CRAIG GERSEN CASE

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Stakeholders

Stakeholders		
Name	**Position**	**Characteristic**
Craig Gregerson (ID)	**Instructional Designer / External Consultant**	Instructional Designer (ID) hired by Electron Corporation (EC) to provide a one-day training course for all EC employees covering product safety with the goal of "providing a proactive approach"…to "prevent lawsuits from happening" (Ertmer, Quinn, & Glazewski, 2014, p. 205). Excited to combine ID and legal experience in project.
Electron Corporation (EC)	**Sponsor**	A leading international designer & manufacturer of two-way communication devices & software for business clients also expanding into consumer products.
Louise Massoff (EC)	**Client/Training Project Manager**	Ostensibly the lead for the project, initial requirements of the project and coordinating communication. However, is "hands-off" and reluctant to address contradictory scope challenges presents by other stakeholders in course development.
Stan Neuhaus (EC)	**SME/Chair of EC Safety Steering Committee**	As Chair of Safety Committee, Stan could be considered an SME for the course, and has already drafted a "company-wide product safety program that established a comprehensive organizational structure and detailed procedures for a number of [liability] issues" (Ertmer, Quinn, & Glazewski, 2014 p. 206). Believes the previous course was ineffective in design and that its content did not meet the daily needs of employees. Other stakeholder groups are reluctant to engage or challenge Legal's view of the EC's training needs.
Richard Mull (EC)	**SME/Head of EC Legal**	As head of legal, appears to have approval authority for anything Craig creates. As creator of previous (poorly received) course, resistant to need to have new course created and has requested that simply Craig "jazz-up" old material. Does not appear to understand need to align objectives with learner needs or does not agree with other SMEs and stakeholder as to what learner needs actually are. Has been so far resistant to the needs and ideas Craig has expressed after interviews with learner groups. Perceives expressed learner safety/liability instructional needs, and proposed protocols for addressing said needs, as potentially opening EC to additional liability and legal problems. Concerned that none of the course material increases the

Commented [AK1]: Something worth noting is not only is he an IDer, he's an outside consultant in this case…

Commented [AK2]: What do you think is creating this reluctance?

Commented [AK3]: I'm not sure I agree with this—what is the content of the course, product liability right? So, that would make Richard (as you've identified) the SME… Stan and the engineers would represent the audience.

On this note, Stan seems to have a really loud voice in this case—should he? I'm not saying he should or shouldn't, but it something to think about…

Commented [AK4]: What is the reason for this? Does he have a legitimate reason for being reluctant about working with Craig?

		liability risk of Electron Corporation.
All other EC Employee Groups	**Engineering Management, Line Engineers/workers, Field Engineers, Installation & Maintenance, Marketing & Sales**	As part of the Analysis stage, Craig has encountered various learner groups in the company who express learning needs that appear divergent from each other. Management Engineers have different safety ~~&~~ and liability concerns than Line Engineers, who have different concerns than Safety Engineers. Further complicating the matter are the different considerations expressed by Installation ~~&~~ and Maintenance workers, as well as the concerns of Marketing and Sales. Craig's interviews with these learner groups have lead him to the belief that the training need at EC is much broader than a one day course for all employees could possibly accomplish.

Top 3 environmental issues

Issue #1: Unwilling/uncooperative stakeholders
Discussion. The project manager must address the legal team's unwillingness to cooperate with the project. It is apparent that the legal team has strong feelings about the adequacy of the content from the previous training session conducted two years ago. Additionally, the legal team is very concerned about content that will establish new standards for the company; this then becomes another document that can hold the company liable in addition to common law and general regulations. The legal team is also very sensitive that the engineers even shared a comprehensive outline of a proposed companywide product safety program. Although Richard from legal vehemently opposed the draft document, Craig realized the utility in such a document. The main friction point is that Craig needed Richard's approval to finalize the project. This is a Project Quality requirement; the project cannot be finalized without the legal team's approval.
Suggested Resolution. Since Craig has identified that Richard's approval is a critical vulnerability to his project's success, he may need more of Richard's involvement rather than less. According to Horine (2017), part of managing project quality is to focus on verification. Stan and Louise, for right or wrong, have only identified one critical group within the company for verification standards, and that is the legal team. They "would need to be consulted on everything" (Ertmer, Quinn, & Glazewski, 2014, p. 205). All other departments are content contributors. A tool that Craig could use to ensure that he receives feedback at appropriate measures is the V method as described by Horine (2017), where he aligns deliverables with validation methods. As Craig goes through the instructional design process (deliverable items), he can pull the legal team through each step as verifiers. This approach may be beneficial to the legal team; giving them an instructional designers approach to the content. However, this will rely heavily on Craig's interpersonal skills to create buy-in from the legal team. Instead of going directly to Richard, Craig could have conducted needs assessments in the other departments, reviewed the four-hour long course, paired useable information from the four-hour course, and then engaged with the legal team. This may have

Commented [AK5]: Where's the common ground, here?

