

**Considering Interpersonal Factors, Controlling Project
Details, and Closing Projects
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Project Communications Proposals

Stakeholder Group	Interest in the Project	Information to be Communicated	Method of Communicating Information	Communication Frequency
Lompoc Technology Group Programming Team Bill Peters (PM)	<ul style="list-style-type: none"> - Designer of Odysseus - Want field engineers to adopt the software as design- - Makes claim about generation gap. 	Provide Lompoc with reports based on project definition, success criteria attainment, conflicts. Propose team integration meeting	<ul style="list-style-type: none"> - Initial f2f - Video Teleconferencing (VTC) for subsequent meetings. 	<ul style="list-style-type: none"> · Weekly communications
Carillon	<ul style="list-style-type: none"> · Developer of multimedia-based. Requires situational awareness for ongoing projects 	<ul style="list-style-type: none"> · Provide Carillon of all updates, changes to the project, Human Resources requests, and constraints 	<ul style="list-style-type: none"> · email - VTC 	<ul style="list-style-type: none"> · Weekly communications - Event driven
Field Engineers	<ul style="list-style-type: none"> · Users of the product (learners) 	<ul style="list-style-type: none"> · Attitude towards the use of the technology and preference of workflow process. 	<ul style="list-style-type: none"> · VTC (primary) - Teleconference (secondary) 	<ul style="list-style-type: none"> · Weekly meetings
David's Team	Interested in the overall success of the project in order to form a lasting partnership with either Lompoc or Dragon	Tasks completions Constraints Request for Change Request for support Instructional Design guidance	F2F when geographically permitted <ul style="list-style-type: none"> - VTC (Primary) - Teleconference (Secondary) - Continuous updates on preferred collaborative software, i.e. MS Project, Trello, etc.) 	Kickoff Meeting Weekly Status Reports Event Driven (major milestone, etc.)

Major Impacts on Communication Measures

Horine (2017) states “effective project communications are a bedrock aspect of project management.” (p. 291) Given that premise, however, with whom the project manager is communicating is a major factor in his style and frequency. A project manager is expected to communicate effectively with stakeholders, his team, other teams, and outside vendors. Some of the tools used may be in his control to decide, while others may not. Prior to making this decision, Horine (2017) suggests that the project manager take into consideration the relationship with the recipient(s) of the message and the potential sensitivity of the data in communications planning. (p. 247). In all cases, the phase of the project is a determinant in the frequency of communications.

Firstly, regard to the stakeholders; he should not impose his preferred method. Horine (2017) abundantly warns the reader and suggest that he inquire with the stakeholders as to their preference (p. 299). To this end, a stakeholder analysis is suggested as part of the communications plan (p. 245). Stakeholders, not necessarily homogeneous in their expectations of the project manager’s communications. According to Horine (2017), conducting this analytical work will “provide insights into the needs and motivations of stakeholders.” (p. 245). Hence, even the learning style of the sponsor or key customer has to be taken into account in the project manager’s communications with them (Horine, p. 299). Scope change, increased risks, change management, are all factors that have an impact on the PM’s communications with this group.

Once the project has been kicked off, secondarily, the PM has to implement the team communications plan. However, the imposition mentioned above of remains. Even though the PM has more control Horine (2017) suggests that the team’s preference of communications and collaboration tools be included in the norms (p. 297). Here, the phases of the project become factors in the frequency of the communications. In the beginning, there is usually a need for more frequent meetings to assign roles and responsibilities and then less frequent as tasks are being completed. However, there should be at least weekly scheduled meetings in this type of project scheme.

