

Learning & Development Project Process

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INTRODUCTION

This document provides explanations of each step in the Instructional Designer (ID) Learning Development Process.

This process is designed to address learning development requests only.

- **Short-term projects**, such as QRGs, meeting presentations, or other non-Learning requests do not require the level of analysis and approval found in this process.
- **Long-term Learning Projects**, such as major organizational change initiatives, may require more consideration than is found in this process.

This process is designed solely to represent the typical development request managed by Instructional Designers (IDs) in the Learning & Development (L&D). All components of this process should be considered in light of the business goals for each Learning Project, and included or excluded to meet the true needs of Discount Tire.

ROLES

Specific individuals assigned to the following roles for the Learning Project are identified during the Intake and Analysis Phases, and documented in the Project Plan.

L&D Roles

Role	Description
Project Lead	The person responsible for L&D involvement (training, communications, support, reporting) in the Learning Project. Works with customer to ensure that Learning Project aligns with the Business and to define requirements for success.
Performance & Learning Advisor	The person responsible for performing needs analysis on incoming projects approved by L&D Management Team. Also responsible for presenting the needs analysis results to L&D Management Team.
Project Manager	The person responsible for planning and successful execution of the Learning Project; manages risks, issues, changes, and key decisions.
Lead Instructional Designer	The person with primary instructional design responsibilities for the project.
Instructional Designer(s)	Other instructional designers assigned to the Learning Project.
Lead Developer	The person with primary development responsibilities for the project.
Developers	Members of the Development team assigned to the Learning Project, responsible for creating graphics, videos, online modules, and other deliverables for the Learning Project.
Learning Officer	L&D executive final approval
Logistics	Member(s) of the Logistics group involved in the Learning Project.
Communications	These people are responsible for handling communications for Learning Projects.
L&D Management Team	Learning Officer, Dept. Managers, and Project Manager.
KC	These people are responsible for conducting impact analyses and decommissioning obsolete items.

External Roles

Role	Description
Customer / Requester	The person who requests the learning project. May be the Sponsor, Executive, or Subject Matter Expert.
SME	Subject matter expert(s) in the business segment; primary contact for content (tasks and knowledge); responsible for content review
Sponsor	The accountable leader in the business segment for this project, responsible for scope review
Executive	The executive responsible for final approval
Legal	Person from the Legal Department responsible for Legal review
OCM	Person from the OCM department responsible for Impact review
Security	Person from the Information Security department responsible for Security review
End User	Individual(s) who represent the target audience, responsible for Customer Experience review

ID PHASES

The Instructional Design process is based on ADDIE, and is divided into six phases, plus an External Review sub-process.

Phase	Purpose/Activity	Deliverable
Intake	Notification and initial analysis of a new Learning Project	Project Intake Form, Project Plan
Analysis	Deep-dive analysis with the Training Plan as a deliverable	Training Plan
Design	Develop course structure, content and step-by-step details. Includes storyboard, script and talking points for meeting with developers.	Course Outline, plus Design Plan or Lesson Plan
Development	Creation and Internal Review of all learning, evaluation, and supplementary materials	Training materials
External Review (sub-process)	External Review and approval of materials	Review Log
Implementation	Execution of the learning plan	Feedback, Reports
Evaluation	Gathering and analyzing evaluation data with the Project Summary as a deliverable	Project Summary

Intake Phase

The Intake Phase starts when L&D receives a new request.

Deliverable: Project Intake Form, Project Plan

Interactions with the customer during this phase should be Inviting, Easy, and Safe. We should inform the customer that the next phase of the process will be an analysis of their business needs.

Stage	Who	Does What
1	Discount Tire Customer	Fills out and submits the Project Intake form in ServiceNow.
2	L&D Management Team	Meets weekly to review new requests. If the request is approved, they will assign to Project Lead, Performance & Learning Advisor, Lead Instructional Designer, and Project Manager (who may or may not be the same person) to the project.
3	Performance & Learning Advisor / OCM	Will perform the needs analysis and present results to L&D Management Team.
3	A member of the L&D Management Team	Meets with the assigned Project Lead, Lead Instructional Designer, and Project Manager to discuss the request, likely resource requirements, scheduling / timeline, and to determine next steps.
4	Project Lead	Completes the Project Intake form in ServiceNow, based on information available from L&D Mgmt team, customer, or other available source.
5	Project Manager	Starts a project plan ¹ , and includes relevant information from the Project Intake form and meeting with L&D Management.

¹ **Note:** Changes to the project plan will occur throughout the Learning Project. The Project Manager keeps the project plan up-to-date and informs all impacted parties when changes occur.

Analysis Phase

The Analysis Phase continues the work started during the Intake Phase.