Commented [AK6]: Cite the author of the case here, not the editors…

helped Craig build rapport with Richard, given validity to Richard's work (which he seemed to be proud of), and demonstrated that he was a supporting element and was not trying to usurp Richard's area of expertise.

Issue #2. Unrealistic/Contradictory Expectations from various stakeholders

Discussion: In Craig's ever-expanding list of apparent stakeholders, all seem to believe that the training Craig has been hired to implement could be a chance to provide liability training that specifically addresses the concerns of their own division.

The Engineering group wishes to see the training address gaps in systemic approaches and processes to address liability "up-front". Engineering Management is interested in decision-making processes, especially in light of international liability concerns. The Sales and Marketing Team is interested in how the training addressed their sales claims for Electron Products. Consumer services (installation, service & maintenance) has separate liability concerns for all aspects of consumer interaction.

Finally, each of these groups is independently concerned with international variations in manufacturing and design standards, and no single Electron organizational entity is responsible for keeping all groups updated.

Suggested Resolution: All these specific, yet divergent, expectations can hugely impact the scope of the project, leading to "Scope Creep". Craig has come into this project with what appears to be "poor initial requirements" (Turk, 2010). The initial project description implied a one-day training, covering liability training for the entire company. As Craig has spoken with Stakeholder groups, it has become clear that there is unlikely to be any training product that can meet the needs of all Electron employees, while remaining within the constraints that Legal as imposed or the time constraint Louise insists on. Until Craig has a handle on the actual scope of the project and clarifies what he will actually be "allowed" to do, vis-à-vis Legal's input, it may be that he will have no way to satisfy all apparent stakeholders.

Craig can propose, with evidence from his analysis interviews, an expanded training regimen in an attempt actually to meet the company safety and liability training needs. While the case indicates that lawsuits are not an issue for the company now, Craig could also propose a root cause analysis (Rooney & Heuvel, 2004), to examine the source of any failures for the past and current cases, and use this analysis to inform instruction. The risk is that this will be rejected outright by Legal. There is no indication that Craig would have any authority to appeal to, if rejected.

Even if Craig is rejected in his proposal, he can work to make the objectives clearer with Legal, and create a course that meets those specific objectives. While Legal is functioning as a "roadblock" to most other stakeholders that does not mean their concerns are without merit. Providing an effective course that meets the learning objectives that Legal actually has would not be a "bad" thing for Craig to put his name to, especially from the standpoint that he was not hired to satisfy the particular learning needs of all stakeholder groups on this topic.

Issue #3: Internal conflict within client organization

Commented [AK7]: This does seem to be a challenge—at the end of the day, who does Craig have to please? Who is his boss?

Commented [AK8]: How might he meet at least some of their needs?

Commented [AK9]: Here, it might be worth it to discuss different options with outcomes…

Craig is faced with working with an organization that has internal conflicts in regard to this project.

Stan's concern is reflective of the time that they are providing for the completion of the project. They are under the presumption that the learners have prior knowledge that can be built-on. Their perspective is the need for the engineers to develop "an understanding of these procedures". As such, they are under the impression that the project can be completed in three weeks of design and development time. The engineering and other employee departments are in disagreement with legal department's perspective of a generalized training. Disagreement, according to Sutterfield, Stroud, and Blackwell, 2007) is when "one party's values, needs, interests, opinions, goals or objectives are divergent from those of the other party. "(p. 220)

Engineers are detail oriented and are seeking a course that provides them with a number of solutions. Line engineers are interested in solving specific problems. Engineering managers within Electron are interested in decision-making procedures that would shield their respective responsibilities within the within the context of international trade.

