STATEMENT OF WORK
DESIGNING AN ELECTRONIC PERFORMANCE SUPPORT SYSTEM FOR WIDGETMART

BY: TY CARRIERE

RATIONALE

The Case Study (CS) I chose is: CS 26 – Davey Jones: Designing an Electronic Performance Support System (EPSS).

Through the years, WidgetMart has grown from 1 store in 1971 to over 5000 stores currently. In the past 2 decades, its growth exploded and like most companies, they weren't prepared for that level of expansion in that short of a time. Their training, resources, customer training procedures and materials stayed the same as when they were small and became quickly inefficient. To combat this problem, the company has chosen to transition to a EPSS and needs to transfer, update and when necessary, get rid of old materials that the company uses to train its employees.

The challenges are going to be unifying all the stores to a consistent standard, consistent training materials, and supply access to all the employees of all the stores in an online format. The biggest challenges will be organizing the mass amounts of information and getting undocumented training information from the SME's to create the content.

INTRODUCTION

This document authorizes Carriere Instructional Design (CID) to develop a unified Online solution for the new EPSS (**E**lectronic, **P**erformance, **S**upport, **S**ystem) for WidgetMart. A project plan will be will be submitted for the approval of WidgetMart for WidgetMart, Universal Widgets and BuyMore. The project plan will include: Project Scope and work breakdown structure (WBS), Project Schedule, Resource Allocation Plan (Time, Resources, Expertise, Quality and the Scope).

PURPOSE

The purpose of this project is to unify the information and training for WidgetMart and its sister stores: Universal Widgets and BuyMore. This project will standardize inconsistencies in procedures, employee knowledge, customer support from employees, and update or get rid of outdated materials across all of the companies stores. The project will create an Online Performance Support System that includes:

1. Applications with embedded knowledge
2. A reference Function
3. A job aid function
4. And a Computer – based Instruction Function

Once completed, employees will get consistent training from anywhere with mobile access, have an organized and quick way to find information and get support for their job and customers from a shared source that when updated will update to all who access it instantly.

ACCEPTANCE CRITERIA

When the given project tasks approved, the acceptable criteria for each task must be tested to verify whether or not the task is done and is effective.

Tasks	Given	When	Then
1. Applications with embedded knowledge	We create software applications for computer-mediated tasks in which data, best practices, and business rules would be embedded, negating the need to learn or even review the knowledge.	the use of an inventory finder with embedded suggestions for cross-selling would support customer satisfaction and has effectively cataloged the information and stats. The employee would be able to access this information pulling a report.	Task 1 can be successfully checked off as completed.
2. A reference Function	We create a repository of knowledge, which could be accessed whenever needed by the employees and employers through a mobile device to access information.	A manager can determine how many days off had been provided to an associate whose grandfather had died, he or she would be able to access this information by pulling up the employee's name.	Task 2 can be successfully checked off as completed.
3. A job aid function	a database of records and documents, which would be accessed on handheld devices to support performance away from the computer.	the rack allocation guidelines would dynamically generate the optimal display guidelines and outline the process for changing the racks for new associates. New associates would be able to access display guidelines and effectively follow them.	Task 3 can be successfully checked off as completed.
4. A computer – based Instruction Function	structured information and guidelines designed to help associates internalize the information.	when an irate customer walks in the door, the associate reacts properly in the absence of any external support following trained procedures. New and current associates eject a difficult secret shopper from the store following procedures.	Task 4 can be successfully checked off as completed.

PERIOD OF PERFORMANCE

The period of performance of the project is 1 year. This is primarily based off of gathering data from over 5000 stores and organizing them. Not all the data will be used. Some will get deleted or put into deprecated archive. Before the data can be gathered there has to be criteria for the data to minimize unimportant information and to make it easier to chunk in the cloud for access through the database. Top performing SMEs will meet to determine the most important criteria for the information gathered and help with the hierarchal structure of organizing the data. The construction of the EPSS will only take 2 months working with SME's. Data collection and input will be an ongoing thing but training and access will happen after 2 months. The next 3 months will be ADDIE. Since the implementation is international, it will take 5 month to fully implement and evaluate.

REQUIRED MANPOWER

It will be important to have a team to delegate parts of this process to, each familiar with the company and strong in their own position and experience. The team will comprise of:

Davey Jones – ID / Assist. Project Mgr.

Ty Carriere - Project manager / ID

Ellen Tyson – Merchandising, Design Business applications, Administrative

Josie Bednarski - Acquisition team, designer for training systems

Tim Hosch – Translation Expert

Barry Murphy – Management development, personal interpersonal skills

REFERENCES

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WORK BREAKDOWN STRUCTURE

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The challenges are going to be unifying all the stores to a consistent standard, consistent training materials, and supply access to all the employees of all the stores in an online format. The biggest challenges will be organizing the mass amounts of information and getting undocumented training information from the SME's to create the content.

INTRODUCTION

This is the Work Breakdown Structure (WBS) and Responsibility Assignment Matrix (RACI) for the WidgetMart Project. Some modifications have been made and a new Deliverable was added. The new deliverable is a Digital Ops and Training Manual. All previous data for this manual was originally in print, hand written format and even passed to the trainees face to face. As a result, different practices started occurring within the company and consistency started to fail. Furthermore, new employees learned procedures but because of information degradation, couldn't understand why the procedures were in place and it became a behavioral training rather than a training that had a deeper understanding. This online Ops and Training manual conversion will help to unify all the stores in the company and any updates (once approved) will be instantaneous.

PURPOSE

The purpose of this project is to unify the information and training for WidgetMart and its sister stores: Universal Widgets and BuyMore. This project will standardize inconsistencies in procedures, employee knowledge, customer support from employees, and update or get rid of outdated materials across all of the companies stores. The project will create an Online Performance Support System that includes:

1. Applications with embedded knowledge
2. A reference Function
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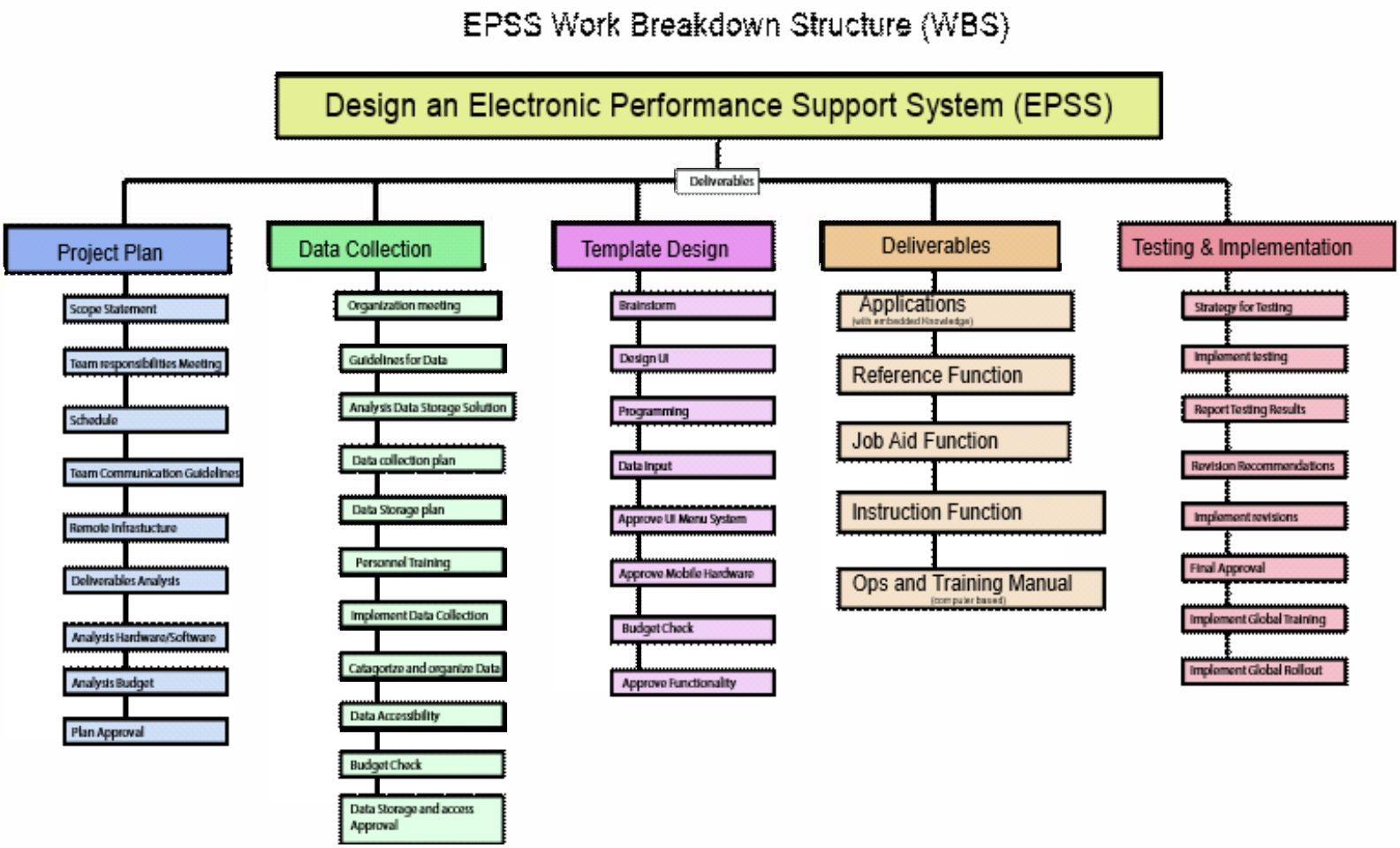
4. Computer – based Instruction Function
5. * Ops and Training Manual Online (Computer or Mobile Based)

**Added to the EPSS*

Once completed, employees will get consistent training from anywhere with mobile access, have an organized and quick way to find information and get support for their job and customers from a shared source that when updated will update to all who access it instantly.