Horine (2017) also warns about the factors that affect communications within a project that has cross-border and cross-cultural dynamics; be it international or domestic, across distinct regions of the nation. Several issues that appear in this case; time zones, technical compatibilities, and potential cultural differences. Time zone solutions are based on anchoring the time on a definite location. Horine (2017) advice of referencing the city time has been utilized by EDCI 627 Group 4 since we came together on assignment number one. We have used EST and EDST. On projects whose team members are of different cultures, Horine (2017) suggest take more formal, “by-the-book” approach to the project in order to mitigate the impact cultural misunderstandings that may arise. (p. 296)

In terms of technical compatibilities, the geographic location is relevant at this juncture. Assuming that the team members are in developed nations, given modern

communication, the tools should be readily available to neutralize this barrier. A technical disparity, however, may be faced when communicating with team members in developing or underdeveloped nations where bandwidth maybe an issue for them. These limitations paradoxically imply a greater need for meeting frequency wherein strict adherence to the agenda is required.

For most of the communications, Horine (2017) suggest a natural style of communication. However, if it is a matter of conflict resolution, the PM should seek to aggressively resolve conflicts. There is also a change in the closing of the project.

Strategies to a communication plan

- Determine stakeholders' communications preference
- Get buy-in from stakeholders on aspects of the project
- Determine the preference of his team for collaboration and communications
- Develop project vocabulary
- Establish frequency of communication
- Set-up protocols for virtual meetings
- Make it easy (Horine, 2017, p. 246)
- use subject line effectively in email
- Be proactive
- Avoid surprises, doubt, and uncertainty (p. 244)
- Tailor his communications content to the needs of the audience.
- Clarify, question, verify.

Communicating Difficult Topics

One project aspect David must address is that his client set predetermined training needs without fully considering the complete situation.

Convince Sponsor of need for Needs Assessment

One communication strategy is to hold a kick off meeting with all interested stakeholder representatives. This should consist of all members from his team at Carillon, Dragone, and Lompoc Technology. Request should be made to Dragone to bring the field engineers and Bill Peters from Lompoc to bring a representative from the development team. Although David has already met with each of these entities separately, he has a good case to bring them together because they have not had a formal kick-off meeting yet. The goal of kick-off meeting should be:

One of Horine's (2017) seven principles of communications is to build relationships. In David's case, he has done a good job at building professional relationships with the stakeholders. He can reach a compromise with Dragone on conducting a needs assessment as part of the instructional design process, he gains valuable information from the field engineers,

and he has a positive interaction with Lompoc. Now he has the extra responsibility of any Project Manager to build inter-relationships between the stakeholders and bring them together. This is one of the twelve keys to a better leadership, to facilitate progress (Horine, 2017).

Once together, David needs to **ensure that the project is aligned**, especially since he was not involved in the project definition process (which was loosely completed by Dragone). This is also an opportunity to ensure that all members of the project are aligned.

In this case, due to the gaps discovered, David should not try to cover everything in one meeting. Horine (2017) recommends having several **mini-kick off meetings**. If David is successful in bringing everyone together, and is able to get the stakeholders to recognize gaps, goals, and potentials, then it might be worthwhile having that be the goal of the kick-off meeting. Other mini-kick-off meetings can tackle the details of how the project should move forward.

Responsibility for Issues Discovered

It may be simple to say that Dragone could have conducted the needs assessment; however, I think that with any roll out of new technology where some level of training would be required, I do feel like Carillon would be best suited for this role. Dragone should have brought Carillon on earlier to help synthesize the training within the project. Lompoc developed the work aides, which may be been an area more suited for Carillon. As a result, the engineers had difficulty with the help menu. If David’s team was brought on earlier, he and his team could have made this work aide a much better product.

In general, there were many assumptions being made. The engineers did not want to get blamed for bad data caused by new technology, so they preferred not to use it because if they produced reliable results from known-good technology, then they would not be blamed. The designers from Lompoc did not test their product in field conditions. What works in Lompoc’s “house” may not work in the beating sun of the Southwest, and the 20,000-foot drop introduces variables that Lompoc could not replicate in their workspace. For Dragone’s part, they also made assumptions about the field engineers, assuming them to be inflexible and set in their ways.