Legal has its concerns about the breadth of information that could be disclosed in the training. They have a legitimate concern about the establishment of precedents within the jurisprudence framework in which they operate. It could be insinuated that Legal's position is that the engineers do not understand the legal realities of the choices they are making in regard to the training.

The marketing and sales department are concerned about their claims about the products. Lastly, the boots on the ground installation, servicing, and maintenance departments too had their concerns about their work would impact the liability concern of Electron.
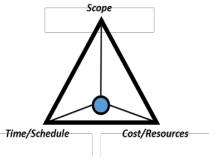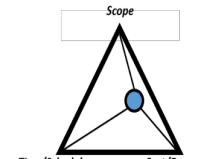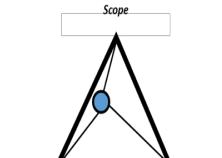
Internally, Electron lacks a repository to inform its employees of the standards within manufacturing and design that were being disseminated.

Suggested Resolution:

With the environment within the various departments of Electron, Craig has to look at himself within his role as a consultant. Sutherfield, Friday-Stroud, and Blackwell (2007), provide a Project-Conflict Management Framework that can be considered to resolve the problems that Craig is identifying within Electron, Inc. Based on the framework, Craig should utilize a matrix support structure strategy to develop consensus on this organizational interpersonal based conflict. This is key to the project because Louise, the current project manager, is unwilling to partake in the office political dynamics with the legal department. (p. 207)

The benefit of this consensus building approach perspective according to Sutherfield et al. (2007), is to provide assurance that each party in dispute achieve a "workable compromising strategy" (Sutherfield, et al, 2007, p. 234). The authors' express the notion that this strategy would avoid power-struggles amongst the parties and minimize the chance that organizational politics interfere with the success of project.

Triple Constraints

Representation	Thinking of Craig's project, What are the specific implications of adopting a strategy that focuses primarily on two of the three constraints at once?
Scope *Time/Schedule* *Cost/Resources*	If Craig decides to focus on Time & Cost at the "expense" of scope, meaning he allows no expansion of the scope, as he understands it, he may end up with a product that pleases no one. The stakeholders (Engineers, Marketing & Sales) may feel that their input and needs were rejected. This would lead to poor "buy-in" from those groups, which in turn would lead to poor learning outcomes. (kw)- Propose alternative goals, and/or separate trainings for separate divisions.
Scope *Time/Schedule* *Cost/Resources*	Given the scope-creep of this project, a decision to focus on Scope and Cost as opposed to time places Craig in a situation where he may spend more time than provided in the contract. This would not please the stakeholders (Electron) who signed a five-week agreement. Conversely, if time is constrained Craig's may produce a less than stellar product for an international firm, placing his company's reputation on the line.
Scope *Time/Schedule* *Cost/Resources*	This is unique in two ways. If there is an increase in scope there will naturally be in increase in time (more learning objectives require more development hours for development). In addition, more learning objectives may also mean that the training itself cannot be contained in one day, or that the training is not all-inclusive, but is broken down by department. This depends on the value that Electron placed on the training. So far, the company has not experienced a lawsuit, they may recognize the risk, but are balancing the cost (time it takes to train). Although Electron gave Craig a five-week time constraint, Craig never asked why the five-week period was established. Was this an estimated date, or does the training influence a time frame? As previously mentioned, this is proactive training, but they never mentioned a need for the time constraint. Of the requirements, there was no hard and fast requirement for the five-week window.

Commented [AK10]: Good consideration of the various constraints in this section—I'm only wondering about the last prompt in this section: After considering the project from each angle, what do you think is the best strategy that Craig can use to manage all three constraints in the given project?

Managing Risk: (Avoidance, Acceptance, Monitor & Prepare, Mitigation, Transference)

Top 3 Instructional Design Industry Risks

1. Unclear requirements/objectives
As illustrated in Craig's case, companies often realize they have a problem or need that they cannot internally solve. However, they may not always realize the full parameters of the problem. Additionally, they may have little understanding of the resources and time involved to create an adequate instructional solution.   This can lead to unrealistic expectations of the project manager and the learning product. For example, if contracted for a training class, in a manufacturing setting when the problem is that the production process is inherently flawed, the training product will not provide the solution the company really needs.