The EPSS design is laid out with the main Phases on top and the deliverables in Orange. The project plan leads to the Data Collection which is one of the most important parts of this project because of the mass amounts of data that need to be organized. Once the data is organized in a cloud based storage system, it can start to be implemented into the design of the application which has a consistent UI which will be easier for training and usage.

RACI Chart with Assignments

	Roles	Davey Jones	Ty Carriere	Ellen Tyson	Josie Bednarski	Tim Hosch	Barry Murphy
	Tasks						
1	**Applications**						
	Brainstorm	A, I	C, R	C	C	C, R	C, R
	Information	A, R	I	R	C	C, R	C
	Software	A	C, R	C, R	A, R	C, R	C
	Design UI	C, I	C	C	A, R	C, R	C
	Sample	A, I	C	C	C	C, R	C
	Test	A, I	C	R	C	C, R	R
	Implement	A, I	R	C	C	C, R	C
2	**Reference Function**						
	Database	A, R	I	R	C	C	C
	Hardware Test	A	C	C	A, R	C	C
	Design UI	C, I	C	C	A, R	C	C
	Programming	C	C	A, R	C	I	I
	Data Entry	A	C	R	R	R	R
	Test Function	A	C	R	C	C	C
	Approve Functionality	A, R	R, C	C	C	C	C
3	**Job Aid Function**						
	Database	A, R	I	R	C	C	C
	Mobile Hardware	A	C	C	A, R	C	C
	Design UI	C, I	C	C	A, R	C	C
	Programming	C	C	A, R	C	I	I
	Input Data	A	C	R	R	R	R
	Test Function	A	C	R	C	C	C
	Approve Functionality	A, R	R, C	C	C	C	C
4	**Instruction Function**						
	Structured Information	A,R	R	C	C	C, R	R
	Guidelines	A,C	C	C, I	C, I	C, I	R
	Personal Training	A,	C	C, I	C, I	C, I	R
	Input Data	A	C	R	R	R	R
	Test Functionality	A	C	R	C	C	C
	Approve Functionality	A, R	R, C	C	C	C	C
5	**Ops and Training Manual**						
	Information Collection	A, R	I	R	C	C	C
	Digital Conversion	A	R	I	I	I	I
	Design UI	C	C	C	A, R	C	C

	Menu System	**C, R**	**C, R**	**I**	**A, R**	**C**	**I**
	Data Entry	**A**	**C**	**R**	**C**	**C**	**C**
	Approve Manual	**A,R**	**R**	**C**	**C**	**C**	**C**

RACI Chart Legend:

R= Responsible

A= Accountable

C= Consulted

I= Informed

REQUIRED MANPOWER

Team Assignments and Skills

***Davey Jones** – **Project manager / ID** – Technical Writer, documenting procedures, store operations and personnel expert, ID, stand-up trainer, procedures and interpersonal skills – Approvals, Information specialist (SME) for the project and has been overseeing the project,

***Ty Carriere** - **ID / Assist. Project Mgr.** – Instructional Design, assisting the PM, support with the team, Creates ID plan, oversees consistency with all departments.

** Slight change in ID/PM delegation. Davey Jones who has proven an incredible asset to the company and the project will be lead PM with Ty Carriere as the ID and assist PM.*

Ellen Tyson – Merchandising, Design Business applications, Administrative – Programming, Information, Data Input, Marketing assets

Josie Bednarski - Acquisition team, designer for training systems – Designs UI, Design Tests, Design Evaluations

Tim Hosch – Translation Expert – Consults proper language usage and creates and modified information

Barry Murphy – Management development, personal interpersonal skills – Consults with team on development content and acts as a diplomat to different resources such as the helping communicate with other stores.

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PROJECT SCHEDULE & RESOURCE ALLOCATION PLAN

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INTRODUCTION

This is the Project Schedule and Resource Allocation Plan for WidgetMart. This lays out the tasks and subtasks that need to be completed within the 6 month period as defined. The project itself will continue to grow and be constantly updated after its completion as new information will be added from each store. The project schedule is broken into Phases each with subtasks to complete the framework and transition to an online resource solution. Additional personal was added for data entry and assistance with programming as not to spread the key team too thin.

PURPOSE

The purpose of this project is to unify the information and training for WidgetMart and its sister stores: Universal Widgets and BuyMore. This project will standardize inconsistencies in procedures, employee knowledge, customer support from employees, and update or get rid of outdated materials across all of the companies stores. The project will create an Online Performance Support System that includes:

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5. * Ops and Training Manual Online (Computer or Mobile Based)

**Added to the EPSS*

Once completed, employees will get consistent training from anywhere with mobile access, have an organized and quick way to find information and get support for their job and customers from a shared source that when updated will update to all who access it instantly.

To achieve these outcomes a description of the Phases are as follows:

Phase 1- Project plan

This portion of the plan is heavy in scheduling and meetings to define the allocation of resources and timelines of all the tasks for the next 6 months of the project to its completion and evaluation. Team members are given their duties and responsibilities and can give their input as well as ask questions.

Phase 2 – Data Collection

This portion of the project is focused the procedure, collection, organization and archiving data from all of the various stores. Once the method and guidelines are in place, data will begin to be submitted from all sources into a cloud storage system to be used in the functions.

Phase 3- Template Design

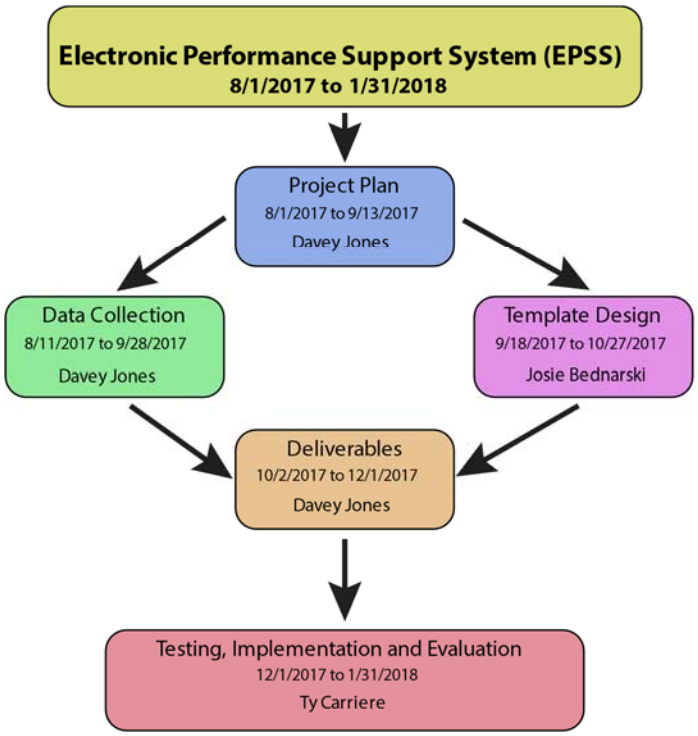
This portion of the project focuses on the design, programming and functionality of a UI for the data and functions to be used by the company. It is vitally important that the data from phase 2 are archived and organized properly to be seamlessly integrated into the UI and tested on multiple mobile platforms.

Phase 4 – Deliverables

This portion focuses on the programming and integration of the applications and functions which are accessible through the designed UI. This is the final compilation of data, design, application and hardware ready to be distributed for limited testing to certain stores in different regions.

Phase – 5 Testing, Implementation and Evaluation

This portion of the project focuses on implementing the deliverables for a beta test to designated stores, reporting and bugs or difficulties as well as parts that are working particularly well, evaluating the findings and making any necessary revisions for final approval and global training and implementation.



Each Phase of the EPSS has a Primary person accountable for its completion and each sub-tasks has a team member responsible for its completion that can be seen in the WBS and RACI Chart.

The Primary people accountable for the Phase are listed here.