Deliverables: Project Plan, Training Plan, Measuring Success Plan

It is the Lead Instructional Designer's job to gather the information needed to do a thorough analysis while making sure that our conversations with customers are comfortable and easy for the customer. Whenever possible, meetings should be conducted in person or by phone, rather than via email or forms/documents.

If additional Instructional Designers are assigned to this Learning Project, they will usually be brought into the project during this phase and will work closely with the Lead Instructional Designer.

Stage	Who	Does What
1	Lead Instructional Designer	<p>Determines what type of Analysis is needed:</p> <ul style="list-style-type: none"> • Basic Learning Analysis • Learning Needs Analysis (<i>for performance or skill gaps</i>)
2	Project Manager	<p>Ongoing:</p> <p>Plans project and records in the project plan, to ensure that all roles are assigned, risks and issues are identified, and project-related tasks identified and organized. Coordinates and leads team meetings, and performs other project management tasks.</p>
	Project Lead	<p>Plans for Evaluation phase and records information in the Measuring Success Plan:</p> <ul style="list-style-type: none"> • Determines what type of data will be needed. • Identifies the date(s) that the Evaluation data will be collected and analyzed. • Works with Logistics to develop Evaluation plan.
	Lead Instructional Designer	<p>Performs necessary analyses to ensure that our Learning Project meets the Customer's true needs and records in the Training Plan. Analysis generally includes:</p> <ul style="list-style-type: none"> • Determining constraints • Analyzing learners • Interviewing SME(s) • Listing and analyzing tasks and subtasks • Working with Sponsor to prioritize tasks and determine scope (what will/will not be trained) • Working with OCM to identify potential business impacts • Working with Legal to identify potential legal issues • Working with Information Security to identify potential security issues or impacts • Making recommendations for training and learning strategy if possible, ID offers several choices. <p>Works with Sponsor and SMEs to ensure their concerns and preferences are listened to, that they understand the training and learning strategy recommendations and feel comfortable with them.</p>
	Lead Developer	Set up a meeting to ensure results of Analysis are communicated.
3	Project Manager	Schedules and leads an internal (L&D) team meeting with the L&D Learning Project Team, Instructional Designers, Developers, Logistics, and Communications, to explain project and get feedback and recommendations. OCM / KC
4	Project Lead	Reviews and approves the Project Plan and Training Plan.

5	Learning Officer	Reviews and approves the Project Plan and Training Plan, and selects the training strategy. (If needed, works with Governance to determine training strategy and obtain approval.)
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Design Phase

The Design Phase begins with an approved Project Plan and Training Plan.

Deliverables: Project Plan, Training Plan, Course Outline, Design Plan/Lesson Plan

The Design Phase should continue to be an easy experience for the customer during the review and approval steps, which can be as simple as asking for their comfort level to discuss in person or to return the documents with tracked changes.

The Lead Instructional Designer works with the SME(s) to create a Course Outline that describes the recommended deliverables as a high-level learning solution. After the Course Outline is approved, the Lead Instructional Designer will use it to create the detailed Design Plan or Lesson Plan.

Stage	Who	Does What
1	Project Manager	Schedules and leads an internal (L&D) team meeting with the L&D Learning Project Team, Instructional Designers, Developers, Logistics, and Communications, to plan to deliver on training strategy (Post it notes)
2	Lead Instructional Designer	Works with SME(s) and other appropriate resources to plan the details of the full course, including: <ul style="list-style-type: none"> Content/Method Risks/Opportunities Course objectives Topical Outline Learning assessments and course evaluation methods Assessment questions Submit request for Communications (Service Now) Documents this information in the Course Outline, with a recommendation for training deliverables.
	Lead Developer	???
3	Project Lead, SME(s)	Reviews and approves course outline
4	Lead Instructional Designer	Updates the Course Outline.
5	Project Lead	Works with SME(s), Sponsor, and Learning Officer to review, finalize, and approve Course Outline, and make pilot decision.
6	Lead Instructional Designer	Creates a detailed Design Plan/Lesson Plan. This will include all the details needed to develop learning materials and may include: <ul style="list-style-type: none"> Storyboards (e.g., eLearning, video) Scripts (e.g., eLearning, audio, video) Materials/Resources Assets needed Training Time Layouts (e.g., ILT slides, web page, artwork) Evaluations (Level 1-4) Assessments
7	Project Lead/Lead Instructional Designer	For major projects, and when needed: Reviews the Design Plan/Lesson Plan with Sponsor, SME(s), and executive, if needed, for feedback and approval.

Development Phase

The Development Phase begins with the Design Plan.

Deliverables: Project Plan, Course Outline, Training materials, Communications materials, Review Log

During this phase, the Lead Instructional Designer will work with the Developer(s) to create the full course materials.

