

Statement of Work (SOW)

Designing an Electronic Performance Support System (EPSS)

for

WidgetMart

2345 London Avenue
London, NJ 00001

March 10, 2013

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WidgetMart

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Company Background

WidgetMart is the nation's largest discount widget retailer with 5,000 stores throughout the United States, Puerto Rico, the U.S. Virgin Islands, and Canada. WidgetMart is comprised of three related stores:

- ◆ WidgetMart – sells high quality widgets at affordable prices in self-service stores
- ◆ Universal Widgets – caters to the upscale widget market
- ◆ BuyMore – a leased sales operation with department space in large retail stores

Prior to 1979, WidgetMart associates were trained on the best practices of the day-to-day operations of the company by pairing up with experienced managers and district supervisors and spending 6 to 18 months with them. This form of training however, created numerous problems for the company. The two notable problems were 1) procedures were *inconsistent* among the stores, and 2) information became *unreliable* as it traveled from trainer to associates in one store to trainer to associates in another store, also referred to as “information degeneration.”

These problems became prominent in the 1980's during the company's explosive growth. As a result, a company wide standard was adopted and a best practices operations manual developed. This manual became the “foundation” for which workshops and paper-based, self-paced training materials were conducted. This solution however, was not efficient; the operations manual and the training materials were organized differently and difficult to reference the training materials to the operations manual and vice versa. Additionally, updates to the manual only incorporated the addition of new information but no deletion of old information, resulting in the accumulation of massive amount of information that was obsolete. Between 1994 and 1995 the company started replacing its outdated computers with more sophisticated computers consequently, leading to the decision to overhaul the existing training and performance support system and transitioning to a fully online integrated Electronic Performance Support System (EPSS).

Scope of Work

The purpose of this project is to develop an Electronic Performance Support System (EPSS) that seamlessly integrates the existing training materials and the best practices manual of the day-to-day operations in a consistent, accurate, up-to-date, and relevant manner across all the three stores, in all the countries, and in all the applicable languages. Moreover, the online materials of the EPSS must be easily accessible to all associates as needed, and just as easy to update. The scope of work for designing the EPSS includes:

1. Identifying and discarding obsolete information (data) in the existing system
2. Identifying the information (data) that needs to be converted to the EPSS
3. Categorizing this information into four functional areas:
 - 3.1. Applications with embedded knowledge
 - 3.2. A reference function
 - 3.3. A job aid function
 - 3.4. A computer-based instruction function
4. Testing of the new system
5. User training of the new system

Not included in the scope

1. Development of a prototype of the EPSS prior to full roll-out
2. Ongoing system maintenance and technical support post roll-out of the EPSS

Objectives/Deliverables

The following is a list of the expected deliverables:

1. Project kickoff meeting (with relevant stakeholders)
2. Produce a detailed, formal documentation of requirements for the EPSS
3. Requirements review with clients/stakeholders
4. Obtain approval for the requirements
5. Contractor (programmers, analysts) procurement
6. Create a detailed project plan
7. Review project plan with stakeholders and obtain approval
8. Implement Phase 1 - Applications with embedded knowledge including the testing and user training
9. Implement Phase 2 - A reference function including the testing and user training
10. Implement Phase 3 - A job aid function including the testing and user training
11. Implement Phase 4 - A computer-based instruction function including the testing and user training

12. Implement Phase 5 – Integration of phases 1 thru 4, including the testing and user training
13. Obtain acceptance sign-off from clients/stakeholders
14. Conduct a “lessons learned” session
15. Formally close out the project

Engagement Resources

Davey Jones, Project Manager

- ◆ Has worked at WidgetMart for ten years performing various roles including technical writer, trainer, and instructional designer (without formal instructional designer training). He is also an expert in computer interface design. He will be the Project Manager for the EPSS project.

Ellen Garak, Merchandising Consultant

- ◆ Designed most of the business applications that would be incorporated into the EPSS. She will also take on some of the project’s administrative responsibilities.

Josie Bashir, BuyMore Training System Consultant

- ◆ Worked on the acquisition team for Universal Widget. Expert in the variations in the information required for WidgetMart, Universal Widgets, and BuyMore.

Tim Sisko, Translation Expert

- ◆ Understands the variations needed in the information from country to country to account for customs, language, and governmental requirements.

Barry O’Brien, Marketing and Change Management consultant

- ◆ Newest team member. Experience in management development and interpersonal skills.

Assumptions

1. Client in this SOW is defined as WidgetMart. However, the scope includes all WidgetMart related stores: WidgetMart, Universal Widget, and BuyMore.
2. Team members will be fully dedicated to the project (full time) until its completion.
3. Overtime will be authorized if and when deemed necessary.
4. System developers (programmers and analysts) will be contracted for the project since there are no in-house employees with the required expertise.
5. Clients will not request, at any point in the future, for the discarded information
6. Project team members are authorized to travel, as needed, to and from other stores of WidgetMart, including internationally.
7. Rollout of the EPSS will be conducted in five phases:
 - 7.1. Phase 1 – Applications with embedded knowledge

- 7.2. Phase 2 – A reference function
- 7.3. Phase 3 – A job aid function
- 7.4. Phase 4 – A computer-based instruction function.
- 7.5. Phase 5 – Integration of phases 1 thru 4

Note: testing and user training will be conducted in each phase of the rollout.

