Project Scope

Designing an Electronic Performance Support System (EPSS)

for

WidgetMart

2345 London Avenue
London, NJ 00001

March 24, 2013

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WIDGETMART
PROJECT SCOPE

Project Background and Description

The purpose of this project is to develop an Electronic Performance Support System (EPSS) for WidgetMart 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.

Project Scope

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. Testing of the new system
4. User training of the new system

Specific Exclusions from Scope

The scope excludes the following:
1. Development of prototype of the EPSS prior to full roll-out
2. Ongoing system maintenance and technical support post roll-out of the EPSS

High-Level Requirements

The re-designed EPSS must include the following four functional areas:
1. Applications with embedded knowledge
2. A reference function
3. A job aid function
4. A computer-based instruction function

Deliverables

The following is a list of the expected deliverables:
1. Project kickoff meeting (with relevant stakeholders)
2. Create 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

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 within 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.

3. WidgetMart has stores in several countries, with several different languages, customs, government regulations and policies. The team has only one translation/language expert. This could impact both the project schedule and the accuracy of the end result. The translation expert can only travel and meet with country representatives one at a time. It may be necessary to recruit additional translational/language experts.

Affected Business Processes or Systems

The training and day-to-day operational processes of all three WidgetMart stores: WidgetMart, Universal Widgets, and BuyMore are impacted by the EPSS design project.

Implementation Plan

The EPSS design will be implemented in five phases:

1. Phase 1 – Applications with embedded knowledge, including the testing and user training for the phase
2. Phase 2 – implementation of a reference function, including the testing and user training for the phase
3. Phase 3 – implementation of a job aid function, including the testing and user training for the phase
4. Phase 4 – implementation of a computer-based instruction function, including the testing and user training for the phase
5. Phase 5 – integration of phases 1 thru 4, including the testing and user training for the phase

High-Level Timeline/Schedule

The project target start date is May 1, 2013. Completion of the project is targeted for February 28, 2014. Below is the high level schedule by phase:

- Phase 1 – October 2013
- Phase 2 – November 2013
- Phase 3 – December 2013
- Phase 4 – January 2014
- Phase 5 – February 2014

Approval and Authority to Proceed

We approve the project as described above, and authorize the team to proceed.

Name	Title	Date
Jon Luc Picard	WidgetMart CEO	March 24, 2013
Kira Nerys	Universal Widget Director	March 24, 2013
Jadzia Dax	BuyMore Widget Director	March 24, 2013

Signature: _____

Date: _____

Signature: _____

Date: _____

Signature: _____

Date: _____

Rationale Statement

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

Project Scope according to (PMBOK Guide, 2008, p. 436) is "The work that must be performed to deliver a product, service, or result with the specified features and functions." The Project Scope Statement (document) for WidgetMart is a description of the work to be performed in designing the Electronic Performance Support System (EPSS). Included in the description are assumptions and constraints, deliverables, timeline, businesses/processes impacted, and high-level requirements.

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, Mantel, Meredith, Shafer, Sutton, & Kramer, 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 Project Scope 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 skills 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 Project Scope 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. Additionally, Davey Jones is the project manager assigned to the project and may not be able to devote the time required for the training development aspect of the project. Considerations should be given to hire a training specialist for the project.

The Project Scope further makes it clear to all involved parties what *is included* in the project as well as what *is excluded* so as to minimize any misunderstandings of the expected outcome. The project scope identifies Processes and/or business systems impacted so the affected organizations can be prepared for the change. The schedule/timeline indicated in the scope are "best-guess" estimates. As the project develops further a more accurate schedule/timeline will be provided.

References

Ertmer, P. A. & Quinn, J. (2007). *The ID CaseBook. Case Studies in Instructional Design.* Upper Saddle River, NJ: Pearson Education, Inc.

PMBOK Guide (2008). A Guide to the Project Management Body of Knowledge (PMBOK® Guide). (p. 437). 4th ed. Newton Square, PA: Project Management Institute, Inc.

Portny, S. E., Mantel, S. J., Meredith, J. R., Shafer, S. M., Sutton, M. M., & Kramer, B. E. (2008). (p. 19). *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:
Project Scope template is courtesy of www.ProjectManagementDocs.com, free project management templates, and has been modified to fit the WidgetMart EPSS project.