Although the customer is not involved in this phase until the Learning Project is ready for the External Approval Sub-Process, the Project Lead should ensure that the customer feels safe, by keeping them informed about the status of the Learning Project.

Stage	Who	Does What
1	Project Manager	<p>Schedules and facilitates a Development meeting with Developers, Logistics, and Communications to coordinate our resources and ensure that each person involved in the creation of any materials during the Development Phase is aware of and agrees to his or her deliverables.</p> <p>During this meeting, the group will discuss the details of those deliverables to ensure that they understand:</p> <ul style="list-style-type: none"> • What will be developed • Which resources is assigned to each task • How it supports the learning objectives • When each deliverable should be completed
2	Developers	<p>Create all course materials, which may include:</p> <ul style="list-style-type: none"> • Audio • Video • Facilitator Guide • Participant Guide • eLearning • QRG • ILT/vILT Presentations • Evaluations 1-4 • Assessments
3	Communications	Plans communications; works with developers for any graphics or other assets that may be needed; drafts communications
4	Logistics	Prepares for QA/Technical Review, implementation, and Evaluation phases.
5	Lead Instructional Designer	Initiates Internal Review: Sends training materials to L&D Project Team (Logistics, peer Instructional Designer, Project Lead, Project Manager, Learner Officer) for Internal Review.

		<p>Conducts Internal review. Each reviewer has a specific area of focus:</p> <table border="1"> <thead> <tr> <th>Review Type</th><th>Role</th><th>Description</th></tr> </thead> <tbody> <tr> <td>QA Review</td><td>Logistics</td><td>Functionality, grammar, punctuation, language, and consistency with our style guide.</td></tr> <tr> <td>Peer Review</td><td>Instructional Designer</td><td>Sound instructional design principles and clarity. Training meets Learning objectives.</td></tr> <tr> <td>Scope Review</td><td>Project Lead</td><td>Business perspective - ensures that we have stayed true to the scope of the project and that the materials support the business need.</td></tr> <tr> <td>Impact Review</td><td>Project Lead</td><td>Business impacts and areas of concern have been identified, handled and expressed appropriately.</td></tr> </tbody> </table>	Review Type	Role	Description	QA Review	Logistics	Functionality, grammar, punctuation, language, and consistency with our style guide.	Peer Review	Instructional Designer	Sound instructional design principles and clarity. Training meets Learning objectives.	Scope Review	Project Lead	Business perspective - ensures that we have stayed true to the scope of the project and that the materials support the business need.	Impact Review	Project Lead	Business impacts and areas of concern have been identified, handled and expressed appropriately.
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Impact Review	Project Lead	Business impacts and areas of concern have been identified, handled and expressed appropriately.															
6	L&D Project Team	See also Internal Review RACI Matrix on page 21.															
7	Lead Instructional Designer	<ul style="list-style-type: none"> Tracks all review comments in the Review Log Responsible for revisions (working with Developers, if needed) Sends a summary email or document to the reviewers when multiple revisions are requested so they can see all requested revisions. Send reviewed materials out for Internal Review team approval. Team members verify that their requested revisions have been completed, and materials are ready for external review. 															
8	Lead Instructional Designer	Initiates External Review process. See page 10 for details.															
9	Project Lead	<p>Facilitates a meeting with the Developers, Logistics, Communications, and the Project Manager to discuss the Implementation Plan, and any changes that may have occurred since the initial L&D team meeting.</p> <p>Ensures that implementation tasks such as scheduling, catering, publishing, or any other coordination is in place.</p>															

External Review

The Lead Instructional Designer initiates the External Review process at one of two points in the Learning Project.

- During the **Development Phase**, the Lead Instructional Designer initiates the External Review after the Internal Review is completed.
- During the **Implementation Phase**, the Lead Instructional Designer initiates the External Review when the Pilot Training Event warrants an update to the Learning Project. This phase should be Easy and Safe for the reviewer to provide a quick review of the information as it pertains to their role, with a clear picture of the other reviewers involved and their functional focus.