Communication Plan

Communications Strategies for sharing results
<ul style="list-style-type: none">• Strategy. Kick-off meeting - As mentioned above, David should hold a kick-off meeting with all stakeholders. To make this effective, David needs to set an agenda for the meeting so members will have an idea of what the project is and so the stakeholders will not feel blindsided by any of the results. The agenda should include the needs assessment results and project realignment. This will give the stakeholders a good

start and time to digest internal problems within their own groups. **Method.** All attempts should be made to make the kick-off meeting a face-to-face meeting in order to reduce lag time in video conferences, build trust, and show commitment (Horine, 2017). If Lompoc cannot make it since they are in California, then they could participate via VTC. The host should conduct a test run to ensure that video quality is adequate.

- **Strategy.** Horine (2017) identifies communications as the bedrock of effective project communications. If all goes well, the group will realize that there are many follow-on actions that need to be accomplished and that this project is cross organizational, so planning in stovepipes will most likely lead to failure. This means that different organizations need to stay abreast with their counterparts maintain situational awareness and unity of effort. **Method.** David should draft a proposed communications plan prior for the meeting. I may not have to be a final plan, but a template to get some commitment to communicate. The group should agree on the frequency of the meetings, the participating members in the meetings, and the setting (face-to-face, telephonic, VTC, etc.).
- **Strategy.** Every project needs to have clear direction. The project sponsor needs to provide clear direction, or if no sponsor, then the appropriate steering committee or change control board. It is recommended that whomever David interacts with from Dragone, it needs to be someone who has the authority to make decisions. He initially met with a human resource manager and marketing manager from Dragone. It is unclear if either one of these individuals have the authority to either make a change or request to make a change. With both hardware and software issues present, it is important that Dragone have a member or members present that can direct change. **Method.** It would be preferable to conduct a face-to-face meeting in order to gain trust and build relations. Additionally, the first meeting will discuss topics in generalities and speak directly to the assessment. David needs to present his findings to those who can make decisions about the project. If he presents findings to members from Dragone who do not have the authority, or whose job it is to ask for authority, then it is unlikely that change will happen.
- **Strategy.** Horine (2017) states that part of leadership approach, one of the five key principles to managing difference, is to make the stakeholders feel like they are being hear, valued, and understood. Additionally, make sure that they are included. As mentioned above, David needs to ensure that he is speaking with members from Dragone who can effect change. However, before he does that, he should include Lompoc in the information that he is going to present. Otherwise, Lompoc may feel blindsided and devalued. **Method.** Review the assessment finding with Lompoc prior to the Kick-off meeting. David is fortunate enough that he has already established rapport and he seems to be on good terms. A wrong turn for David is for him to express his thoughts of, “if only Dragone Drilling would allow me to close myself in a room for the next year, I could redesign the Odyssey software and make it the innovative solution that they envisioned” (Mann, Larsen, & Kinzi, p.235). Although

David is a highly awarded designer, he needs to act like a leader and work with Lompoc to develop a solution.

Strategies for gaining the client's cooperation in addressing concerns uncovered during the needs analysis