Tasks - EPSS

on 07 August 2017 EDT

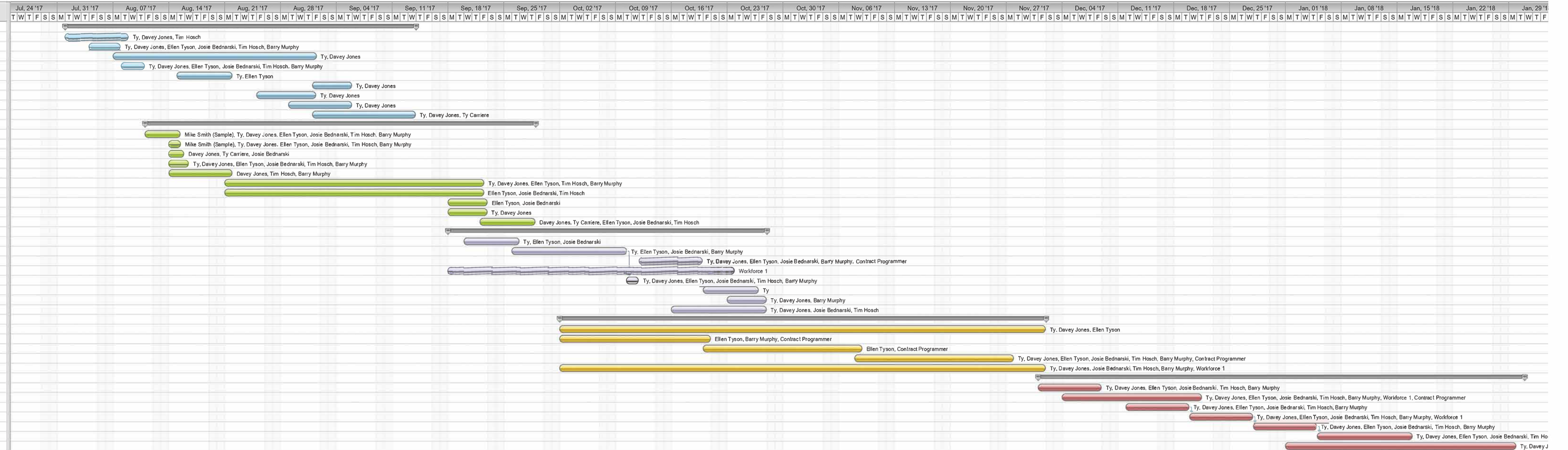
EPSS

WBS	Task Name	Project Name	Planned Start Date	Planned Finish Date	Planned Duration	Planned Effort	Planned Cost	Planned Resource Cost	Percent Complete	Assigned To	Actual Start Date
1	**1. Project Plan**	**EPSS**	**8/1/2017**	**9/13/2017**	**32 days**	**234.5 hours**	**$0.00**	**$9,875.00**	**0**		
1.1	Scope Statement	EPSS	8/1/2017	8/8/2017	6 days	70 hours	$0.00	$2,950.00	0	Ty [28.57%] Davey Jones [28.57%] Tim Hosch [42.86%]	
1.2	Team Responsibilities Meeting	EPSS	8/4/2017	8/7/2017	2 days	58 hours	$0.00	$2,230.00	0	Ty [13.79%] Davey Jones [13.79%] Ellen Tyson [13.79%] Josie Bednarski [13.79%] Tim Hosch [31.03%] Barry Murphy [13.79%]	
1.3	Schedule	EPSS	8/7/2017	9/1/2017	19.5 days	16 hours	$0.00	$760.00	0	Ty [50%] Davey Jones [50%]	
1.4	Team Communication Guidelines	EPSS	8/8/2017	8/10/2017	3 days	2.5 hours	$0.00	$95.00	0	Ty [0%] Davey Jones [20%] Ellen Tyson [20%] Josie Bednarski [20%] Tim Hosch [20%] Barry Murphy [20%]	
1.5	Remote Infrastucture	EPSS	8/15/2017	8/21/2017	5 days	16 hours	$0.00	$600.00	0	Ty [25%] Ellen Tyson [75%]	
1.6	Deliverables Analysis	EPSS	9/1/2017	9/5/2017	3 days	16 hours	$0.00	$760.00	0	Ty [50%] Davey Jones [50%]	
1.7	Hardware/Software Analysis	EPSS	8/25/2017	9/1/2017	5.5 days	32 hours	$0.00	$1,520.00	0	Ty [50%] Davey Jones [50%]	
1.8	Analysis Budget	EPSS	8/29/2017	9/5/2017	6 days	16 hours	$0.00	$760.00	0	Ty [50%] Davey Jones [50%]	
1.9	Plan Approval	EPSS	9/1/2017	9/13/2017	9 days	8 hours	$0.00	$200.00	0	Ty [0%] Davey Jones [50%] Ty Carriere [50%]	
2	**2. Data Collection**	**EPSS**	**8/11/2017**	**9/28/2017**	**35 days**	**382 hours**	**$0.00**	**$14,020.00**	**0**		
2.1	Organization Meeting	EPSS	8/11/2017	8/15/2017	2.5 days	7 hours	$0.00	$325.00	0	Mike Smith (Sample) [14.29%] Ty [14.29%] Davey Jones [14.29%] Ellen Tyson [14.29%] Josie Bednarski [14.29%] Tim Hosch [14.29%] Barry Murphy [14.29%]	
2.2	Guidelines for Data	EPSS	8/14/2017	8/15/2017	1.5 days	7 hours	$0.00	$325.00	0	Mike Smith (Sample) [14.29%] Ty [14.29%] Davey Jones [14.29%] Ellen Tyson [14.29%] Josie Bednarski [14.29%] Tim Hosch [14.29%] Barry Murphy [14.29%]	
2.3	Analysis Data Storage Solution	EPSS	8/14/2017	8/15/2017	2 days	20 hours	$0.00	$480.00	0	Davey Jones [20%] Ty Carriere [40%] Josie Bednarski [40%]	
2.4	Data Collection Plan	EPSS	8/14/2017	8/16/2017	2.5 days	18 hours	$0.00	$730.00	0	Ty [22.22%] Davey Jones [22.22%] Ellen Tyson [22.22%] Josie Bednarski [11.11%] Tim Hosch [11.11%] Barry Murphy [11.11%]	
2.5	Personnel Training	EPSS	8/14/2017	8/21/2017	6 days	24 hours	$0.00	$900.00	0	Davey Jones [16.67%] Tim Hosch [16.67%] Barry Murphy [66.67%]	
2.6	Implement Data Collection	EPSS	8/21/2017	9/22/2017	24.5 days	148 hours	$0.00	$5,720.00	0	Ty [32.43%] Davey Jones [2.7%] Ellen Tyson [32.43%] Tim Hosch [16.22%] Barry Murphy [16.22%]	
2.7	Categorize and Organize Data	EPSS	8/21/2017	9/22/2017	24.5 days	120 hours	$0.00	$4,200.00	0	Ellen Tyson [40%] Josie Bednarski [40%] Tim Hosch [20%]	
2.8	Data Accessibility	EPSS	9/18/2017	9/22/2017	5 days	24 hours	$0.00	$840.00	0	Ellen Tyson [66.67%] Josie Bednarski [33.33%]	
2.9	Budget Check	EPSS	9/18/2017	9/22/2017	5 days	4 hours	$0.00	$190.00	0	Ty [50%] Davey Jones [50%]	
2.10	Data Storage and Access Approval	EPSS	9/22/2017	9/28/2017	5 days	10 hours	$0.00	$310.00	0	Davey Jones [20%] Ty Carriere [20%] Ellen Tyson [20%] Josie Bednarski [20%] Tim Hosch [20%]	
3	**3. Template Design**	**EPSS**	**9/18/2017**	**10/27/2017**	**30 days**	**523 hours**	**$0.00**	**$15,935.00**	**0**		
3.1	Brainstorm	EPSS	9/20/2017	9/26/2017	5 days	28 hours	$0.00	$1,020.00	0	Ty [14.29%] Ellen Tyson [14.29%] Josie Bednarski [71.43%]	
3.2	Design UI	EPSS	9/26/2017	10/10/2017	10.5 days	57 hours	$0.00	$2,145.00	0	Ty [26.32%] Ellen Tyson [17.54%] Josie Bednarski [42.11%] Barry Murphy [14.04%]	
3.3	Programming	EPSS	10/12/2017	10/19/2017	6 days	86 hours	$0.00	$2,830.00	0	Ty [2.33%] Davey Jones [9.3%] Ellen Tyson [29.07%] Josie Bednarski [4.65%] Barry Murphy [17.44%] Contract Programmer [37.21%]	
3.4	Data Input	EPSS	9/18/2017	10/23/2017	26 days	208 hours	$0.00	$4,160.00	0	Workforce 1	
3.5	Approve UI Menu System	EPSS	10/10/2017	10/11/2017	1.5 days	12 hours	$0.00	$470.00	0	Ty [16.67%] Davey Jones [16.67%] Ellen Tyson [16.67%] Josie Bednarski [16.67%] Tim Hosch [16.67%] Barry Murphy [16.67%]	
3.6	Approve Mobile Hardware	EPSS	10/20/2017	10/26/2017	5 days	4 hours	$0.00	$180.00	0	Ty	
3.7	Budget Check	EPSS	10/23/2017	10/27/2017	5 days	48 hours	$0.00	$2,080.00	0	Ty [33.33%] Davey Jones [33.33%] Barry Murphy [33.33%]	
3.8	Approve Functionality	EPSS	10/16/2017	10/27/2017	10 days	80 hours	$0.00	$3,050.00	0	Ty [12.5%] Davey Jones [12.5%] Josie Bednarski [25%] Tim Hosch [50%]	
4	**4. Deliverables**	**EPSS**	**10/2/2017**	**12/1/2017**	**45 days**	**1441 hours**	**$0.00**	**$50,985.00**	**0**		
4.1	Applications (with embedded Knowledge)	EPSS	10/2/2017	12/1/2017	45 days	280 hours	$0.00	$11,800.00	0	Ty [28.57%] Davey Jones [28.57%] Ellen Tyson [42.86%]	
4.2	Reference Function	EPSS	10/2/2017	10/20/2017	15 days	145 hours	$0.00	$4,675.00	0	Ellen Tyson [55.17%] Barry Murphy [17.24%] Contract Programmer [27.59%]	
4.3	Job Aid Function	EPSS	10/20/2017	11/8/2017	14 days	100 hours	$0.00	$3,250.00	0	Ellen Tyson [75%] Contract Programmer [25%]	