Stage	Who	Does What		
1	Lead Instructional Designer	Sends training materials to External reviewers identified in project plan.		
2	External Reviewers	Conduct External review. Each reviewer has a specific area of focus:		
		Review Type	Role	Description
		Content Review	SME	Content is complete, explained clearly and accurately.
		Scope Review	Sponsor,	Business perspective - ensures that we have stayed true to the scope of the project and training supports business goals.
		Impact Review	OCM	Business impacts have been identified, handled and expressed appropriately.
		Legal Review	Legal	Legal concerns have been addressed appropriately
3	Lead Instructional Designer	Overall Experience	End User	What did you think of this training? Was this training worthwhile? Would you recommend it to a co-worker?
		The Executive communicates directly with all reviewers as needed, to discuss questions, recommendations, or concerns about content, scope, impact, etc.		
		For details, see: External Review RACI Matrix on page 22. External Reviewer Responsibilities and Checklists on page 24		
4	External Reviewers	<ul style="list-style-type: none"> • Tracks all review comments in the Review Log • Responsible for revisions (working with Developers, if needed) • Sends a summary email or document to the reviewers when multiple revisions are requested so they can see all requested revisions. • Send reviewed materials out for approval. Reviewer verify that their requested revisions have been completed, and materials are ready for approval. <p>Note: If another Review is required, the Project Lead should assess if further revisions constitute a Change in Scope.</p>		
		Approve Training. See External Approval RACI Matrix on page 23.		
5	Executive	Gives final approval.		

Implementation Phase

The Implementation Phase begins after the course materials have been approved.

Logistics has primary responsibility for this phase, so activities that occur during this phase are discussed at a high level. For more information, refer to the Logistic process and plan.

Stage	Who	Does What
1	Lead Instructional Designer	Delivers training materials to Logistics
2	Logistics, Communications	If a Pilot is planned: <ul style="list-style-type: none"> Logistics prepares for and launches the pilot Works with Communications to create and send pilot communications Gathers feedback from Pilot
3	Lead Instructional Designer	If needed, based on feedback from pilot: <ul style="list-style-type: none"> Makes revisions Initiates the External Review Process. See page 10. Delivers revised training materials to Logistics
4	Logistics, Communications	Logistics prepares for the Training event(s) and launches the course. Communications sends prepared information to the intended audience(s)

Evaluation Phase

The Evaluation Phase begins at a time identified in the Project Plan. Logistics and the Project Manager share responsibility to collect and analyze the data, and create the Project Summary.

Deliverables: Project Summary

The Evaluation phase includes the collection, analysis, and actions based on Evaluation data, including:

- Completion Reports
- Evaluation Levels 1-4
- Project Summary

If multiple Evaluation Levels are used, this may require multiple dates and multiple iterations of the Evaluation Phase.

The Evaluation phase provides data to indicate areas of success as well as challenges and issues. This phase focuses on constructive solutions and behaviors, and opportunities for improvement.

Stage	Who	Does What
1	Logistics	Collects data needed for evaluation. Analyzes data to interpret trends and possible recommendation
2	Project Manager	Reviews analysis Creates the Project Summary, including any recommended actions
3	Project Manager	Coordinates a Project Review meeting; shares responsibility with Logistics to present recommendations to Learning Officer and Customer
4	Learning Officer, Customer	At the meeting, make a shared decision based on the Project Summary and recommendations.
5	Lead Instructional Designer	If urgent updates are needed to training: <ul style="list-style-type: none"> • Make revisions • Initiate External Review process
	Project Manager	If low priority updates are requested, documents requests in the Project Summary. When the course receives an update, these low priority updates will be included.
6	Project Manager	Captures final decisions in the Project Summary

Project Completion

After the course goes live and is stable, but before everyone forgets it, the instructional designers and developers will work together to organize the files and folders, deciding what materials need to be moved into TRIM and what materials may safely be deleted. They will work with the TRIM Super User to complete this work.

APPENDICES

Appendix 1: Roles & Responsibilities

Sponsor

The sponsor is usually the leader of the Business Segment or Department requesting the Learning Project.

Throughout the project, the sponsor will be responsible for working with the executive and other appropriate people in the organization to make business decisions, and provide business messages and answers to business questions needed for the Learning Project.

Analysis Phase:

Because the sponsor is responsible for the scope review, they are very involved in the Analysis phase of the project, defining what will be in scope for the project, and what will be out of scope.

In situations where more tasks and knowledge exist than time allotted to training, the sponsor works with the Lead Instructional Designer to prioritize the tasks, and determine what must be included in training, what may be made available as pre-work, post-work, or job aids, or can be left out entirely.

The sponsor often identifies SME(s) for the project. The sponsor also provides valuable insight into the audience, constraints, training strategy preferences, and other information needed during the Analysis phase, and should participate actively in project meetings during this phase of the Instructional Design process. The sponsor also keeps the executive responsible for approving the training informed about the Learning Project.

Design Phase:

During the design phase, the Lead Instructional Designer works most closely with the SME(s) to determine and organize the content for the course. The sponsor reviews and approves the output from this work, the course outline. This gives the sponsor the opportunity to ensure that the training covers all in scope items, and identify potential gaps in training.

After sponsor approval, the Lead Instructional Designer creates the detailed Design Plan or Lesson Plan. This document spells out all the details the Developer need to create the actual training. For major projects, the Design Plan or Lesson Plan may include scripts or storyboards, layouts, graphic designs, quiz questions, and other details that affect the learner experience. For major projects, the sponsor does another review at this stage, to ensure that the final training materials will meet expectations, and to minimize expensive Developer rework and delivery delays.