2. Project Management
Those who manage the project form a risk to the success of the project if they are inexperienced, have inadequate leadership and communication skills, unwilling or unable to develop contingency plans, and whose risk management plans are insufficient to ensure the success of a project.   Craig has experience as an instructional designer and holds a degree in law. The case does not relate any project manager experience on his behalf. This role is attributed to Louise. However, given the previous failure of the development of the training, Louise' experience may not have a positive impact on the current iteration. This is apparent in Louise's unwillingness to converse with the legal team to resolve the issue of the projects scope. This apparent lack of communication skills goes counter to Horine's (2017) indication that it is "the most important project management skill" (p. 26)

3. Risk Source Team
The third greatest risk for an instructional designer is the composition of the team. Although we may not think of stakeholders in outside organizations as part of the "team" proper, they oftentimes act as SMEs, content contributors, and/or pilot learners. According to Dick & Carey (2015), this makes them part of the instructional design team (except for the pilot learners who are not necessarily part of the team). What can compound the problem is your project may not be their full time job, so you become a competing priority with their daily business activities. Additionally, due to not establishing a work history, achieving cohesion, communication, and cooperation may be difficult. The instructional designer may be seen as an outsider, and trust building may take additional time.   The third greatest risk for an instructional designer is the composition of the team. Although we may not think of stakeholders in outside organizations as part of the "team" proper, they oftentimes act

as SMEs, content contributors, and/or pilot learners. According to Dick & Carey (2015), this makes them part of the instructional design team (except for the pilot learners who are not necessarily part of the team). What can compound the problem is your project may not be their full time job, so you become a competing priority with their daily business activities. Additionally, due to not establishing a work history, achieving cohesion, communication, and cooperation may be difficult.   The instructional designer may be seen as an outsider, and trust building may take additional time.

Top 3 Risks for Craig's project

Identified Risk # 1		Project Definition-Unrealistic objectives				
The expressed goal of the course is to "provide a proactive approach to product safety-one that would prevent lawsuits from happening" (Horine, 2017) for the entire company, in a one day training session. This goal is unrealistic in terms of the time allowed and the number of disparate learner groups being addressed.						
Probability	Probability Score	Impact	Impact Score	Total	Priority	
Has occurred. Will continue to occur until Craig has narrowed project scope to a realistic level.	10	Impact level is high, particularly if Craig's course development is based on the course Legal had previously created. It has already been proven that the content of that course, besides being unengaging, did not meet the needs of learners.	10	20	**Priority #1. High. Until objectives are leveled to coherent and realistic expectations, Craig cannot hope to create a product that will be well received by his customers.**	
1 being the least likely/impactful and 10 being the most likely/impactful						
Risk Response Options: As a high-risk issue for Craig, this must be addressed in hand with other occurring risk issues. At this time, no SME or learner group agrees as to the goals for the course, nor does Craig believe the time frame and a single course can meet the actual expressed learning needs of all groups. Some form of transference of this risk would help Craig. Before beginning work, he can recommend that Electron revise the project objectives to a more concrete form. From his initial interviews, he can recommend alteration of the objectives, including expansion of the learning period for individual groups. Failing this type of alteration of Electron's plans, Craig can make Acceptance of the consequences of this risk more explicit for the stakeholders: their learning needs may not be met by the course created.						

Identified Risk # 2	Changes to Project Objectives

The learning goal as described by Louise & and Stan was to "prevent lawsuits from happening." This is unrealistic and not measurable. Craig, Louise & Stan want their employees to be "more conscious of product liability in their daily behavior." This is an attitudinal goal as described in Dick & Carey - "[a]ttitudes are usually described as the tendency to make particular choices or decisions" (p.44). Later on, Stan confided in Craig that the engineers believed that they were already sensitive to product liability issues, a departure from the original project goal.

Probability	Probability Score	Impact	Impact Score	Total	Priority
Since the proposal is a draft copy, providing training for an unfinished product does not seem reasonable. However, if the company-wide product safety program was every solidified, then training to this new standard is possible. Although legal can advise against the draft program, they are not the decision makers. The probability of an accepted program within the five-week window is highly unlikely.	2.5	If the plan is accepted, and the company desires to shift training to the new safety program, then the impact is significant. It greatly changes the scope. The learning objectives increase and the individual audience increases. The likelihood of accommodating a massive shift in scope in a five-week period would not be feasible. The impact is very high.	8	10.5	Priority #2.