WBS	Task Name	Project Name	Planned Start Date	Planned Finish Date	Planned Duration	Planned Effort	Planned Cost	Planned Resource Cost	Percent Complete	Assigned To	Actual Start Date
4.4	Instruction Function	EPSS	11/8/2017	11/27/2017	14 days	261 hours	$0.00	$9,185.00	0	Ty [3.07%] Davey Jones [3.07%] Ellen Tyson [28.74%] Josie Bednarski [13.41%] Tim Hosch [28.74%] Barry Murphy [17.24%] Contract Programmer [5.75%]	
4.5	Ops and Training Manual (Computer Accessible)	EPSS	10/2/2017	12/1/2017	45 days	655 hours	$0.00	$22,075.00	0	Ty [12.21%] Davey Jones [13.74%] Josie Bednarski [22.9%] Tim Hosch [12.21%] Barry Murphy [8.4%] Workforce 1 [30.53%]	
5	**5. Testing & Implementation**	**EPSS**	**12/1/2017**	**1/30/2018**	**43 days**	**2141 hours**	**$0.00**	**$77,490.00**	**0**		
5.1	Strategy for Testing	EPSS	12/1/2017	12/8/2017	6 days	107 hours	$0.00	$4,025.00	0	Ty [14.95%] Davey Jones [7.48%] Ellen Tyson [23.36%] Josie Bednarski [23.36%] Tim Hosch [23.36%] Barry Murphy [7.48%]	
5.2	Implement Testing	EPSS	12/4/2017	12/21/2017	13.5 days	313 hours	$0.00	$10,170.00	0	Ty [7.67%] Davey Jones [4.79%] Ellen Tyson [7.67%] Josie Bednarski [15.97%] Tim Hosch [15.97%] Barry Murphy [15.97%] Workforce 1 [15.97%] Contract Programmer [15.97%]	
5.3	Report Testing Results	EPSS	12/12/2017	12/19/2017	6 days	165 hours	$0.00	$6,295.00	0	Ty [9.7%] Davey Jones [14.55%] Ellen Tyson [12.73%] Josie Bednarski [19.39%] Tim Hosch [29.09%] Barry Murphy [14.55%]	
5.4	Revision Recommendations	EPSS	12/20/2017	12/27/2017	6 days	328 hours	$0.00	$10,360.00	0	Ty [12.2%] Davey Jones [12.2%] Ellen Tyson [12.2%] Josie Bednarski [12.2%] Tim Hosch [12.2%] Barry Murphy [12.2%] Workforce 1 [14.63%]	
5.5	Implement Revisions	EPSS	12/28/2017	1/4/2018	6 days	288 hours	$0.00	$11,280.00	0	Ty [16.67%] Davey Jones [16.67%] Ellen Tyson [16.67%] Josie Bednarski [16.67%] Tim Hosch [16.67%] Barry Murphy [16.67%]	
5.6	Final Approval	EPSS	1/5/2018	1/16/2018	8 days	384 hours	$0.00	$15,040.00	0	Ty [16.67%] Davey Jones [16.67%] Ellen Tyson [16.67%] Josie Bednarski [16.67%] Tim Hosch [16.67%] Barry Murphy [16.67%]	
5.7	Implement Global Training	EPSS	1/1/2018	1/29/2018	21 days	500 hours	$0.00	$18,280.00	0	Ty [14.4%] Davey Jones [14.4%] Ellen Tyson [14.4%] Josie Bednarski [14.4%] Tim Hosch [14.4%] Barry Murphy [14.4%] Workforce 1 [13.6%]	
5.8	Implement Global Rollout	EPSS	1/30/2018	1/30/2018	1 day	56 hours	$0.00	$2,040.00	0	Ty [14.29%] Davey Jones [14.29%] Ellen Tyson [14.29%] Josie Bednarski [14.29%] Tim Hosch [14.29%] Barry Murphy [14.29%] Workforce 1 [14.29%]	

EPSS - 07 Aug 2017

	Task Name	Planned Start Date	Planned Finish Date	Planned Duration	Planned Effort	Planned Cost	Planned Resource Cost	Assigned	Complete
1	1. Project Plan	8/1/2017	9/13/2017	32 days	234.5 hours		$9,875.00		
2	Scope Statement	8/1/2017	8/8/2017	6 days	70 hours		$2,950.00	Ty, Davey Jones, Tim Hosch	
3	Team Responsibilities Meeting	8/4/2017	8/7/2017	2 days	58 hours		$2,230.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
4	Schedule	8/7/2017	9/1/2017	19.5 days	16 hours		$760.00	Ty, Davey Jones	
5	Team Communication Guidelines	8/8/2017	8/10/2017	3 days	2.5 hours		$95.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
6	Remote Infrastucture	8/15/2017	8/21/2017	5 days	16 hours		$600.00	Ty, Ellen Tyson	
7	Deliverables Analysis	9/1/2017	9/5/2017	3 days	16 hours		$760.00	Ty, Davey Jones	
8	Hardware/Software Analysis	8/25/2017	9/1/2017	5.5 days	32 hours		$1,520.00	Ty, Davey Jones	
9	Analysis Budget	8/29/2017	9/5/2017	6 days	16 hours		$760.00	Ty, Davey Jones	
10	Plan Approval	9/1/2017	9/13/2017	9 days	8 hours		$200.00	Ty, Davey Jones, Ty Carriere	
11	2. Data Collection	8/11/2017	9/28/2017	35 days	382 hours		$14,020.00		
12	Organization Meeting	8/11/2017	8/15/2017	2.5 days	7 hours		$325.00	Mike Smith (Sample), Ty, Davey Jones, Ellen Tys...	
13	Guidelines for Data	8/14/2017	8/15/2017	1.5 days	7 hours		$325.00	Mike Smith (Sample), Ty, Davey Jones, Ellen Tys...	
14	Analysis Data Storage Solution	8/14/2017	8/15/2017	2 days	20 hours		$480.00	Davey Jones, Ty Carriere, Josie Bednarski	
15	Data Collection Plan	8/14/2017	8/16/2017	2.5 days	18 hours		$730.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
16	Personnel Training	8/14/2017	8/21/2017	6 days	24 hours		$900.00	Davey Jones, Tim Hosch, Barry Murphy	
17	Implement Data Collection	8/2/2017	9/22/2017	24.5 days	148 hours		$5,720.00	Ty, Davey Jones, Ellen Tyson, Tim Hosch, Barry...	
18	Categorize and Organize Data	8/21/2017	9/22/2017	24.5 days	120 hours		$4,200.00	Ellen Tyson, Josie Bednarski, Tim Hosch	
19	Data Accessibility	9/18/2017	9/22/2017	5 days	24 hours		$840.00	Ellen Tyson, Josie Bednarski	
20	Budget Check	9/18/2017	9/22/2017	5 days	4 hours		$190.00	Ty, Davey Jones	
21	Data Storage and Access Approval	9/22/2017	9/26/2017	5 days	10 hours		$310.00	Davey Jones, Ty Carriere, Ellen Tyson, Josie Bed...	
22	3. Template Design	9/18/2017	10/27/2017	30 days	523 hours		$15,535.00		
23	Brainstorm	9/20/2017	9/26/2017	5 days	28 hours		$1,020.00	Ty, Ellen Tyson, Josie Bednarski	
24	Design UI	9/26/2017	10/10/2017	10.5 days	57 hours		$2,145.00	Ty, Ellen Tyson, Josie Bednarski, Barry Murphy	
25	Programming	10/12/2017	10/19/2017	6 days	86 hours		$2,830.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
26	Data Input	9/18/2017	10/23/2017	26 days	208 hours		$4,160.00	Workforce 1	
27	Approve UI Menu System	10/10/2017	10/11/2017	1.5 days	12 hours		$470.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
28	Approve Mobile Hardware	10/20/2017	10/26/2017	5 days	4 hours		$180.00	Ty	
29	Budget Check	10/23/2017	10/27/2017	5 days	48 hours		$2,080.00	Ty, Davey Jones, Barry Murphy	
30	Approve Functionality	10/16/2017	10/27/2017	10 days	80 hours		$3,050.00	Ty, Davey Jones, Josie Bednarski, Tim Hosch	
31	4. Deliverables	10/2/2017	12/1/2017	45 days	1441 hours		$50,985.00		
32	Applications (with embedded Knowledge)	10/2/2017	12/1/2017	45 days	280 hours		$11,800.00	Ty, Davey Jones, Ellen Tyson	
33	Reference Function	10/2/2017	10/20/2017	15 days	145 hours		$4,675.00	Ellen Tyson, Barry Murphy, Contract Programmer	
34	Job Aid Function	10/20/2017	11/8/2017	14 days	100 hours		$3,250.00	Ellen Tyson, Contract Programmer	
35	Instruction Function	11/8/2017	11/27/2017	14 days	261 hours		$9,185.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
36	Ops and Training Manual (Computer Accessible)	10/2/2017	12/1/2017	45 days	655 hours		$22,075.00	Ty, Davey Jones, Josie Bednarski, Tim Hosch, Ba...	
37	5. Testing & Implementation	12/1/2017	1/30/2018	43 days	2141 hours		$77,490.00		
38	Strategy for Testing	12/1/2017	12/8/2017	6 days	107 hours		$4,025.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
39	Implement Testing	12/4/2017	12/21/2017	13.5 days	313 hours		$10,170.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
40	Report Testing Results	12/19/2017	12/21/2017	6 days	165 hours		$6,255.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
41	Revision Recommendations	12/20/2017	12/27/2017	6 days	328 hours		$10,360.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
42	Implement Revisions	12/28/2017	1/4/2018	6 days	288 hours		$11,280.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
43	Final Approval	1/16/2018	1/18/2018	8 days	384 hours		$15,040.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
44	Implement Global Training	1/1/2018	1/29/2018	21 days	500 hours		$18,280.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	
45	Implement Global Rollout	1/30/2018	1/30/2018	1 day	56 hours		$2,040.00	Ty, Davey Jones, Ellen Tyson, Josie Bednarski, ...	