Development Phase:

When the training materials are ready for external review, the project team meets to clarify expectations for the review process. In order to ensure that delivery deadlines are met, reviewers focus on specific type of review and perform their reviews at the same time. The sponsor reviews for scope, but if other concerns (not related to scope) are noticed, communicates with the other reviewers to ensure that they are not missed.

The sponsor provides details of all review comments related to scope, so that the Lead Instructional Designer can log them, share them with the entire review team, and ensure that any needed revisions are made correctly. At this point, reviewers meet and discuss review comments to ensure that the proposed revisions are consistent and agreeable to the entire review team.

After the revisions have been completed, the sponsor goes over the training materials again to ensure that they requested during the initial scope review have been made correctly. If so, the sponsor gives scope approval.

IMPORTANT: In order to eliminate the need for multiple rounds of review, all external reviewers should take the time needed to perform a complete review (for their assigned focus) the first time, then work closely with other reviewers to ensure that all review feedback is consistent and aligns with Business Goals and Learning Objectives.

Subject Matter Expert (SME)

The SME is the content expert, responsible for providing the task details and knowledge needed to build the training. The SME provides the content, and performs the content review to ensure that the knowledge and task detail are complete and accurate. The SME will be deeply involved in the Analysis and Design phases of the project, working with the Lead Instructional Designer to create the Task Analysis and other information needed for the Learning Project.

Executive

[Details needed here]

Appendix 2: Project Documents

These project documents are used in the Instructional Design Process:

Document	Purpose	Phase	Owner
Project Intake Form	Initial information from Requester. Used to make initial go-no go decision	Intake	L&D Management, Logistics, Project Lead
Project Plan	Project-related information.	Intake, Analysis, Design, Development	Project Manager
Training Plan	Results of analysis and recommended training strategy	Analysis, Design	Lead Instructional Designer
Measuring Success Plan	Information needed for Evaluation phase	Analysis, Evaluation	Project Lead, Logistics
Course Outline	Course information - tasks included in the course and flow of content	Design, Development	Lead Instructional Designer
Design Plan / Lesson Plan	Detailed instructions for creating course materials	Design, Development	Lead Instructional Designer
Review Log	Track reviewer feedback and revision requests	Development	Lead Instructional Designer, Developer-content owner
Project Summary	Learning project results	Evaluation	Project Manager

Appendix 3: Core Templates

Core templates support the ID process, and will generally be used for all Learning projects. Other project documents, such as Course Outline and Design Plan/Lesson Plan, will not always use a standard template. Content will drive those documents.

Project Intake form

Built into ServiceNow, the Project Intake form is used to gather the critical information regarding the goals, audience, and people involved with the Learning Project.

Form Location:

<https://app.smartsheet.com/b/form?EQBCT=7f0ca699036d4fafbd4b855b50cc2ad6>

Information Requested:

Business Segment	Business segment requesting and approving project.
Project	Let us know the name of your project.
Does this request impact stores	To help us determine impact on the stores
Start	When do you anticipate starting this project?
Finish	When is the project due?
Project Manager	The name of the project manager if assigned from the PMO (if known).
Assigned To	Who are you requesting to work on this project (If known)?
Contributors	Who are the team contributors, SMEs, experts, to this project (if known)?
Requested By	What is your name or the name of the person requesting this project?
Sponsor	Who is going to provide day to day support on this project at the business level?
Project Objective	Provide as much detail and information as possible here. An objective statement is usually to accomplish something by a certain time, with a cost, schedule or performance metric.
Request submitted by	And last but not least, your name here.

The screenshot shows a ServiceNow form titled "IDT Project Request Form" for "DISCOUNT TIRE". The form includes the following fields:

- Business Segment**: "Business segment requesting and approving project".
- Project**: "Let us know the name of your project".
- Does this request impact stores**: "To help us determine impact on the stores".
- Start**: "When do you anticipate starting this project?".
- Finish**: "When is the project due?".
- Project Manager**: "The name of the project manager if assigned from the PMO (if known)".
- Assigned To**: "Who are you requesting to work on this project (If known)?".
- Contributors**: "Who are the team contributors, SMEs, experts, to this project (if known)?".
- Requested By**: "What is your name or the name of the person requesting this project?".
- Sponsor**: "Who is going to provide day to day support on this project at the business level?".
- Project Objective**: "Provide as much detail and information as possible here. An objective statement is usually to accomplish something by a certain time, with a cost, schedule or performance metric." (with a note: "Provides as much detail and information as possible here. An objective statement is usually to accomplish something by a certain time, with a cost, schedule or performance metric").
- Request submitted by**: "And last but not least, your name here".
- File Attachment**: "If you have anything to provide, please attach to this request" (with a "File name" field and a "Upload" button).
- Send me a copy of my responses**: A checkbox.
- SUBMIT**: A blue button at the bottom.

