

we haven't
Lessons Learned *but haven't put into practice*



**TECHNOLOGY LEARNING
REDACTED CURRICULUM**

Resource Management

Focus Areas



PROJECT COMMUNICATION
TEAM EXPERIENCE
MANAGEMENT INTERACTION
MANAGEMENT SUPPORT
QUALITY OF MEETINGS

Project Communication



On-going Issues

- Expectations of trainers-as-SMEs not communicated.
- Trainers are inexperienced in the role and have not been properly prepared.
- We have not provided initial or planned for on-going support for trainers-as-SMEs.
- Senior trainer's role ever-changing with little consideration to affect on team members and project as a whole.
- It was only in our fourth project that we supplied supporting documentation to help project participants understand the processes involved.
- ID initiated a last-minute discussion with trainer in first-time SME role.

Roles & Responsibilities

- Project Manager role non-existent.
- Senior trainer's role in the project not clearly defined.
- Trainers-as-SMEs more applicably fill resource role.
- ID role a generalized one, but viewed and presented by management in different light.



Conclusion

Lack of direction.

Perceptions and Realities

Management has not followed standardized approach to project. Therefore, we might conclude that:

- Management does not support the project.
- Management does not provide support to project team.
- Management does not expect accountability of team members.

Project Communication



On-going Issues

- Communication with team continues to cause challenges and issues.
- No project team meetings leaves room for person interpretation.
- And not everyone receives the same message .
- Team members may unknowingly work at cross-purposes, or create redundancies.

Team Communication

- It is unclear if issues raised in weekly status meetings are discussed with other project team members.
- One-on-one discussions leaves other team members out of the loop.
- Issues raised by one team member are not addressed with project team as a group, therefore not all sides can be equally considered.
- No follow-up mechanism in place for continued discussion of issues, resolutions, challenges, or what worked.
- On-going issues not formally documented, prioritized, categorized, or given a status (e.g., resolved, escalated).
- Where corrective action has been taken, or process modified, there is not a feedback mechanism to report favourable/unfavourable results.



Conclusion

Unsustained communication.

Patchy communication with team members, and the project team as a whole, contributes to frustration and incomplete direction; it can also result in missed deadlines and diminished product quality.

Production seems to be the project's driving criterion, but ultimately, meeting deadlines does not determine a project's success.

Perceptions and Realities

- Continued communication issues results in miscommunication.
- Team members are unclear about who is doing what, so the work either it gets done (differently) by two people, or it does not get done at all.
- Rework is wasted work effort and often results in components being missed. This impacts the project's success by diminishing the quality of the product.
- Assigned tasks could help resolve this, but without a project manager, who is responsible for creating and assigning tasks? And who would follow up on these action items?
- Potential issues also remain unidentified because no one team member has been formally assigned tasks.

Project Communication



On-going Issues

- Discovery stage is handled with quick-method approach.
- Standards for discovery and review have not been set. Process has been documented, but the meaning does not translate well to trainers-as-SMEs.
- No data standards for Redacted.
 - ▶ No documentation for setting up provincial database.
 - ▶ No consistency from province-to-province (e.g., different patients, different drugs).
 - ▶ Screen images vary province to province (not following curriculum style).
- Without a centralized point of communication, standards to follow, and a method to capture discrepancies between provincial SMEs
- Provincial SMEs do not report the same changes for Redacted upgrades. Reported, but undocumented and unresolved.

Standards for SMEs

- Master version (Ontario) is not an accurate version to follow.
- No checklist ensure standardized settings, such as pharmacy preferences, user preferences, and Workbench display options, such as:
 - ▶ Active only checkbox turned on for redacted field.
 - ▶ Redacted field on redacted screen.
 - ▶ Redacted display options.
- No standardized DINs, names, addresses, postal codes, doctor names, a la Redacted user documentation.
- Variances in ON were not documented when discovered, and therefore remain intact.
- Who will be responsible for creating, documenting, and communicating data standards?



Conclusion

Scale back.

Without regular and insistent interaction with the project, its issues, and team members as a group, communication and processes continue to break down.

Stop-gap measures exist, but solutions are not transferred project to project.

Perceptions and Realities

- By excusing itself from the process, management does not support the project.
- Without support, management does not expect team members to be accountable for their work.
- Without a standardized approach to the project, team members are not accountable to adhere to timelines, work schedule, or quality output.

Team Experience



On-going Issues

- Knowledge gaps in how to gather information, what sources are available, and who to speak to confirm findings.
- Aware of, but unfamiliar with contents of process flow charts and how they translate to this SME role.
- Aware of, but unfamiliar with contents of Standards & Style Guide and how to use it.
- Lack of time to support trainers in new roles.
- Responsibility for accuracy, consistency, and completeness have not resided with the ID role where it might best be suited.

Limitations/Constraints

- If trainers don't buy-in to product, how can they be expected to be committed to producing it?
- Work effort is not focussed solely on curriculum, it is a side job.
- Availability of trainers whose primary function is to train.
- Reviewing 500 pages of content, 85-90% has not been changed province to province seems redundant.
- Modify approach from review to only sections that have been modified from master version.
- Adjust task to more closely match the environment a trainer is familiar and comfortable with.
- Reframe the task. To strengthen the content, challenge SME reviewers to locate errors only.