Resources Primary Employees

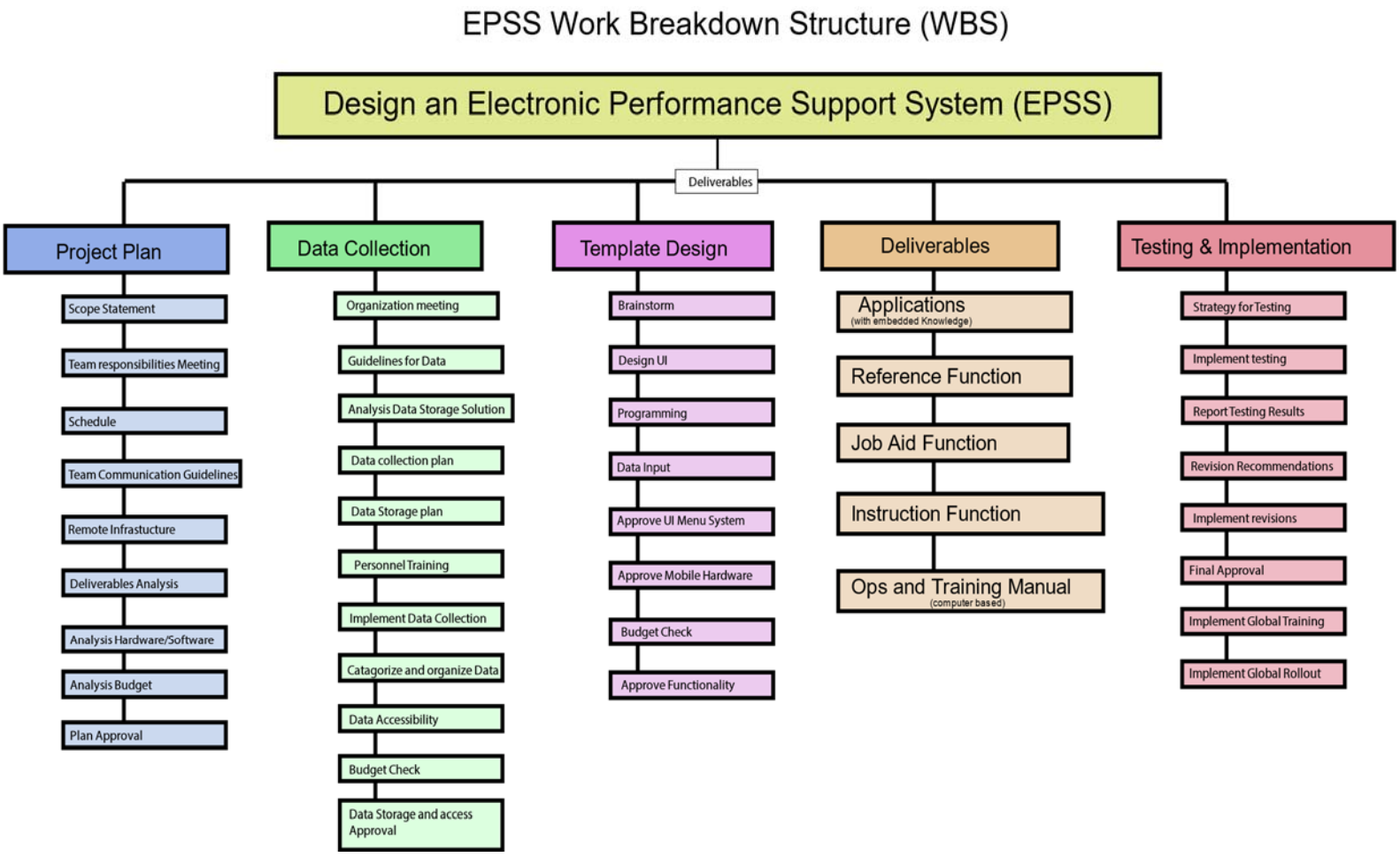
		Davey	Ty	Ellen	Josie	Tim	Barry	Workforce1	Jr. Programmer	Monthly totals
	no of days	$50.00	$45.00	$35.00	$35.00	$35.00	$35.00	$20.00	$25.00	
August	23	$9,200.00	$8,280.00	$6,440.00	$6,440.00	$6,440.00	$6,440.00	$3,680.00	$4,600.00	$51,520.00
September	21	$8,400.00	$7,560.00	$5,880.00	$5,880.00	$5,880.00	$5,880.00	$3,360.00	$4,200.00	$47,040.00
October	22	$8,800.00	$7,920.00	$6,160.00	$6,160.00	$6,160.00	$6,160.00	$3,520.00	$4,400.00	$49,280.00
November	20	$8,000.00	$7,200.00	$7,200.00	$5,600.00	$5,600.00	$5,600.00	$3,200.00	$4,000.00	$46,400.00
December	18	$7,200.00	$6,480.00	$5,040.00	$5,040.00	$5,040.00	$5,040.00	$2,880.00	$3,600.00	$40,320.00
January	22	$8,800.00	$7,920.00	$6,160.00	$6,160.00	$6,160.00	$6,160.00	$3,520.00	$4,400.00	$49,280.00
Employee cost		$50,400.00	$45,360.00	$36,880.00	$35,280.00	$35,280.00	$35,280.00	$20,160.00	$25,200.00	= $283,840.00

Resources Hardware

Mobile Hardware	$5,000.00	
Stock images for design	$2,000.00	
Computers	$15,000.00	
Creation of Online training	$5,000.00	this should include language translation to other countries

Data Storage

Corporate Web Service with data storage	$2,400.00	1st 6 months



The EPSS design is laid out with the main Phases on top and the deliverables in Orange. The project plan leads to the Data Collection which is one of the most important parts of this project because of the mass amounts of data that need to be organized. Once the data is organized in a cloud based storage system, it can start to be implemented into the design of the application which has a consistent UI which will be easier for training and usage.

RACI Chart with Assignments

(Teardown of the Subtasks of Deliverables)

	Roles	Davey Jones	Ty Carriere	Ellen Tyson	Josie Bednarski	Tim Hosch	Barry Murphy
	Tasks						
1	**Applications**						
	Brainstorm	A, I	C, R	C	C	C, R	C, R
	Information	A, R	I	R	C	C, R	C
	Software	C	C, R	C, R	A, R	C, R	C
	Design UI	C, I	C	C	A, R	C, R	C
	Sample	A, I	C	C	C	C, R	C
	Test	A, I	C	R	C	C, R	R
	Implement	A, I	R	C	C	C, R	C
2	**Reference Function**						
	Database	A, R	I	R	C	C	C
	Hardware Test	C	C	C	A, R	C	C
	Design UI	C, I	C	C	A, R	C	C
	Programming	C	C	A, R	C	I	I
	Data Entry	A	C	R	R	R	R
	Test Function	A	C	R	C	C	C
	Approve Functionality	A, R	R, C	C	C	C	C
3	**Job Aid Function**						
	Database	A, R	I	R	C	C	C
	Mobile Hardware	C	C	C	A, R	C	C
	Design UI	C, I	C	C	A, R	C	C
	Programming	C	C	A, R	C	I	I
	Input Data	A	C	R	R	R	R
	Test Function	A	C	R	C	C	C
	Approve Functionality	A, R	R, C	C	C	C	C
4	**Instruction Function**						
	Structured Information	A,R	R	C	C	C, R	R
	Guidelines	A,C	C	C, I	C, I	C, I	R
	Personal Training	A,	C	C, I	C, I	C, I	R

	Input Data	**A**	**C**	**R**	**R**	**R**	**R**
	Test Functionality	**A**	**C**	**R**	**C**	**C**	**C**
	Approve Functionality	**A, R**	**R, C**	**C**	**C**	**C**	**C**
5	**Ops and Training Manual**						
	Information Collection	**A, R**	**I**	**R**	**C**	**C**	**C**
	Digital Conversion	**A**	**R**	**I**	**I**	**I**	**I**
	Design UI	**C**	**C**	**C**	**A, R**	**C**	**C**
	Menu System	**C, R**	**C, R**	**I**	**A, R**	**C**	**I**
	Data Entry	**A**	**C**	**R**	**C**	**C**	**C**
	Approve Manual	**A,R**	**R**	**C**	**C**	**C**	**C**

RACI Chart Legend:

R = Responsible

A = Accountable

C = Consulted

I = Informed

REQUIRED MANPOWER

Team Assignments and Skills

***Davey Jones** – **Project manager / ID** – Technical Writer, documenting procedures, store operations and personnel expert, ID, stand-up trainer, procedures and interpersonal skills – Approvals, Information specialist (SME) for the project and has been overseeing the project,

***Ty Carriere** - **ID / Assist. Project Mgr.** – Instructional Design, assisting the PM, support with the team, Creates ID plan, oversees consistency with all departments.