1 being the least likely/impactful and 10 being the most likely/impactful

Risk Response Options: Avoidance. At this point in time, Craig could not possibly meet the proposal by Stand for the following reason:
- 5 week time frame does not support new project objectives
- Draft plan has not been finalized. Providing a training plan for a program that will likely change throughout the project life-cycle is not wise

He can remind Stan that he was brought on to design material that was general in nature with the overall goal of making employees more mindful of liabilities. What he was proposing was outside the original scope. If the company decides that they indeed desire this type of training, then they would have to renegotiate the terms of the statement of work. Horine (2017) suggest that reducing the probability is more likely than reducing the impact. The impact would still be the same, but the likelihood of the changes would be significantly reduced, as the company would have to settle political turmoil surrounding the proposed training program.

Commented [AK17]: Or possibly, he uses this as a bargaining chip for more time—that is, he can say, given the allotted time, I will be able to do X, Y, Z. He can then go on to say, with additional time, I will be able to offer additional benefits in these specific ways…

Identified Risk # 3	Inconsistent Scope Definition

Craig is in a situation wherein the various parties are making distinct requests of the direction that the training should take. Stan presents him with a document that provides procedural information, hence verbal information, and that the training should simply focus on what they will do.

The legal team on the other hand prefers that the training be generalized. They are concerned with the internal standards and procedures being used as guidelines in litigation if they are more stringent than the current regulations.

The engineering team is looking for a training that will help them deal with day-to-day problems in a structured way.

Probability	Probability Score	Impact	Impact Score	Total	Priority
Craig will have to make a decision as to the scope of the training. He will have to deny the request of one or more of the parties.	5	Craig will have to say no to one of the three parties pulling the scope of the training in their direction of interest. Legal may not approve of the final product if they determine negative repercussions on future litigation.	5	10	Priority #3.

1 being the least likely/impactful and 10 being the most likely/impactful

Risk Response Options: Avoidance. Craig should change the project plan; reasons stated below.
- Five weeks is insufficient time to develop a design document for each scope and run it through the ID process.
- Craig can analyze the competing scopes and seek to fuse them while removing high-risk tasks.

There seems to be a limitation of Electron's executives' understanding of the ID process. The fact that Craig's tenure with them is at least the second iteration of the training implies that they did not take the initial training through the formative assessment phase. Craig has to ensure that they are aware of what it takes to complete the process. Given the short-term turnaround time, it is suggested that he confer with Stan and Louise to consider adding more time to the project in order to fulfill the ID process.

The Role of the Contract or Project Agreement

Craig's overarching challenges all stem from the fact that there appears to be no clear objectives for the training course he has been tasked with creating. All stakeholder groups have different goals and expectations. A contract or project agreement could go a long way towards clarifying the work Craig has before him.

For one, while Craig has been given wide latitude to investigate the needs of all stakeholders, and seek their input, and has been advised "legal would need to be consulted on everything" (Ertmer & Quinn, 2014, p. 205). It is unclear from the description if Legal is simply an influential stakeholder group, or have approval responsibilities for the project. A contract or project agreement would go a long way to clarifying this for Craig, which in turn would guide the two main options: create the course to the Legal's approval, or attempt to meet the broader needs of other stakeholder groups.

A contract would have further allowed Craig to negotiate the Project Schedule. While Louise outlines a rather short time period, with only two weeks for analysis and possible planning, Craig could have advocated for additional time for a larger project scope, including more in-depth analysis. Alternatively, Craig could have negotiated for just the analysis phase, and then allowed for a separate contract based on that analysis.

If Craig accepts the "one size fits all" mandate from "legal", and creates a single course that does not meet the other expressed needs of Electron divisions, then there is a professional risk to Craig. His reputation may be impacted if Electron does not think that the product he delivered was adequate-even if it was inadequate because of their own choices, then their dissatisfaction could lead to poor references for other potential clients as well as greatly minimize his chances of return work for Electron . Craig also has a choice to walk away.

Another option: From the limitations that Craig has encountered with Legal, it could be argued that he has actually been hired to "jazz-up" Legal's previous course. He could clarify the needs for that type of project and deliver a quality project on time.

Thinking Retrospectively-Outlining a Contract or Project Management Agreement

When deciding contract type, under the current case description, Craig might be better served by a Cost Reimbursable contract, which would mean less risk for him as the seller (Horine, 2017). Electron's unclear objectives for the liability course and internal company political disagreements would make a Fixed Price contract a far greater risk. The Agreement outline below is modified from an online example provided by Jeanette Brooks (n.d.) via an Articulate blog.

