

## INTRODUCTION

For the purposes of confidentiality and anonymity, all identifiable company information has been removed from this document. The company in question is a global provider of security and cloud-based software solutions purpose-built for Managed Service Providers (MSPs) with over 2,000 employees worldwide.

## PROJECT PLAN

### Stakeholders

Project Manager: Matt Foster (*Instructional Designer*)

Project Sponsor(s): Support Leadership

- [NAME REDACTED], Director of Technical Support
- [NAME REDACTED], Training Director
- [NAME REDACTED], Support Manager
- [NAMES REDACTED], Support Supervisors

Learner(s): Technical Support Representatives

Customer(s): Managed Service Providers (MSPs)

Subject Matter Expert(s): Level 2 & Level 3 Technical Support Representatives

Peer Review: Instructional Designer

Additional Expert(s): Hypervisor Setup (Lab Tech) + Ticket Analytics (Data Analyst)

### Technology

The topics for these trainings will be determined by studying and assessing analytics on the most frequent issues that partners submit trouble tickets for. The information will be delivered through a combination of short eLearning modules and virtualized break-fix activities in a hypervisor environment.

### Project Goal

Pilot a new process for Technical Support Representatives to receive ongoing technical training by the end of Q2 at a cost of approx. 700 hours, or 4 months, of the Project Manager's time.

## **Opportunity Definition**

Employees in the Technical Support department currently receive training during their first four weeks with the company but there is no official program in place to offer ongoing training beyond that. This current system fails to address more advanced technical topics or newer, relevant issues that they may encounter. This leaves these employees to obtain this knowledge through a combination of third-party sources and 'tribal knowledge'.

## **Proposed Solution**

Schedule consistent analysis of recent trouble tickets to create a list of five relevant technical topics and/or issues being handled by Technical Support and create three to five minute micro eLearnings to be completed by Technical Support Representatives at their own workstations, including practical assessments consisting of virtual machine break-fix activities hosted on a training hypervisor.

## **Requirements**

1. Cooperation of Technical Support Department
2. Hypervisor environment to host and manage VM break-fix activity assessments
3. Access to data of recent trouble tickets including most common "open codes"
4. Support-approved list of five (5) topics based on ticket analysis
5. Subject Matter Experts (SMEs) to assist with developing content
6. Approved time for instructional designer to develop the content
7. Approved time for learners to complete training

## **Scope**

### Major Project Activities:

1. Develop list of topics (5)
2. Establish and work with Subject Matter Experts (SMEs)
3. Develop eLearning content for each topic
4. Program virtual machine (VM) assessment for each topic
5. Prepare the learner environment
6. Review results post-delivery

### Out of Scope Activities Critical to Success of the Project:

1. Continue to develop and deliver these trainings on a regular cadence (if approved)
2. Actively monitor and manage online eLearning content and virtual machine assessments
3. Schedule Technical Support representatives to complete training
4. Confirm Technical Support representatives are completing training at scheduled time
5. Implement procedure to revert 'fixed' virtual machines to 'broken' state
6. Monitor Technical Support reps post-training to confirm changes to behavior

### **Schedule Overview**

Estimated Project Completion Date: 06/30/18

#### Major Milestones:

1. 03/01/18 – List of Topics
2. 03/15/18 – Outline Approved
3. 05/01/18 – eLearning Content (x 5)
4. 06/01/18 – Virtual Machine Assessment (x 5)
5. 06/30/18 – Ready to Deliver
6. 07/01/18 – Review Project Results

### **Major Obstacles**

1. Technical Support Representative availability at scheduled training time
2. Technical issues / malfunctions with eLearnings or the hypervisor environment
3. Difficult to monitor learner attention through eLearning
4. What to do if the same topics continue to appear in the scheduled analytics
5. Inconsistent SME response / content
6. Only one learner can access a VM at a time (scalability and scheduling)