** Slight change in ID/PM delegation. Davey Jones who has proven an incredible asset to the company and the project will be lead PM with Ty Carriere as the ID and assist PM.*

Ellen Tyson – Merchandising, Design Business applications, Administrative – Programming, Information, Data Input, Marketing assets

Josie Bednarski - Acquisition team, designer for training systems – Designs UI, Design Tests, Design Evaluations

Tim Hosch – Translation Expert – Consults proper language usage and creates and modified information

Barry Murphy – Management development, personal interpersonal skills – Consults with team on development content and acts as a diplomat to different resources such as the helping communicate with other stores.

****Contract – Jr. Programmer** – To help with programming the functions and beta testing

****Workforce 1** – Data Entry, Testing

* *Addendum to the original Scope*

** *Personal added during project*

REFERENCES

Viswanathan, B. (2016). Understanding Responsibility Assignment Matrix (RACI Matrix). Project Management. Retrieved from http://project-management.com/understanding-responsibility-assignment-matrix-raci-matrix/

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Larson, E., & Larson R. (2012). 10 Steps to Creating a Project Plan. Retrieved from: https://www.projecttimes.com/articles/10-steps-to-creating-a-project-plan.html

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COMMUNICATION PLANNER & PROJECT MONITORING MATRIX

DESIGNING AN ELECTRONIC PERFORMANCE SUPPORT SYSTEM FOR WIDGETMART

BY: TY CARRIERE

RATIONALE

The Case Study (CS) I chose is: CS 26 – Davey Jones: Designing an Electronic Performance Support System (EPSS). Through the years, WidgetMart has grown from 1 store in 1971 to over 5000 stores currently. In the past 2 decades, its growth exploded and like most companies, they weren't prepared for that level of expansion in that short of a time. Their training, resources, customer training procedures and materials stayed the same as when they were small and became quickly inefficient. To combat this problem, the company has chosen to transition to a EPSS and needs to transfer, update and when necessary, get rid of old materials that the company uses to train its employees.

The challenges are going to be unifying all the stores to a consistent standard, consistent training materials, and supply access to all the employees of all the stores in an online format. The biggest challenges will be organizing the mass amounts of information and getting undocumented training information from the SME's to create the content.

COMMUNICATION PLANNER

Communication for the project will be conveyed in 2 primary ways as not to create confusion or loss of time. The 2 forms of communication will be email and meetings, the detailed information will be in the form of formatted reports with comments which can include accomplishments, setbacks, challenges and suggestions which can be discussed more thoroughly in team meetings as well as updates of stored data on the servers. **Emails concerning the project timeline or deliverables sent to the stakeholders must be replied to with at least a "yes" to confirm that the information has been delivered and is understood.** Meetings are required to have minutes taken and the documented minutes will be sent to all the necessary stakeholders via email whether they attended the meeting or not because to keep everyone on track of what that status of the project is and what might be needed. Once a

task is complete, the management team must be notified through email and approved. Management team has final approval on each deliverable.

Stakeholders will also put notes in the online project planner when necessary to convey information to all the stakeholders involved.

Project Team:

Name	Title	Roles	
Davey Jones	PM/ID	Management Team	DaveyD@Widgemart.com
Ty Carriere	ID / Assist. PM	Management Team	TyC@Widgemart.com
Ellen Tyson	Programmer/App Designer	Programmer	EllenT@Widgemart.com
Josie Bednarski	UI Designer Test and Eval Designer	Designer	JosieB@Widgemart.com
Tim Hosch	Translation Expert Cultural Liason	Translation and Terminology Proofing	TimeH@Widgemart.com
Barry Murphy	Management and Personal Skills Developer	Proofing	BarryM@widgemart.com
Contract Worker	Jr. Programmer	Programming, data entry, testing	n/a
Workforce	Temp / Dept. loan	Data entry, testing	n/a

Stakeholders will follow the following information for communicating with each other. If there are any questions, ask the PM or ID for clarification.

Communication Instructions:

Project Team (Stakeholders)		Information	Check in or Due	Communication Type (supported with reports)	Project Team (Reporters)
Davey Jones PM/ID Management Team		Task updates	Weekly	Meetings	**Project Team** (everyone other than the management team)
		Final Approvals	As needed	Emails / Meetings	
		Budget Checks	Weekly or As Needed	Emails / Meetings	
		Schedule updates	Weekly	Emails	
		Deliverable Progress checks		Meetings	
Ty Carriere ID/Assist. PM Management Team		Task updates	Weekly	Meetings	**Project Team**
		Final Approvals	As needed	Emails / Meetings	
		Training data	Weekly or As Needed	Emails	
		UI Designs	Weekly	Initially meeting then emails with link to design	
Ellen Tyson Programmer/App Designer		Data from other stores	Weekly	Emailed reports	Contract Worker, Workforce, Tim, Barry
		Manual Information	Every 2 weeks	Emails / Meetings	
		Information for Marketing	Every week after UI is approved	Emails	
Josie Bednarski UI Designer Test and Eval Designer		Approvals for UI	After completion and revision of UI	Emailed / Meeting	Management Team, Tim
		Results of testing	After testing is completed	Emailed / Meeting	Contract, Workforce
		Results of Evaluations	After Evaluations are completed	Emailed / Meeting	Contract, Workforce
Tim Hosch Translation Expert Cultural Liason		All outgoing documentation approval	Weekly	Emails	Project Team
		UI Design Approval	Before and after Design Approval from PM and ID	Emails	Ellen, Josie
		Digital Manual Approval	After each section is for approval and again for final approval or revisions by time at its completion	Emails	Management Team
		Final Function Deliverables approval	After the completion of each function for approval and during the process if questions arise	Emails	Management Team
Barry Murphy Management and Personal Skills Developer		Final Function Deliverables approval	After the completion of each function for approval and during the process if questions arise	Emailed / Meeting	Ellen, Josie

		Digital Manual	After each section is for approval and again for final approval or revisions by time at its completion	Emailed / Meeting	Ellen, Josie
Contract Worker (Jr. Programmer)		Programming Tasks	Weekly	Emails / Meetings	Ellen
		Data to be organized and input	Weekly	Emails / Meetings	Tim, Barry, Ellen
		Preliminary Functions for testing	After completion of the functions online	Emails / Meetings	Ellen, Josie
Workforce		Data to be organized and input	Weekly	Emails / Meetings	Project Team

Communication form for Task changes or updates:

Communication Log

Sender	To	Date / Time	Subject/Task/Activity	Type of Communication	Confirmation Received	Comments
Davey Jones PM/ID				o Email o Phone Call o Meeting		
Ty Carriere ID/Assist. PM				o Email o Phone Call o Meeting		
Ellen Tyson Programmer/App Designer				o Email o Phone Call o Meeting		
Josie Bednarski UI Designer Test and Eval Designer				o Email o Phone Call o Meeting		
Tim Hosch Translation Expert Cultural Liason				o Email o Phone Call o Meeting		
Barry Murphy Management and Personal Skills Developer				o Email o Phone Call o Meeting		
Contract				o Email o Phone Call o Meeting		
Workforce				o Email o Phone Call o Meeting		

Project Plan - EPSS

Mid-Project Tracking Report

From 01 August 2017 to 28 February 2018. As at 21 August 2017 EDT.