- **Communicate the “big picture.”** David needs to keep everyone on track by identifying the ultimate goal of the project, which is the consistent integration of new technology in field practice. With gaps identified, David should keep the stakeholders focused on the goal and not on previously made assumptions. The big picture is the successful rollout of a program that will provide an advantage in discovering the finite resources of petroleum. There critical vulnerability is implementing the use of new technology in the field. If the product is not used, then it defeats the purpose of investing money in the product. The problems have already been addressed - hardware issues and software issues. These issues need to be elevated and all other activities, such as developing additional training material, needs to be subordinated to the hardware and software issues. As Horine (2017) noted, the project manager needs to identify the critical success factor and use that as leverage to align everyone's priorities.
 - **Get buy-in.** There is plenty of buy-in for everyone. For the field engineers, learning and understanding new technology is why they came to America. The product should be sold to them as putting the engineers at the cutting edge of energy technology. For Dragone management, this is a significant investment. Current state is that the technology is not accurate due to hardware and software design flaws that could be fixed. Lompoc benefits by building its reputation. Lompoc is a newer company, having Dragone in their portfolio as a success story increases their reputation.
 - **Team integration.** David should recognize the strengths of all the stakeholders. Dragone Industry was flexible enough to allow him to conduct the needs assessment, which means that they recognize the value of working through a process or system and are amicable to change. Lompoc has built a culture that is focused on aggressively attacking projects. David noticed that all the designers were engrossed in their work and that there were sleeping areas available for overnights. What Lompoc calls their “house” is actually a full-time factory of productivity. If David could integrate his team, and even himself from time-to-time, then they could have a dedicated workforce to fix the software problems and provide the software engineers an instructional designer's viewpoint to create on-screen work aides. The program was not successful because it was not learner focused. This will help the team address navigation, online help, and screen color selection and functionality. This frees-up other assets to work on procuring a sun tolerance laptop screen and pulley system integrity.
 - **Identify and cancel Gold Plating.** There does not seem to be any positive benefits in time for using the “self-correcting” calibration in the new system. It does not save time at the work-site and the field engineers distrust it. Dragone could dedicate person-hours to this project, or if there were not anything to be gained from it, then

they would pass on trying to address this issue and concentrate energies to fixing other issues.

- **Applying Instructional Design Theory:** There are two sets of users, those who understand English and those who spoke English as a second language. Translating the software would most likely be a costly adventure and require hiring on a translator. Translating software exists; however, most are inaccurate when it comes complex ideas and jargon. Suggest mixed teams so that the learners can assist each other. This type of peer-to-peer learning may be more cost effective and provide the learners with the skills that they came to America for. In addition, it is not clear what language and how many languages need to be considered.

Delegating project tasks to other team members: David is fortunate enough that his assigned team members are proactive and professional. They are poised to be a great asset for this project. These members can integrate with Lompoc to and act as consultants to guide the project as well as share industry techniques.

- **Graphic Designer:** The graphic designer can assist Lompoc with re-developing the navigation page. This is the area where the graphic designer will most likely have the biggest impact and could develop a friendlier interface for the user.
- **Instructional Designer:** As the project manager, David cannot stay full time with Lompoc, getting into the minutia of instructional design and content management. He needs to assign instructional designers to Lompoc. *One instructional designer* can focus on the search engine. The *other instructional designer* can focus on the user guide. Lastly, David can designate one to handle administrative matters. This extra task is a mentorship opportunity for one of the instructional designers and frees up David from mundane tasks so he can focus on managing.
- **Software/interface programmers:** These three members have been developing software and interface programs in the instructional design field for years with a successful company, Carillon. Their input would be valuable to the members at Lompoc. One programmer could assist with the functionality effort. One programmer could assist with the Online Help. And one programmer could assist with the Navigation.
- **David:** David is the overall manager for his integrated consultant team with Lompoc. His members should be reporting to him for milestone completion and synchronization meetings. He should also be controlling the team's efforts since he has the most experience in the field.

Strategies of Project Control

- **Prevention**

Option 1-The Odyssey project would have greatly benefited from better development planning. The case implies that Dragone presented requirements to Lompoc Technology Group (LTG), LTG developed the software, and then only one beta test of the software was performed. Slight changes are still to be made, but none are being made that expressed user concerns. There is also no indication that users were consulted in the development of the software, which would usually be a high-level priority in software development of this kind.

Option 2- David would benefit from regular status meetings. These help “to keep everyone honest, accountable, and on their toes” (Horine, p. 141). David assumes that his team members work in the same manner that he does, “that he himself worked best when given wide latitude within general guidelines” (p. 232). There is no indication that David had shared the software deficiencies he discovered with his team prior to the two-week review. Designing an instructional product for a system that is known to be difficult is vastly different than designing for an easy to use system. The case implies that the designers had done a lot of really good work on the interface. While they are only two weeks in, they may yet have to scrap that work.