Course Development Agreement	
Project Description & Objectives:	
Course Name/ID:	Safety/Liability for Electron Corporation

Commented [AK18]: It's not uncommon for legal to approve various company documents, including ID materials, in order to avoid lawsuits.

Commented [AK19]: Absolutely—great point!

Commented [AK20]: Maybe, but would this be wise? With a budding career, what could be the consequences if Craig decides to do this?

Commented [AK21]: Great point—this could be a starting point. See what the previous training looked like and what might be useful…

Lead Course Developer:	Craig Gregerson
Project Manager:	Louise
Project Sponsor:	Electron Corporation
Purpose/background:	[[Describe why the project was initiated, the business need it's intended to fulfill, and the scope of the work involved. Craig is stymied by vague and contradictory input as to the business need the course will address. The Contract can clarify, for all parties, the scope of the project, as well as the process for changes to that scope, and who has final decision making authority for the sponsor.]]
Targeted learners:	[[While the entire company had been described as the target learning audience, contract negotiation could have clarified this further, and also allowed Craig to present why this may or may not be a good approach for the course.]]
Learning objectives:	This course will enable learners to: 1., 2., 3.,....[[Craig has encountered differences of opinion about the learning needs of Electron for the subject of Safety/Liability. Obtaining clearly stated learning objectives will go a long way towards understanding what aspects of expressed needs he will actually be able to meet with the course he is being hired to create.]]

Project Deliverables:

Components of this project/Project Plan:	[[Describe the instructional products to be developed:]] ● This would include the SOW including Learning Objectives ● This will further clarify exactly what Electron expects Craig to create ● This could be used to clarify the analysis that is needed prior to course creation. ● Craig could include all phases of the ID Process, reducing risk for the project (Horine, 2017), especially mitigating "Scope Creep".]]
Out-of-scope work:	[[Clarify any related materials that are not a part of the scope of the course. This would be where Craig finds final determination that the process needs expressed by Stan and the engineering divisions, for liability protocols and processes, is either in or out of the project.]]

Commented [AK22]: Here, you probably want to be more detailed. For instance, who is the point of contact? Also, what is a chain of command for resolving issues?

Possible constraints:	[[Expressed constraints include time expectation for the course, and the limited time to prepare the course itself. While not an explicit constraint, Craig's job is further complicated by the expanded needs he is discovering as he conducts his analysis.]]

E-Learning Course Development Agreement, continued

Project Milestone Dates:		**Reviewers:**
Project start:		[[List parties responsible for review and approval here.]]
Draft Course completed for review:		· [[Name]]*
		· [[Name]]
Reviewers submit feedback:		· [[Name]]
Beta version completed for review:		*Final approval required. [[In this section, Craig would have final determination as to Legal's authority for approval of the course, as well as clarify the input and approval roles of Louise and Stan.]]
Reviewers submit final feedback:		
Final Release:		

Success Measures:

[[Describe the outcomes-changed attitudes, behavior, performance-desired by course completion.
· Craig is hampered by the fact that Electron does not appear to have clear goals about how this company-wide liability training should impact their business processes. This section provides an opportunity for Craig to define measurable criteria for the course he creates, further clarifying the scope of the project.]]

Change Plan

[[Even as the objectives and scope are clarified, Craig is likely to encounter issues that may impact the scope of the project as defined in the contract. He would be further aided with a plan for communication of change needs, and a process for change approval.]]

Premature Contract Cancellation
[[Should Electron decide to terminate the project, they will be liable for all cost in development of produced deliverables in materials and production hours.]]

Ownership & Property Rights
[[All content developed is the express ownership of Electron. None of the content developed within this project will be repurposed or reused outside of Electron. Since this course contains sensitive cooperate material, the content should not be allowed to be reused outside of Electron. This should add a level of comfort to the legal team]]

Non-disclosure agreement
[[Craig should provide a level of assurance that he will not disclose internal company procedures. The legal team was very concerned that Craig was even shown a draft copy of a proposed plan. By having a non-disclosure agreement in place, Craig would be able to have access to need-to-know material, and make him a trusted assistant within the company.]]