## WORK BREAKDOWN STRUCTURE (WBS)

ID	LVL 1	LVL 2	LVL 3	RESOURCE
<u>1</u>	<u>List of Topics</u>			
1.1		<i>Initial Analysis</i>		
1.1.1			Determine timeframe for ticket data	Support Leader
1.1.2			Determine metrics for report to be based on	Support Leader
1.2		<i>Statistical Analysis</i>		
1.2.1			Analyze chosen metrics for set timeframe	Data Analyst
1.2.2			Prepare report for Support Leadership	Data Analyst
1.3		<i>Write List</i>		
1.3.1			Work with Support Leadership to narrow list to five most common topics/issues	Support Leader
1.3.2			Review and refine list for case-by-case anomalies	Support Leader
1.3.3			Finalize list of five topics with Support Leadership	Support Leader
<u>2</u>	<u>Subject Matter Experts (SMEs)</u>			
2.1		<i>SME Selection</i>		
2.1.1			Work with Support Leadership to identify recommended SME(s) for each topic	Support Leader
2.1.2			Schedule meetings with SME(s) and their supervisor to discuss project	Support Leader
2.1.3			Confirm SME + Supervisor 'buy-in' at meeting	Support Leader
2.2		<i>SME Meetings</i>		
2.2.1			Schedule initial meeting to discuss topic in detail	Support Leader
2.2.2			Review expectations and deliverables with SME(s)	Approved SME
2.2.3			Work with SME(s) to develop understanding of approved technical topic	Approved SME
2.2.4			Confirm "what does success look like?"	Approved SME
2.2.5			Establish three to five learning objectives	Approved SME
2.2.6			Develop outline of content to be covered in eLearning and tested via virtual machine assessment	Approved SME
2.2.7			Brainstorm and choose hands-on assessment examples with SME	Approved SME
2.2.8			Confirm chosen assessment accomplishes learning objectives	Approved SME
2.2.9			Work with SME(s) to identify any possible shortcuts or alternative solutions to proposed	Approved SME

	assessment	
2.2.10	Review outline with SME for accuracy and relevancy	Approved SME
2.2.11	Review outline with Support Leadership for approval	Support Leader
2.2.12	Make any changes if necessary and re-review	N/A
2.3	<i>Rinse, Repeat</i>	
2.3.1	Repeat tasks 2.1.1 – 2.2.12 for other four topics	N/A
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<u>3</u>	<u>eLearning Content</u>	
3.1	<i>Content Creation</i>	
3.1.1	Design eLearning content based on approved outline using applicable modality for that topic	I.D.
3.1.2	Write and upload closed captioning	I.D.
3.1.3	Create additional learning materials (job aids, handouts, etc...) if necessary	I.D.
3.1.4	Schedule additional meetings with SME(s) if necessary to confirm understanding and/or address any questions	Approved SME
3.2	<i>Testing &amp; Review</i>	
3.2.1	Self-test content start to finish for any issues with buttons and/or scripted functionality	N/A
3.2.2	Have additional Instructional Designer stress test developed content	I.D.
3.2.3	SME(s) reviews and confirms content is accurate and accomplishes established learning objectives	Approved SME
3.2.4	Final review of eLearning content with Support Leadership	Support Leader
3.2.5	Make any changes if necessary and re-review	N/A
3.3	<i>Rinse, Repeat</i>	
3.3.1	Repeat tasks 3.1.1 to 3.2.5 for other four topics	N/A
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<u>4</u>	<u>VM Assessment</u>	
4.1	<i>Logistics</i>	
4.1.1	Work with Support Leadership to confirm training participants and completion timeframe ("VM Sign Out Procedures")	Support Leader
4.1.2	Work with Lab Admin to implement "VM Sign Out Procedures" to prevent multiple techs working on same VM	Lab Tech
4.1.2	Develop plan to revert VM to 'broken' state once fixed	Lab Tech
4.2	<i>Build VM</i>	