Project Plan

The Project Plan captures essential information about the project, and will be updated as needed throughout the life of the project. The Project Plan may be customized as needed to support the Learning Project.

The Project Plan is divided into three sections, each of which describes the Learning Project's components in detail appropriate to the Learning Project's complexity.

Template Location: Word Templates folder on Department Drive
(\\dtc_files\\Corporate\\DTC_Integrated Development Team\\Project Tools - Templates\\Word Templates)

Business Goals	List relevant Company Focus point
Business background	Introduce the reason for this project by providing a brief background of factors/drivers that created a problem, opportunity, or business requirement
Training Goals	Explain how this project supports the business goal
Training benefits	Identify groups that benefit, and tie benefit back to goals.
L&D Roles	Project roles and people assigned to them
External Reviewer Roles	Project roles and people assigned to them
Project Start Date / Due Date	Start and end dates for this project
Risks and Issues	Document risks and issues
Project Schedule	Schedule for designing and developing training
Training Rollout Schedule	Schedule for delivering training

Training Plan

The Lead Instructional Designer records the results of the analysis in the Training Plan. This information is used to make training decisions, and design training. The Training Plan may be customized as needed to support the Learning Project.

Template Location: Word Templates folder on Department Drive
(\\dte_files\Corporate\DTCTeams\Project Tools - Templates\Word Templates)

Goals & Benefits	Business and training goals and benefits
Training Objectives	List training objectives
In Scope / Out of Scope	Document what is in or out of scope for training
List of Deliverables	List all deliverables associated with this Learning Project
Timeline	Schedule for development of training
Training Strategy	Recommend a strategy for delivering training experience. May reference a separate strategy document
Training Requirements	Describe requirements for training (generally provided by customer)
OCM Concerns & Issues	Explain potential impacts or areas of concern and level of OCM involvement in this project
Legal Concerns & Issues	Explain potential impacts or areas of concern and level of Legal involvement in this project
Information Security Concerns & Issues	Explain potential impacts or areas of concern and level of Information Security involvement in this project
Roles & Responsibilities	L&D and External Reviewer Roles
Audience Analysis	Identify each audience and document their training needs
Performance Gaps	Identify performance gaps, if any, and explain how training will address them.
Needs Analysis	If performance gaps have been identified, perform needs analysis to verify that knowledge and skills gaps exist.
Task Analysis	Document tasks to be trained (may reference a separate task analysis document.)
Related Project document	List other project documents, owner, and location

Measuring Success Plan

The Project Lead determines what success looks like and what data will be needed during the evaluation phase and how it will be collected. This information is used to develop the evaluation plan.

Template Location: Word Templates folder on Department Drive
(\\dtc_files\Corporate\DTCTeams\Project Tools - Templates\Word Templates)

Critical Success Factors	Define success for this project
Pilot decisions	Document any decisions related to a pilot
Training Schedule decisions	Document any decisions related to the training schedule
Evaluation levels	Document how each evaluation level will be measured
Reporting and remediation plan	List reports that are needed, and plan to improve if results aren't satisfactory
Certification process	Document certification process, if any

Project Summary

The Project Summary reports out the results of the Learning Project.

ID Project Summary Template: Located in Word Templates folder on Department Drive
(\\dtc_files\\Corporate\\DTC_Integrated Development Team\\Project Tools - Templates\\Word Templates)

The Project Summary Template is organized as follows:

Introduction	Timeline of the project, and executive summary; includes business outcomes and training objectives
Lessons Learned	What we learned from this project, and recommendations
Evaluation Details	Detailed information that supports the summary.
Appendix	<ul style="list-style-type: none"> • Completion Report • Level 1 – Reaction This level measures how the learners (the people being trained), reacted to the training. We want them to feel that the training was a valuable experience, and to feel good about the instructor, the topic, the material, its presentation, and the venue. • Level 2 – Learning This level measures what the learners have learned. (includes changes in knowledge, skills, or attitudes) It is often helpful to measure before and after training. How much has their knowledge increased as a result of the training? • Level 3 – Behavior (<i>not used for all Learning Projects</i>) This level evaluates how much the learners have changed their behavior, based on the training they received. Specifically, this looks at how learners apply the information. • Level 4 – Results (ROI) (<i>not used for all Learning Projects</i>) This level analyzes the final results of your training. This includes outcomes that we have determined to be good for business, good for the employees, or good for the bottom line. <p>Possible outcomes may include:</p> <ul style="list-style-type: none"> Increased employee retention. Increased production Higher morale Reduced waste Increased sales Higher quality ratings Increased customer satisfaction

Appendix 4: Sample Request for Level of OCM/Legal/Security Involvement

During the Analysis phase, the Lead Instructional Designer will contact OCM, Legal, and Information Security to introduce the Learning Project, and get information about their level of involvement. If OCM, Legal, or Information Security have areas of potential concern, a meeting should be scheduled to discuss. Learning materials need to meet OCM/Legal/Security requirements, and so that OCM/Legal/Security can be included in the External Review process.