It would seem that Dragone would benefit from regular status meetings, as well. For David to discover that the Odyssey software developers believed that “it might take a new generations of engineers” (p. 233) does not bode well for the project for Dragone. Quite the contrary to their observation, some of the beta testers were new to field engineer work and are the new generation, so this assumption is false. Additionally, to have so many beta testers abandon the tool, and to see no indication from the programmers that they were addressing user concerns implies that there were not regular status meetings before Carillion was brought in.

- **Detection**

This project would have benefited from at least a set baseline for the adopt-ability of the software. A certain standard for acceptance in beta testing would have allowed for review of work and determination if the product was actually working as intended. To have a 100% abandonment rate, as implied in the case, indicates that requirements were weak. It appears that Dragone has no criteria by which to judge the work that LTG has done. Their insistence on pushing Odyssey to market in three months, with the goal of “transforming” the industry belies any understanding field reaction to beta testing. Dragone is selling the product as a solution for engineers in the field, replacing older but reliable systems. A minimum threshold for user acceptance should have been set.

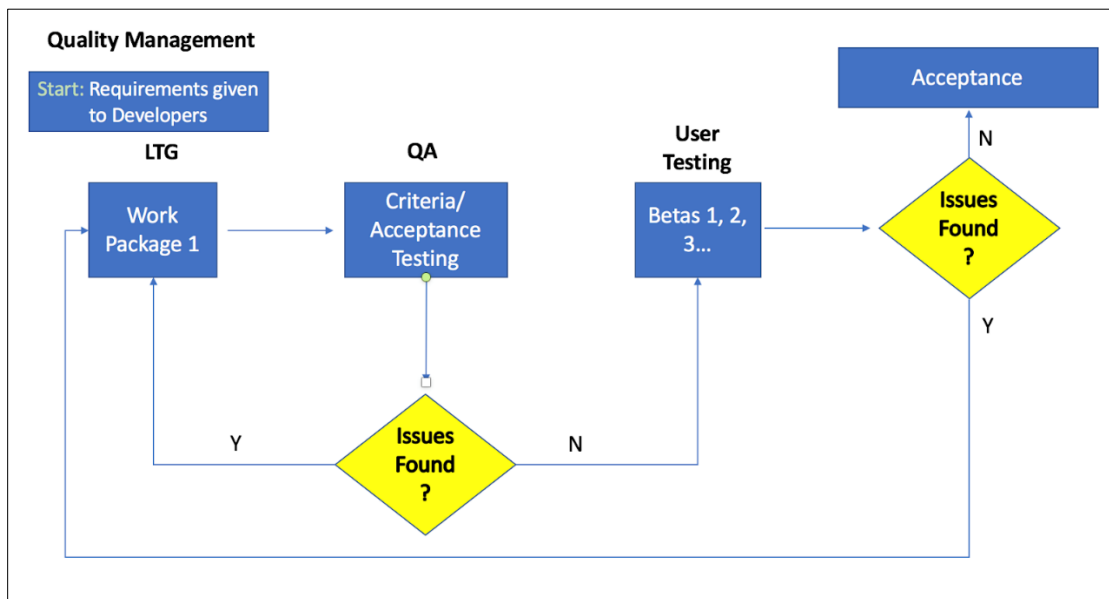
- **Action**

Implementation of Quality Management, with an Independent QA auditors, both for the network setup and user interface, would have allowed for corrective action during the

development process. It is indicated that beta users encountered many networking issues, and LTG was still working to solve login issue. A quality auditor, which implies a control setup for testing functionality, could have discovered these issues well before beta rollout. A quality auditor testing the User Interface could have provided invaluable feedback, alerting the designers, or at least the Dragone Project Managers, that the UI, as designed would hamper adoption of the Odyssey system.