Planned Start Date: **01 August 2017**
Planned Finish Date: **30 January 2018**

	WBS	Name	Planned Start Date	Planned Finish Date	Planned Duration	Milestone	Complete		Comments
Phase	**1**	**1. Project Plan**	**8/1/2017**	**9/13/2017**	**32 days**	**FALSE**	**TRUE**	COMPLETED	**Phase 1:Project Plan Complete,** No scheduling issues. All meeting documented and Plan Approved.
	1.1	Scope Statement	8/1/2017	8/8/2017	6 days	FALSE	TRUE		
	1.2	Team Responsibilities Meeting	8/4/2017	8/7/2017	2 days	FALSE	TRUE		
	1.3	Schedule	8/7/2017	9/1/2017	19.5 days	FALSE	TRUE		
	1.4	**Team Communication Guidelines**	**8/8/2017**	**8/10/2017**	**3 days**	**FALSE**	**TRUE**		
	1.5	Remote Infrastucture	8/15/2017	8/21/2017	5 days	FALSE	TRUE		
	1.6	Deliverables Analysis	9/1/2017	9/5/2017	3 days	FALSE	TRUE		
	1.7	Hardware/Software Analysis	8/25/2017	9/1/2017	5.5 days	FALSE	TRUE		
	1.8	**Analysis Budget**	**8/29/2017**	**9/5/2017**	**6 days**	**FALSE**	**TRUE**		
	1.9	**Plan Approval**	**9/1/2017**	**9/13/2017**	**9 days**	**TRUE**	**TRUE**		
Phase	**2**	**2. Data Collection**	**8/11/2017**	**9/28/2017**	**35 days**	**FALSE**	**TRUE**		**Comments**
	2.1	Organization Meeting	8/11/2017	8/15/2017	2.5 days	FALSE	TRUE		**Phase 2: Data Collection Complete,** Data Collection and organization required reallocation of resources to complete withing the scheduled time. Data Storage and Access Approved.
	2.2	**Guidelines for Data**	**8/14/2017**	**8/15/2017**	**1.5 days**	**FALSE**	**TRUE**		
	2.3	Analysis Data Storage Solution	8/14/2017	8/15/2017	2 days	FALSE	TRUE		
	2.4	Data Collection Plan	8/14/2017	8/16/2017	2.5 days	FALSE	TRUE		
	2.5	Personnel Training	8/14/2017	8/21/2017	6 days	FALSE	TRUE		
	2.6	**Implement Data Collection**	**8/21/2017**	**9/22/2017**	**24.5 days**	**FALSE**	**TRUE**		
	2.7	Categorize and Organize Data	8/21/2017	9/22/2017	24.5 days	FALSE	TRUE		
	2.8	Data Accessibility	9/18/2017	9/22/2017	5 days	FALSE	TRUE		
	2.9	Budget Check	9/18/2017	9/22/2017	5 days	FALSE	TRUE		
	2.10	**Data Storage and Access Approval**	**9/22/2017**	**9/28/2017**	**5 days**	**TRUE**	**TRUE**		
Phase	**3**	**3. Template Design**	**9/18/2017**	**10/27/2017**	**30 days**	**FALSE**	**TRUE**		**Comments**
	3.1	Brainstorm	9/20/2017	9/26/2017	5 days	FALSE	TRUE		**Phase 3: Template Design Complete,** Design of the UI has been completed. Programing with the help of the contract programmer was completed. Preliminary Function test approved.
	3.2	Design UI	9/26/2017	10/10/2017	10.5 days	FALSE	TRUE		
	3.3	**Programming**	**10/12/2017**	**10/25/2017**	**13 days**	**FALSE**	**TRUE**		
	3.4	Data Input	9/18/2017	10/23/2017	26 days	FALSE	TRUE		
	3.5	Approve UI Menu System	10/10/2017	10/11/2017	1.5 days	FALSE	TRUE		
	3.6	Approve Mobile Hardware	10/20/2017	10/26/2017	5 days	FALSE	TRUE		
	3.7	**Budget Check**	**10/23/2017**	**10/27/2017**	**5 days**	**FALSE**	**TRUE**		
	3.8	**Approve Functionality**	**10/16/2017**	**10/27/2017**	**10 days**	**TRUE**	**TRUE**		
Phase	**4**	**4. Deliverables**	**10/2/2017**	**12/1/2017**	**45 days**	**FALSE**	**FALSE**	PASTDUE	**Comments**
Current Phase	4.1	Applications (with embedded Knowledge)	10/2/2017	12/1/2017	45 days	FALSE	FALSE		Phase 4: Deliverables are in development, Connecting data has been more difficult than anticipated. Tasks 4.1 and 4.2 are behind schedule. Reassigning the Workforce employee to help complete.
	4.2	Reference Function	10/2/2017	10/20/2017	15 days	FALSE	FALSE		
	4.3	Job Aid Function	10/20/2017	11/8/2017	14 days	FALSE	FALSE	PENDING	
	4.4	Instruction Function	11/8/2017	11/27/2017	14 days	FALSE	FALSE		
	4.5	Ops and Training Manual (Computer Accessible)	10/2/2017	12/1/2017	45 days	FALSE	FALSE		
Phase	**5**	**5. Testing & Implementation**	**12/1/2017**	**1/30/2018**	**43 days**	**FALSE**	**FALSE**		**Comments**
	5.1	Strategy for Testing	12/1/2017	12/8/2017	6 days	FALSE	FALSE		
	5.2	Implement Testing	12/4/2017	12/21/2017	13.5 days	FALSE	FALSE		
	5.3	Report Testing Results	12/12/2017	12/19/2017	6 days	FALSE	FALSE		
	5.4	Revision Recommendations	12/20/2017	12/27/2017	6 days	FALSE	FALSE		
	5.5	Implement Revisions	12/28/2017	1/4/2018	6 days	FALSE	FALSE		
	5.6	Final Approval	1/5/2018	1/16/2018	8 days	FALSE	FALSE		
	5.7	Implement Global Training	1/1/2018	1/29/2018	21 days	FALSE	FALSE		
	5.8	Implement Global Rollout	1/30/2018	1/30/2018	1 day	FALSE	FALSE		

Tasks - EPSS

on 21 August 2017 EDT

EPSS

WBS	Task Name	Project Status	Planned Start Date	Planned Finish Date	Assigned To	Actual Start Date	Actual Finish Date	Complete	Priority	Notes	Summary
1.1	Scope Statement	Open	8/1/2017	8/8/2017	Ty [28.57%] Davey Jones [28.57%] Tim Hosch [42.86%]	8/1/2017	8/21/2017	True	High	Scope statement completed and approved early! 8/5/2017 Ty Carriere	False
1.2	Team Responsibilities Meeting	Open	8/4/2017	8/7/2017	Ty [13.79%] Davey Jones [13.79%] Ellen Tyson [13.79%] Josie Bednarski [13.79%] Tim Hosch [31.03%] Barry Murphy [13.79%]	8/4/2017	8/21/2017	True	High	Meeting was successful, all members acknowledged job assignments. 8/7/2017 Davey	False
1.3	Schedule	Open	8/7/2017	9/1/2017	Ty [50%] Davey Jones [50%]	8/7/2017	8/21/2017	True	High	Schedule Meeting completed and put in ProjectManager.com All team members have Access. 9-1-2017 Ty	False
1.4	Team Communication Guidelines	Open	8/8/2017	8/10/2017	Ty [0%] Davey Jones [20%] Ellen Tyson [20%] Josie Bednarski [20%] Tim Hosch [20%] Barry Murphy [20%]	8/8/2017	8/21/2017	True	High		False
1.5	Remote Infrastucture	Open	8/15/2017	8/21/2017	Ty [25%] Ellen Tyson [75%]	8/15/2017	8/21/2017	True	High		False
1.6	Deliverables Analysis	Open	9/1/2017	9/5/2017	Ty [50%] Davey Jones [50%]	9/1/2017	9/1/2017	True	High		False
1.7	Hardware/Software Analysis	Open	8/25/2017	9/1/2017	Ty [50%] Davey Jones [50%]	8/25/2017	8/25/2017	True	High		False
1.8	Analysis Budget	Open	8/29/2017	9/5/2017	Ty [50%] Davey Jones [50%]	8/29/2017	8/29/2017	True	High		False
1.9	Plan Approval	Open	9/1/2017	9/13/2017	Ty [0%] Davey Jones [50%] Ty Carriere [50%]	9/1/2017	9/1/2017	True	High		False
2.1	Organization Meeting	Open	8/11/2017	8/15/2017	Mike Smith (Sample) [14.29%] Ty [14.29%] Davey Jones [14.29%] Ellen Tyson [14.29%] Josie Bednarski [14.29%] Tim Hosch [14.29%] Barry Murphy [14.29%]	8/11/2017	8/21/2017	True	High		False
2.2	Guidelines for Data	Open	8/14/2017	8/15/2017	Mike Smith (Sample) [14.29%] Ty [14.29%] Davey Jones [14.29%] Ellen Tyson [14.29%] Josie Bednarski [14.29%] Tim Hosch [14.29%] Barry Murphy [14.29%]	8/14/2017	8/21/2017	True	High		False

