4.2	Sign out technology	Intern #1	3/14/22	3/16/22	3	100%	

4.3	Reserve training room	Intern #2	3/14/2 2	3/16/2 2	3	100%	
4.4	Secure catering contract	Intern #3	3/14/2 2	3/16/2 2	3	100%	
5	Trainer Preparation				6		
5.1	Team meeting	Louise Masoff	4/22/2 2	4/22/2 2	1	0%	
5.1.1	Create meeting agenda	Intern #2	4/21/2 2	4/21/2 2	1	0%	
5.1.2	Reserve training room	Intern #3	4/21/2 2	4/21/2 2	1	0%	
5.2	Review of training material	Craig Gregersen	4/23/2 2	4/23/2 2	1	0%	
5.3	Cold runthrough of training	Craig Gregersen	4/23/2 2	4/23/2 2	1	0%	
5.4	Feedback and adjustments	Craig Gregersen	4/24/2 2	4/25/2 2	2	0%	
5.5	Send agenda to all stakeholders	Louise Masoff	4/19/2 2		0	0%	
6	Training/Delivery				1		
6.1	Conduct training	Craig Gregersen	4/29/2 2	4/29/2 2	1	0%	
6.2	Course evaluation	Louise Masoff	4/29/2 2	4/29/2 2	1	0%	
6.3	Close project	Louise Masoff	4/29/2 2	4/29/2 2	1	0%	

Rationale Statement

This portion of the project includes various assumptions. It is assumed that all department contacts will serve as the lead for that portion of the project. This project also assumes that the modified training documents will be approved by legal on the first attempt.

Project Close-out Checklist

Team Members & Stakeholders	Tasks to Complete √ indications completion of task.
Electron Corporation Legal Department	[] Sign off on all close out documents.

	<input type="checkbox"/> Provide feedback to PM team.
Richard Mull (Legal)	<input type="checkbox"/> Review outcome with legal to determine project success
Stan Neuhaus (Engineering)	<input type="checkbox"/> Track data to determine if training was successful.
Louise Masoff (PM)	<input checked="" type="checkbox"/> Hold meeting to discuss training. <input type="checkbox"/> Complete "post-mortem" review with team.
Craig Gregerson (ID)	<input type="checkbox"/> Create a list of lessons learned.
Intern 1	<input checked="" type="checkbox"/> Inventory and return technology
Intern 2	<input checked="" type="checkbox"/> Reset training rooms used
Intern 3	<input checked="" type="checkbox"/> Follow up with catering company to verify payment and wrap up contract.
Training Participants	<input checked="" type="checkbox"/> Course Evaluation Survey

References

- Ertmer, P. A., Quinn, J. A. , & Glazewski, K. D. (eds). (2019). *The ID casebook: Case studies in instructional design (5th ed.)*. Pearson Education. Case Study 21: Craig Gregersen:
Balancing a Range of Stakeholder Interests when Designing Instruction
- Greer, M., (2010). *The project management minimalist: Just enough PM to rock your projects!*.
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