Currently sending this to L&D Manager, Project Lead, Project Manager and:

LEGAL: Chris Henrichsen, Cindy Chipman

INFO SECURITY: Dean Altman (John Pontrelli is backup if Dean is not available)

OCM: Carolyn Henderson, Al Hatfield, Ian Carter

SAMPLE REQUEST:

SUBJECT: FYA: Request: Level of **Legal** Involvement in Learning Project – [Project Name]

Hello [Name(s)],

We are starting a new training project to [briefly explain purpose here]. We want to ensure that **Legal** concerns and potential issues are handled appropriately. Please review this request, and respond to the questions below. If you have areas of concern or issues to consider when designing this training, let me know when/if you would like to meet to discuss.

Lead Instructional Designer: [Name]

Project Lead: [Name]

L&D Manager: [Name]

Project Manager: [Name]

Project Name: Kronos Upgrade

Description: [Briefly explain what the project as a whole involves.]

Impacted Employees: [list who is impacted]

Business Rule changes: [explain]

Process changes: [explain]

Here is a current copy of the initial draft (in-process) Training Plan. (Yellow highlighting indicates that project content has not yet been included)

[Attach draft training plan here]

Est. External Review dates: [date]

Est. Go-Live date: [date]

QUESTIONS:

1. **What level of involvement do you anticipate?** (high, medium, low, not needed)

2. **Areas of potential concern / Issues to consider:**

3. **Will you participate in the External Review** yes/no

4. **Primary **Legal** Contact:**

Thanks so much for your help!

Appendix 5: RACI

Raci Legend

Obligation	Code	Responsibilities
Responsible	R	Clearly defines the decision to be made. The "Assigned To" in SharePoint.
Accountable	A	The final decision-maker(s). May also provide boundaries to the Responsible person for the decision to be made.
Consulted	C	Assists the Responsible person in compiling the information and / or preparing the document.
Informed	I	Those people and / or groups to be consulted regarding the information needed to complete this document. (2-way communication)
Supported	S	Those people that receive information about the decision / situation. (1-way communication) May be done after the fact.

Internal Review RACI Matrix

Role \ Task	Initiate Internal Review	QA Review	Peer Review	Internal Scope Review	Internal Impact Review
Lead Instructional Designer	R	I	R/S	I	I
Project Lead	A	A	A	R	R
Project Manager	I			I	I
Learning Officer	I			A	A
Logistics	I	R/S			
OCM	I			C	

External Review RACI Matrix

Role \ Task	Initiate External Review	Content Review	Scope Review	Impact Review	Legal or Security Review	Overall Experience Review
Lead Instructional Designer	R	I	I	I	I	I
Project Lead	A	A	A	A	A	A
Project Manager	I	I	I	I	I	I
Learning Officer	I		C		C	C
Logistics	I	S				S
SME		R				
Sponsor			R	C	I	I
Executive		I	I	I	I	I
Legal or Security					R	
OCM				R		I
End User						R

External Approval RACI Matrix

Task Role \ Task	Initiate External Review	Content Review	Scope Review	Impact Review	Legal or Security Review	Overall Experience Review
Lead Instructional Designer	R	I	I	I	I	I
Project Lead	A	A	A	A	A	A
Project Manager	I	I	I	I	I	I
Learning Officer	I	C	C		C	C
Logistics	I	S				S
SME		R				
Sponsor		I	R	C	I	I
Executive		I	I	I	I	I
Legal or Security					R	
OCM				R		I
End User						R

Appendix 6: Internal Peer ID Reviewer Responsibilities and Checklist

An Instructional Designer, not involved with this Learning Project, conducts a review that ensures that the training:

- Uses sound instructional design principles
- Meets the learning objectives

The reviewer will also compare training materials with the Course Outline to ensure that:

- Any assessments align to the objectives
- We are delivering what has been agreed to in the Course Outline.

Appendix 7: External Reviewer Responsibilities and Checklists

External reviewers ensure that we deliver training that is Inviting, Easy, and Safe for Our People.

External reviewers will conduct a specific type of review, according to their role in the Learning Project.