2.3	Analysis Data Storage Solution	Open	8/14/2017	8/15/2017	Davey Jones [20%] Ty Carriere [40%] Josie Bednarski [40%]	8/14/2017	8/21/2017	True	High		False
2.4	Data Collection Plan	Open	8/14/2017	8/16/2017	Ty [22.22%] Davey Jones [22.22%] Ellen Tyson [22.22%] Josie Bednarski [11.11%] Tim Hosch [11.11%] Barry Murphy [11.11%]	8/14/2017	8/21/2017	True	High		False
2.5	Personnel Training	Open	8/14/2017	8/21/2017	Davey Jones [16.67%] Tim Hosch [16.67%] Barry Murphy [66.67%]	8/14/2017	8/21/2017	True	High		False
2.6	Implement Data Collection	Open	8/21/2017	9/22/2017	Ty [32.43%] Davey Jones [2.7%] Ellen Tyson [32.43%] Tim Hosch [16.22%] Barry Murphy [16.22%]	8/21/2017	8/21/2017	True	High		False
2.7	Categorize and Organize Data	Open	8/21/2017	9/22/2017	Ellen Tyson [40%] Josie Bednarski [40%] Tim Hosch [20%]	8/21/2017	8/21/2017	True	High		False
2.8	Data Accessibility	Open	9/18/2017	9/22/2017	Ellen Tyson [66.67%] Josie Bednarski [33.33%]	9/18/2017	9/18/2017	True	High		False
2.9	Budget Check	Open	9/18/2017	9/22/2017	Ty [50%] Davey Jones [50%]	9/18/2017	9/18/2017	True	High		False
2.10	Data Storage and Access Approval	Open	9/22/2017	9/28/2017	Davey Jones [20%] Ty Carriere [20%] Ellen Tyson [20%] Josie Bednarski [20%] Tim Hosch [20%]	9/22/2017	9/22/2017	True	High		False
3.1	Brainstorm	Open	9/20/2017	9/26/2017	Ty [14.29%] Ellen Tyson [14.29%] Josie Bednarski [71.43%]	9/20/2017	9/20/2017	True	High		False
3.2	Design UI	Open	9/26/2017	10/10/2017	Ty [26.32%] Ellen Tyson [17.54%] Josie Bednarski [42.11%] Barry Murphy [14.04%]	9/26/2017	9/26/2017	True	High		False
3.3	Programming	Open	10/12/2017	10/19/2017	Ty [2.33%] Davey Jones [9.3%] Ellen Tyson [29.07%] Josie Bednarski [4.65%] Barry Murphy [17.44%] Contract Programmer [37.21%]	10/12/2017	10/12/2017	True	High		False
3.4	Data Input	Open	9/18/2017	10/23/2017	Workforce 1	9/18/2017	9/18/2017	True	High		False
3.5	Approve UI Menu System	Open	10/10/2017	10/11/2017	Ty [16.67%] Davey Jones [16.67%] Ellen Tyson [16.67%] Josie Bednarski [16.67%] Tim Hosch [16.67%] Barry Murphy [16.67%]	10/10/2017	10/10/2017	True	High		False
3.6	Approve Mobile Hardware	Open	10/20/2017	10/26/2017	Ty	10/20/2017	10/20/2017	True	High		False

3.7	Budget Check	Open	10/23/2017	10/27/2017	Ty [33.33%] Davey Jones [33.33%] Barry Murphy [33.33%]	10/23/2017	10/23/2017	True	High		False
3.8	Approve Functionality	Open	10/16/2017	10/27/2017	Ty [12.5%] Davey Jones [12.5%] Josie Bednarski [25%] Tim Hosch [50%]	10/16/2017	10/16/2017	True	High		False
4.1	Applications (with embedded Knowledge)	Open	10/2/2017	12/1/2017	Ty [28.57%] Davey Jones [28.57%] Ellen Tyson [42.86%]			False	High		False
4.2	Reference Function	Open	10/2/2017	10/20/2017	Ellen Tyson [55.17%] Barry Murphy [17.24%] Contract Programmer [27.59%]			False	High		False
4.3	Job Aid Function	Open	10/20/2017	11/8/2017	Ellen Tyson [75%] Contract Programmer [25%]			False	High		False
4.4	Instruction Function	Open	11/8/2017	11/27/2017	Ty [3.07%] Davey Jones [3.07%] Ellen Tyson [28.74%] Josie Bednarski [13.41%] Tim Hosch [28.74%] Barry Murphy [17.24%] Contract Programmer [5.75%]			False	High		False
4.5	Ops and Training Manual (Computer Accessible)	Open	10/2/2017	12/1/2017	Ty [12.21%] Davey Jones [13.74%] Josie Bednarski [22.9%] Tim Hosch [12.21%] Barry Murphy [8.4%] Workforce 1 [30.53%]			False	High		False
5.1	Strategy for Testing	Open	12/1/2017	12/8/2017	Ty [14.95%] Davey Jones [7.48%] Ellen Tyson [23.36%] Josie Bednarski [23.36%] Tim Hosch [23.36%] Barry Murphy [7.48%]			False	High		False
5.2	Implement Testing	Open	12/4/2017	12/21/2017	Ty [7.67%] Davey Jones [4.79%] Ellen Tyson [7.67%] Josie Bednarski [15.97%] Tim Hosch [15.97%] Barry Murphy [15.97%] Workforce 1 [15.97%] Contract Programmer [15.97%]			False	High		False
5.3	Report Testing Results	Open	12/12/2017	12/19/2017	Ty [9.7%] Davey Jones [14.55%] Ellen Tyson [12.73%] Josie Bednarski [19.39%] Tim Hosch [29.09%] Barry Murphy [14.55%]			False	High		False

5.4	Revision Recommendations	Open	12/20/2017	12/27/2017	Ty [12.2%] Davey Jones [12.2%] Ellen Tyson [12.2%] Josie Bednarski [12.2%] Tim Hosch [12.2%] Barry Murphy [12.2%] Workforce 1 [14.63%]			False	High		False
5.5	Implement Revisions	Open	12/28/2017	1/4/2018	Ty [16.67%] Davey Jones [16.67%] Ellen Tyson [16.67%] Josie Bednarski [16.67%] Tim Hosch [16.67%] Barry Murphy [16.67%]			False	High		False
5.6	Final Approval	Open	1/5/2018	1/16/2018	Ty [16.67%] Davey Jones [16.67%] Ellen Tyson [16.67%] Josie Bednarski [16.67%] Tim Hosch [16.67%] Barry Murphy [16.67%]			False	High		False
5.7	Implement Global Training	Open	1/1/2018	1/29/2018	Ty [14.4%] Davey Jones [14.4%] Ellen Tyson [14.4%] Josie Bednarski [14.4%] Tim Hosch [14.4%] Barry Murphy [14.4%] Workforce 1 [13.6%]			False	High		False
5.8	Implement Global Rollout	Open	1/30/2018	1/30/2018	Ty [14.29%] Davey Jones [14.29%] Ellen Tyson [14.29%] Josie Bednarski [14.29%] Tim Hosch [14.29%] Barry Murphy [14.29%] Workforce 1 [14.29%]			False	High		False

PROJECT CLOSEOUT CHECKLIST

DESIGNING AN ELECTRONIC PERFORMANCE SUPPORT SYSTEM FOR WIDGETMART

BY: TY CARRIERE

To conclude this project, we need to implement a sign off of all parties involved after the completion of the evaluations of the new online EPSS program.

The following stakeholders will need to sign off the tasks they were responsible for.

Stakeholders involved in the project:

Name	Title	Roles	
Davey Jones	PM/ID	Management Team	DaveyD@Widgemart.com
Ty Carriere	ID / Assist. PM	Management Team	TyC@Widgemart.com
Ellen Tyson	Programmer/App Designer	Programmer	EllenT@Widgemart.com
Josie Bednarski	UI Designer Test and Eval Designer	Designer	JosieB@Widgemart.com
Tim Hosch	Translation Expert Cultural Liason	Translation and Terminology Proofing	TimeH@Widgemart.com
Barry Murphy	Management and Personal Skills Developer	Proofing	BarryM@widgemart.com
Contract Worker	Jr. Programmer	Programming, data entry, testing	n/a
Workforce	Temp / Dept. loan	Data entry, testing	n/a

For this project to officially given to the client and considered finished, the deliverables and the evaluations must be signed off by the

SIGN-OFF FORM

This document approves the listed deliverables promised for the WidgetMart Co. as agreed upon in the initial statement of work.

Deliverable 1	**Applications**	
By signing this off, CID (Carriere Instructional Design) states that this deliverable is ready and approved.		
Name	Signature	Date
Davey Jones		
Ellen Tyson		
Deliverable 2	**Reference Function**	
By Signing this off, CID states that this deliverable is ready and approved and has met with the specifications that were dictated.		
Name	Signature	Date
Davey Jones		
Ellen Tyson		
Deliverable 3	**Job Aid Function**	
By Signing this off, CID states that this deliverable is ready and approved and has met with the specifications that were dictated.		
Name	Signature	Date
Davey Jones		
Ellen Tyson		
Deliverable 4	**Instruction Function**	
By Signing this off, CID states that this deliverable is ready and approved and has met with the specifications that were dictated.		

Name	Signature	Date
Davey Jones		
Ellen Tyson		

Deliverable 5	**Ops and Training Manual**

By Signing this off, CID states that this deliverable is ready and approved and has met with the specifications that were dictated.

Name	**Signature**	**Date**
Davey Jones		
Ty Carriere		
Tim Hosch		
Barry Murphy		

Deliverable 6	**Testing and Implementation**

By Signing this off, CID states that these deliverables were tested and evaluated

Name –	Signature	Date
Davey Jones		
Ty Carriere		
Josie Bednarski		
Ellen Tyson		

Final Sign off of CID		
By Signing this off, CID states that this deliverable is ready and approved and has met with the specifications that were dictated.		
Name –	Signature:	Date
Davey Jones		
Name –	Signature:	Date
Ty Carriere		

Final Sign off of WidgetMark		
I hereby give my approval of the deliverables I've just reviewed and as a representative of the WidgetMart, Corp. I am authorized to sign and except the deliverables. I also acknowledge that any changes to the deliverables after signed might result in additional charges, additional resources and additional time		
Name – WidgetMart Representative:	Signature:	Date

Thank you for using CID to help with your instructional and consulting needs. Please fill out the survey you will be sent in a week to let us know how we did. We are always striving to be the best at what we do.

REFERENCES

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