Graphic Example of Quality Management

A Quality Management Process System, ideally, will have independent testers testing against specific user requirements. They find issues, and report these back to the developers. The developers fix those issues and send the product back to the testers to confirm fix. This cycle continues until the product is stable enough for a beta release with users. If users find issues (either bugs or usability) during beta tests, these are reported to the developers to fix, and the QA testers again confirm fixes. This quality management process can be used in both the software development life cycle, and throughout the development of the instructional design product.



Post-Project Review- Lessons Learned

David needs to consider that not everyone works the way that he does. He assumed his team members preferred little guidance. Not everyone works this way, and he has no apparent plans to accommodate different working styles or to provide guidance. He would benefit from fostering team collaboration, not just within his own team, but by having his design team work with Lompoc’s software developers. This would “encourage knowledge sharing and reduce risk around “isolated pockets of expertise”” (Horine, p. 281).

During the needs assessment, David is seriously bogged down in the apparent deficiencies of the Odyssey software system itself. His experience as subject matter expert in his previous work allowed him the luxury of intuitively knowing the subject matter and audience. With the strategies proposed, he would be able to address his functionality concerns.

However, he would also be served by thinking about a “backup plan”, should Dragone/Lompoc decide to forgo his proposed strategies, by also considering what would need to be provided for the Odyssey system. It is, after all, what Carillion was hired for. They did not hire David to evaluate its potential for effectiveness in the field. He could have considered the project another way. What would Carillion’s project deliverables be if they had been hired after the development and release of the software had been completed? Knowing that absolutely no changes could be made to the software, he is charged with creating a learning system for the software, *as it is*. And this would be David’s lesson. To deal first and foremost with the project that is actually in front of him.

Post-Project Review Outline

Topic	Data Collection Methods
GAP Analysis	
<p>How closely do project deliverables match the original objectives for the project? If there are gaps, how will these be closed?</p>	<p>Documentation review. Surveys and interviews</p>
Were Project goals achieved?	
<p>Do the training materials function as expected? What type of ongoing support is needed for training? If there are problems here, how will these be addressed? Does the instructional material adequately train users? How does the end result compare with the original project plan, in terms of quality, schedule and budget?</p>	<p>Surveys and interviews Consider Independent Reviewers for objective perspective.</p>
Stakeholder Evaluation	
<p>Were the end users' needs met? Is the project sponsor satisfied? What are the effects on the client or end user? If key individuals aren't satisfied, how should this be addressed?</p>	<p>Clarify objectives for the review so that intentions are clear. The review is about improvement, not placing blame. Consider Independent Reviewers for objective perspective.</p>

Determine the project's costs and benefits.		
<p>What were the final costs?</p> <p>What will it cost to operate the solution?</p> <p>What will it cost to support the solution in the future?</p> <p>How do the costs compare with the benefits achieved?</p> <p>If the project hasn't delivered a sufficiently large return, how can this be improved?</p>	<p>Document estimated costs and final costs. Consider Independent Reviewers for objective perspective.</p> <p>Document the estimated cost savings. Gather data on field cost savings after deployment.</p> <p>Collect and review documentation to extent commiserate with project type and size.</p>	
Further Development Needs		
<p>Have all of the expected benefits been achieved? If not, what is needed to achieve them?</p> <p>Are there opportunities for further training and coaching that will maximize results?</p> <p>Could you make further changes, which would deliver even more value?</p> <p>Are there any other additional benefits that can be achieved?</p>	<p>Interviews with field engineers. Cost comparisons.</p> <p>Consider Independent Reviewers for objective perspective.</p>	
Identify lessons learned.		
<p>How well were the projects deliverables assessed, and how well were timescales and costs assessed?</p> <p>What went wrong, why did these things go wrong, and how could these problems be avoided next time?</p> <p>What went well, and needs to be learned from?</p>	<p>Interviews with Stakeholders</p> <p>Review key project documents.</p> <p>Consider Independent Reviewers for objective perspective.</p>	<p>Include Scope lessons</p> <p>Time/Schedule lesson</p> <p>Cost/Resources Lessons</p>
Report findings and recommendations.		
<p>What lessons have you learned that need to be carried forward to future projects?</p>	<p>Summarize and Recommend for Scope, Schedule, Cost</p>	