Sample Communication

TO: External Reviewers

CC: Project Team

SUBJECT: FYA: Please review Project X Training and provide feedback by xx/xx/xx

BODY:

Project X Training is ready for your review. Because we respect your time and expertise, we are asking you to focus on and perform a specific type of review, explained below.

In order to meet our delivery commitments, we need to avoid multiple rounds of review:

- Please take the time you need to conduct a careful and complete review.
- If another person needs to be involved in the review process, please contact me as soon as possible, so we can add them to the Training Plan and send training materials to them for review.
- If you prefer to discuss your review comments in person, or would like to collaborate with other reviewers, please contact me so we can schedule a review meeting.
- If another person is doing the same type of review as you are doing, collaborate with them and agree on your review comments. Only one of you should submit feedback.

Reviewer Name(s)	Type of Review
Xx, yy	Content Review
Xx	Scope Review
Xx	Impact Review
Xx	Legal Review
Xx	Security
Xx, yy, zz	Overall Experience Review

Please follow the checklist guidelines below for your type of review. Take notes of any issues you find, and where you find them. Click the feedback link and explain revisions that need to be made.

[Executive Name], please have a look at the training materials, and let the appropriate reviewer(s) know if you have any questions, recommendations, or areas of concern that they can include in their review feedback.

Thank you for taking the time and effort to ensure that our Learners have a great learning experience!

Content Review Checklist

The Content Review focuses on the information and steps to perform tasks in the training. As a Subject Matter Expert, you will review the training from two different points of view at the same time:

- As the expert, you ensure that the information covers the topic adequately and accurately.
- At the same time, you must review training from the Learner's point of view, and make sure that learning is clear and easy to understand. Can the Learner perform the tasks being trained?



Does the training cover the topic adequately?

It is understandable for experts to want to share everything they know about the topic, but too much information may overwhelm Learners. Please review to determine that the right amount of information is included, not too much or too little.



Is the content accurate?

Please document any content errors.



Is the content clear and easy to understand?

Will the Learner understand the language and terminology? Are all new terms explained clearly? Does training use simple, clear language and sentences? Do graphics/video support learning?



Are there any areas where the Learner might misunderstand or become confused?

Put on your Learner hat. Look for content gaps. Are there any skipped steps in the learning? Is there any knowledge that we have assumed the Learner knows, but that the Learner may not know?



Is the Learner prepared to perform the tasks included in training?

Scope Review Checklist

The Scope Review ensures that the training covers the correct knowledge and tasks. Training includes all that was agreed to in the Training Plan, and excludes information and tasks that are determined to be Out of Scope in the Training Plan.

(document what's in scope and what's out of scope from the training plan)

SAMPLE Verbiage:

In Scope: All knowledge and skills needed to perform store tasks that use on the new POS. See Content Outline for details.

Out of Scope: Learners are assumed to be proficient with the current POS. Training does not cover basic training in core POS concepts, e.g. what is an adjustment and when do we offer one.



Are all In Scope items included appropriately in training?



Do we need to cover anything else that was not previously defined as In Scope?

Please be aware that additions to training at this point probably will impact the delivery schedule.

Impact Review Checklist

The Impact Review focuses on the Impact of this training on the Learner and the Business and ensures that it is in alignment with Discount Tire's Organizational Change Management strategy.

At the start of this Learning Project, OCM identified the following potential issues and areas of concern: *(from training plan)*

- 1) Issue X
- 2) Area of potential concern X

Have these issues and areas of concern been handled appropriately in the training?

Are there other impact / organizational change issues that need to be addressed or handled differently?

Legal Review Checklist

The Legal Review focuses on the Legal Impact of this training and ensures that it conforms to all legal requirements and best practices.

At the start of this Learning Project, Legal identified the following potential issues and areas of concern: *(from training plan)*

- 1) Issue X
- 2) Area of potential concern X

Have these issues and areas of concern been handled appropriately in the training?

Are there other legal issues that need to be addressed or handled differently?

Information Security Review Checklist

The Information Security Review focuses on the Security Impact of this training and ensures that it conforms to all requirements and best practices.

At the start of this Learning Project, Information Security identified the following potential issues and areas of concern: *(from project plan)*

- 1) Issue X
- 2) Area of potential concern X

Have these issues and areas of concern been handled appropriately in the training?

Are there other Information Security issues that need to be addressed or handled differently?

Overall Experience Review Checklist

The Overall Experience Review focuses on the Learner Experience.



What did you think of this training?

Did you like it? Were there places in training where you felt bored? Confused? Irritated? Was the pace too fast? Too slow? Did you have technical difficulties?



Was this training worthwhile?

Did you learn something? Was it appropriate for your experience level? What did you find too easy? What did you find too difficult? Did you get enough benefit to justify the time spent? Would you recommend it to a co-worker?