Conclusion

Continued frustration.

Team members continue to experience frustration with the processes.

Developmental needs of project team members not being met.

Perceptions and Realities

- Resources that support the project are often underutilized, but when brought onto the project they are overextended. Trainers as SMEs are given unclear expectations and unrealistic timelines.
- Documentation was created to target weakness and fill gaps in process. Similarly, documentation was created to target standards and style. These documents are resources, not replacement for sustained support.
- Other methods in line with train-the-trainer programs might better serve the trainers instead of supplying document describing their role and offering a checklist to follow.
- Responsibility for accuracy, consistency, and completeness might best remain with the ID role given the thrice-reviewed (and signed-off) state of the curriculum.
- Altering our model to one of trainer as resources—assigned or based on in-office availability—rather than SMES, might work better.

Management Interaction



On-going Issues

- No designated project manager.
- Team members' roles not formalized.
For example, a senior trainer was moved in and out of a role as a SME, with other trainers substituting.
The primary team members created a working method and rhythm that was not easily transferred to her replacements.
Without succession planning and without clear communication of her new role, her responsibility has been pushed to the fringe, thereby restricting her involvement on a project requiring her expertise.
- Team members' responsibilities not formalized.
- Project does not follow standardized process.

Project Management

- Status meetings were implemented for AB, BC, and NS, but issues continue province to province.
- Issues are compounded by the introduction of individuals into a broken process.
- Lessons Learned (post-mortem) should be performed by all participants and shared with all team members in a formalized setting post-production.
- Lessons Learned should include behaviours, attitudes, approaches, forms, resources, and protocols.
- A formalized Project Kick-off should include changes made as a results from Lessons Learned from previous project.



Conclusion

Progress undermined.

When a team self-manages, it follows an ineffective model of leaderless management.

Perceptions and Realities

- Project schedule created, only formalized plan that exists.
- Without a stated hierarchy in place, without a formalized approach to the project, without involvement the message to team members is mixed: you are accountable for everything and responsible for nothing. And vice versa.
- To date, the documentation created to support the process has not been used to build and improve upon the areas where we could do better.
 - ▶ Lessons Learned document; issued May 2010
 - ▶ Curriculum processes; issued October 2010
 - ▶ Status meeting agenda listing progress, issues, and inquiries; created weekly since November 20, 2010
 - ▶ Redacted curriculum project schedule; first draft issued October 2010
 - ▶ Learners' Guides Styles and Standards document; issued October 2010
- When efforts for improvement are met with futility, frustration reigns and productivity wanes.

Quality of Meetings



On-going Issues

- Status meetings were implemented for AB, BC, and NS, but issues continue province to province.
- Regular meetings of one hour at the exclusion of other team members.
- A status update is provided by individual in ID role, but no minutes are taken.
- Issues are not formally captured in an Issues Log and often remain unresolved from one meeting to the next.
- Without an issues log, action items are not assigned to any one team member, or management, for resolution.

Status Meetings

- Issues reported become action items only under explicit direction.
- Placing the responsibility to identify issues that require managerial intervention with a team member makes decision-making implicit, but without authority to act can mean:
 - ▶ indecision
 - ▶ reversed decisions (vetoed after the fact), or
 - ▶ made without consideration of the project and project team.
- In a manage-up model, direct reports must investigate preferred methods of working and consistently inquire about expectations which impedes progress. This is particularly challenging for employees unfamiliar with this management style.



Conclusion

Needs improvement.

Quality of Meetings. Issues raised in status meetings remain unresolved and are compounded. They transfer project to project adding confusion, dissatisfaction, and discontent.

Negative traits can carry over to other work.

Perceptions and Realities

- Placing the responsibility to identify issues that require managerial intervention with team members without providing the authority to act on potential solutions hinders progress, and obstructs rather than cultivates an culture of continued improvement.
- The requirement to call out an issue as an action item seems redundant. Issues are raised in status meetings because they could not be resolved by the team member tabling the issue. Had the issue been resolved, it would not be raised. Therefore, the need to call it out as an action item seems redundant.
- Lack of action could be seen as a lack of commitment to change.

Resolutions Implemented

The following recommendations were presented to management then implemented to support the development of Redacted Learners' Guides



- **PROJECT SCHEDULE CREATED**
regularly updated
made available to training team
- **ON-GOING COMMUNICATION**
between ID and SME, ID and senior trainer
among project team members
- **PROCESS FLOWS CHARTED**
to standardize work flow and methods
created, implemented, and introduce to team
- **INFORMATION SESSIONS WITH TRAINERS**
to discuss approach to curriculum, style and standards, ID role,
with focus on objectively viewing content from learners'
perspectives

Further Development

The following recommendations support the continued development of Redacted Learners' Guides



- **LESSONS LEARNED**

to be completed post-production by all team members involved to gain perspective from SME, ID, PM, and Reviewers

- **INFORMATION SESSIONS WITH TRAINERS**

continue work sessions to close knowledge gaps and further develop research skills and writing skills

- **SUPPORTING DOCUMENTATION**

with trainers continuing in SME and resource roles, management and the project team members must offer sustained support

Notes

Action Items from Lessons Learned