Stakeholder Sign-off for Contract:	
I agree to the project as described above, and will provide support for its completion.	
[[Electron Rep]]:	Signature, Title, Date
[[Craig Gregerson]]:	Signature, Title, Date

(Brooks, n.d.)

> **Commented [AK23]:** Nice consideration of key elements

How did the assigned readings contribute to your assignment?

Electron is attempting to do too much too fast. The project is to affect the work of the company's employees in 16 countries. Craig is only given five weeks to produce the product as per Electrons executives. Keealy, Protheroe, MacDonald, & Vulpe (2008) indicate that this unrealistic effort is a result of not having set realistic goals and a pace suitable to accomplishing the success criteria. The authors warn of the risk projects take when the desire to produce outweighs quality. "Taking time to get things right before moving on to the next stage is crucial" (Kealy et. al, 2008, p. 42)

> **Commented [AK24]:** Maybe they based on the timeline given to Craig anyway

Craig seems to have a sense that he has taken on a project that needs more time to get it right. At the end of the case, he has more material then he needs and is characterized as being in a state of wherein he has not develop a schema of the content. This in addition to the result of his knowledge of the growing pool of learners in this project leads to the conclusion that the time constraint placed on the completion of the course is affecting Craig adversely.

Electron Corporation would likely benefit from a perspective that includes root cause analysis (RCA), as described by Rooney & Heuvel (2004), "a tool designed to help identify not only *what* and *how* an event occurred, but also *why* it happened (p. 45). There is no suggestion in the case that of the lawsuits Electron has been involved in that there was any attempt to understand process or design failures that might have contributed to the lawsuit, in the first place. While an RCA could be applied in more of a performance quality program, it could also serve to illustrate the actual training needs of the company, and the behaviors and/or attitudes that need to be changed via that training.

One crucial aspect of RCA is the indication the "data from people are the most fragile" (Rooney & Heuvel, 2004, p. 49). This would indicate that as Craig gathers information in his interviews with people he also needs to regard the information with a certain amount of distance of his own. It is quite possible that the teams that have expressed dissatisfaction with the previous legal training do not really understand the legal implications of the drafted safety program they have prepared. The fact that they have not presented it to legal, in the first place, lends credence to the idea that they have simply excluded the legal considerations from their perception of their internal needs.

Turk (2010) highlights two areas that are applicable in Craig's case: poor initial requirements and reluctance to say no to a client. Craig's case is plagued with poor requirements. First, no matter how well the training is conducted, he cannot reduce liability lawsuits to zero. Turk (2010) states that project requirements should be "feasible, attainable, achievable, and expressed in quantified terms that mean the same thing to everyone" (p. 54). Although zero is quantifiable and means the same to everyone, it is most likely unattainable. Electron should consider how many cases are in litigation and determine a target quality number that they can be satisfied with, and have this be the quantifiable and attainable goal. Additionally, the directed Craig to legal, but also wanted him to assess the training needs company wide. Craig's eagerness and inexperience may have caused the project to become too unwieldy for him. All changes require analysis to determine the overall impact of the project's schedule and budget (Turk, 2010). It is not exactly saying "no," it is more like saying "if…then." The project manager is able to present the true cost in terms of time, budget, and schedule to the client. It lets the client determine cost verses gain. What both Turk (2010) and Horine (2017) warn against is blind acceptance to any change, no matter how small. Additionally, both Turk (2010) and Horine (2017) suggest the project manager document the agreement for any changed between the client and project manager.

Horine (2017) was particularly helpful in understanding the nuances of the relationship between the buyer and seller and in the development of a contract or agreement. Horine's (2017) section on key contract element has greatly assisted our team in developing our contract outline. Additionally, his summary of contract types chart helped our team distinguish the advantages and disadvantages for both buyer and seller on the three common contract types: time and materials, fixed price, and cost reimbursable. According to Horine (2017), the seller is least at risk with a cost reimbursable. Additionally, a cost reimbursable provides the most flexibility. If Craig decided to go with the original goal and the project expanded, he may have to either eat the cost or walk away and renegotiate. If Craig had a cost reimbursable, then Craig's resources would grow with the scope. As a team, we decided to omit liability for failure to perform; however, it may be in Electron's best interest to have this element included before signing. This protects the buyer the most if the vendor fails to deliver.

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> **Commented [AK26]:** Reference the specific case we did—so, Dundis, etc.