Constraints

1. There are no team members representing – loss prevention, retail operations, human resources, scheduling, and inventory tracking aspects of the store operations. The existing team members will need to fill these roles; which will require a learning curve and potentially impact the completion target date of the project.
2. No one on the team has a formal training in instructional design. This could result in poor quality and ineffective training materials design for Phase 4, the computer-based instruction function.

Period of Performance

The work in this SOW shall commence on July 1, 2013, and shall continue through June 30, 2014.

Place of Performance

All work will be performed on premises at WidgetMart main location. However, travel to the various stores will be necessary throughout the project life cycle.

Estimated Budget

This work will be conducted on a Time & Materials basis. The budget allocated for the design of the Electronic Performance Support System pursuant to this SOW shall not exceed \$700,000. The project manager will outline a detailed cost in the master project plan for review and approval by the Client.

Out-of-Pocket Expenses / Invoice Procedures

Out-of-pocket expenses incurred by the project team while travelling to and from other sites will be charged back to the project's fund. The project team shall follow the respective organization's expense invoice procedures for reimbursement.

Completion Criteria

The project shall be considered complete when any one of the following first occurs:

- ◆ All the activities within this SOW, including delivery to Client of the materials listed in the Section entitled “Objectives/Deliverables,” and Client accepts such activities and deliverables without unreasonable objections. No response from Client within 2-business days of deliverables being delivered by the project team is deemed acceptance.
- ◆ Client cancels the project or deliverables not yet provided with 20-business days advance written notice to the project manager.

Project Change Control Procedure

The following process will be followed if a change to this SOW is required:

- ◆ A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the project.
- ◆ The designated Project Manager will review the proposed change with the project team and issue approval for feasibility investigation/analysis to determine the impact on this SOW budget, schedule and other terms and conditions of the Agreement.
- ◆ Upon completion of the investigation, both the Client and the project manager will review the impact of the proposed change and, if mutually agreed, a Change Authorization will be executed.
- ◆ A written Change Authorization and/or PCR must be signed by both the Client and the project manager to authorize implementation of the investigated changes.

Client Responsibilities

The Client will be available or designate a representative for project meetings and/or issue resolutions.

Agreement/Signatures

The parties hereto have caused this SOW to be effective as of the day, month and year first written above.

Signature: _____
Name: Jon Luc Picard
Title: WidgetMart CEO

Signature: _____
Name: Davey Jones
Title: WidgetMart Project
Manager

Signature: _____
Name: Kira Nerys
Title: Universal Widget Director

Signature: _____
Name: Jadzia Dax
Title: BuyMore Widget Director

Rationale Statement

Case # 25 – Designing an Electronic Performance Support System for WidgetMart (Ertmer & Quinn, 2007)

The Statement of Work (SOW) for WidgetMart is the “written confirmation” (Portny, Mantel, Meredith, Shafer, Sutton, & Kramer, 2008, p. 42) of what the designing of the Electronic Performance Support System (EPSS) project will produce. The SOW also indicates the “terms and conditions under which the project team will perform the work.” (Portny et. al., 2008, p. 42). Among the terms and conditions in WidgetMart’s SOW are assumptions and constraints. One of the major assumptions noted in this case is the phased approach to the design project. This project is considered a “Platform Project” (Portny, et al., 2008, p. 19), the outcome representing a “major departure” from existing processes; in that, all the learning materials and the best practices manual of day-to-day operations will completely be transformed to an online format. And therefore, the phased approach is recommended to effectively transfer to the online format. Additional benefits to this approach include the gradual introduction of the EPSS and its processes to the company associates (employees), and the assurance that at least one functionality will be available until the remaining functions of the system are completed; i.e., employees do not have to wait until the entire system design has been completed to utilize the system.

The SOW also lists constraints that have potential impact on the success of the project. A primary constraint noted is the lack of formal instructional design training among the project team members. Effective instructional (training) design requires a carefully planned systematic approach, taking into consideration factors such as, content selection and sequencing, formative and summative evaluation, learner characteristics, and the environment and the technology for the situation. (Simonson, Smaldino, Albright, & Zvacek, 2012). Although Davey Jones has informal experience in instructional design he lacks a formal training on the principles and theories of instructional design. The SOW notes this issue as a constraint to indicate that the quality and effectiveness of the training materials in the new EPSS may not be sufficient.

The Scope of the SOW further makes it clear to all involved parties what *is* included in the project as well as what *is not* included so as to minimize any misunderstandings of the expected outcome.

References

- Ertmer, P. A. & Quinn, J. (2007). *The ID CaseBook. Case Studies in Instructional Design*. Upper Saddle River, NJ: Pearson Education, Inc.
- Portny, S. E., Mantel, S. J., Meredith, J. R., Shafer, S. M., Sutton, M. M., & Kramer, B. E. (2008). *Project Management: Planning, scheduling, and controlling projects*. Hoboken, NJ: John Wiley & Sons, Inc.
- Simonson, M., Smaldino, S., Albright, M., & Zvacek, S. (2012). *Teaching and Learning at a Distance: Foundations of Distance Education*. (5th ed.). Boston, MA: Pearson Education Inc.

Note:

SOW template is courtesy of www.ProjectManagementDocs.com, free project management templates, and has been modified to fit the WidgetMart EPSS project.