(Adapted from Mind Tools, 2017)

Impact of Assigned Readings

Horine (2017) work was very useful in considering this project. At one point, David realized that he needed to re-address the project as a whole. The positive aspect of the project was an innovative and groundbreaking technology had been developed and addressed an industry concern. The negative aspect was that there were design conditions that did not make it user friendly. Horine's (2017) section of managing expectations was helpful in considering how David could drive his approach developed from the needs assessment to bolster and potentially secure the overall success of the project. Horine (2017) explains several principles that are helpful in David's situation, some of which are noted above, but include identifying critical success factors and project impact, communicating the overarching goal and keeping the team focused on that goal, attain buy-in, and leveraging the Kick-off meeting. Horine (2017) chapter on managing differences also notes kick-off meetings as being essential to cross-organizational projects. Some information that was mentioned in Horine (2017) is probably well known, but maybe poorly practiced. For example, ensuring that communication equipment is in working order.

Horine (2017) was very helpful in understanding how to handle differences amongst people, technology, and working environment. He takes one of his principles, that of over communication, and reminds the reader in various locations of the importance of the communications plan. He labels it as "the bedrock" (p. 291). Horine provides what five principles to help project managers handle the differences in location, business function, or cultural considerations that may place the project in a risky position of not meeting the success criteria established in the project definition document.

Closing out a project is much more than just a handshake as illustrated in a graphic placed in my chart on a previous assignment. Horine (2017) reminds the reader of the formal process by which project closeouts have to be conducted. Horine (2017) provides three key principles and a checklist of thirteen steps to use. David, in his transition of the final product to Lompoc should express his concerns about revising the product based on knowledge he gained throughout the project.

Substantially important in the Horine (2017) list of closing actions are the financial related elements; developing the financial reports and closing the accounts and charge codes. In the world where corruption and mismanagement of funds is fodder for news, ensuring that these fund related components of the project are properly closed is critical to the PM's reputation and possibly that of the sponsor, stakeholder, and project. A 2012 study of usage of World Bank funds found criminal fraud in "157 contracts worth about US\$245.1 million, or an average contract size of US\$1,592,000" (Alexander & Fletcher, 2012). The study dealt with contracts concerns in 54 projects in 33 countries.

The Harvard Business School Press (2006) provided useful information on the management of team members. Both Harvard Business School Press and Horine (2017) introduced a principle from Steven Covey's book *Seven Habits of Highly Effective People*, and that is to push tasks down to the lowest level. This frees up managements job to manage. David could benefit from this approach since he is surrounded by a capable and ready

force. Harvard Business School Press (2006) also mentions other tips that could help this situation, such as use members for their strengths and challenge those in the staff to develop their skills for future projects. If David is going to continue to manage this group in future projects, he should be looking for opportunities to challenge and develop his members.

Anantatmula (2010) reinforces principles in Horine's (2017) work and backs-up those principles with field research. The specific principles are: "define roles and responsibilities, communicate expectations, create clarity in communication, establish trust, employ consistent processes, facilitate support, and manage outcomes" (Anantatmula, 2010, p. 17). Anantatmula (2010) shows the relationship between the principles; by establishing clear communications and assigned roles, the members will produce trust within the employees because they would have clear expectations and a consistent process to guide their work. This now becomes an issue for David. Against his better judgement, he started to develop content before analyzing the learners and context. Because David did not know the needs to the project, he could not provide his team with clear direction. This will now cause the team to conduct re-work and maybe cause frustration with David's leadership.

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