4.2.1	Review current resource usage on training hypervisor and confirm enough available for assessment VM	Lab Tech
4.2.2	Create virtual machine in approved 'broken' state	<i>Approved SME</i>
4.2.3	Save snapshot to be able to revert back to once the issue is 'resolved'	Lab Tech
4.2.4	Review hypervisor resources with VM running	Lab Tech
4.3	<i>Testing &amp; Review</i>	
4.3.1	Confirm scenario is able to be resolved using desired solution	N/A
4.3.2	Pilot test assessment 'blind' with approved Support Techs to test for alternate solutions to considered	Support Leader
4.3.3	SME(s) reviews and confirms assessment is accurate and accomplishes established learning objectives	<i>Approved SME</i>
4.3.4	Final review of VM assessment with Support Leadership	Support Leader
4.3.5	Make any changes if necessary and re-review	N/A
4.4	<i>Rinse, Repeat</i>	
4.4.1	Repeat tasks 4.2.1 – 4.3.5 for other four topics	N/A
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<u>5</u>	<u>Prepare Learner Environment</u>	
5.1	<i>eLearning Content</i>	
5.1.1	Upload eLearning to company LMS	I.D.
5.1.2	Upload HTML with instructions to book and access Virtual Machine assessment	I.D.
5.1.3	Test to confirm no changes to eLearning functionality within LMS	I.D.
5.2	<i>VM Assessment</i>	
5.2.1	Go 'live' with all five VM assessments	Lab Tech
5.2.2	Monitor hypervisor resources/activities for issues	Lab Tech
5.2.3	Confirm "VM Sign Out Procedure" in place	Lab Tech
5.2.4	Confirm process to revert 'fixed' VM to 'broken' VM in place	Lab Tech
5.3	<i>Feedback</i>	
5.3.1	Create learner feedback survey	Support Leader
5.3.2	Upload feedback survey to company LMS	I.D.
5.4	<i>Learner Awareness</i>	
5.4.1	Prepare announcement of new content and expectations of delivery to Support Techs	N/A
5.4.2	Approve announcement with Support Leadership	Support Leader

5.4.3	Post announcement to CX Notification Board	N/A
<u>6</u>	<u>Post Delivery</u>	
6.1	<i>Results</i>	
6.1.1	Review assessment results	Support Leader
6.1.2	Review feedback survey results	Support Leader
6.1.3	Document any findings and make any necessary changes	Support Leader
6.2	<i>Future Delivery</i>	
6.2.1	Develop a plan to continue delivering trainings on a regular schedule	Support Leader
6.2.2	Implement future delivery plans	Support Leader

## STAKEHOLDER ASSESSMENT

Stakeholder	What they need from the project	What the project needs from them	Perceived attitudes and/or risks
<b>Support Leadership</b>	<ul style="list-style-type: none"> <li>• Immediate delivery of training on current technical issues that their teammates are actively troubleshooting on calls.</li> <li>• Plan for ongoing training to be delivered to technical support reps based on relevant issues and product updates.</li> </ul>	<ul style="list-style-type: none"> <li>• Topic selection</li> <li>• SME selection</li> <li>• Outline approval</li> <li>• eLearning approval</li> <li>• Developing VM sign out process</li> <li>• Assessment approval</li> <li>• Plan for future delivery</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Availability</b> – With schedules booked weeks in advance, leadership is often not available for short notice meetings and/or decisions that need to be made</li> <li>• <b>Over Expectation</b> – Past projects have shown a trend of denying change due to triple constraints of project management (cost, schedule, scope)</li> </ul>
<b>Learners</b>	<ul style="list-style-type: none"> <li>• Relevant technical training for them and their peers</li> </ul>	<ul style="list-style-type: none"> <li>• Commitment to complete eLearnings during scheduled times</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Availability</b> – Getting approved time off of the phones for learners to be able to complete the trainings</li> </ul>
<b>Customers</b>	<ul style="list-style-type: none"> <li>• Competent and efficient technical support reps to help handle their issues</li> </ul>	<ul style="list-style-type: none"> <li>• Continued communication on technical issues they may be facing</li> <li>• Feedback on changes to level of support received</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Open Codes</b> – The topics for these trainings are based on the subjects of the tickets we receive from customers</li> </ul>
<b>Subject Matter Experts (SMEs)</b>	<ul style="list-style-type: none"> <li>• Clear expectations on their deliverables</li> <li>• Regular communication of progress and review</li> </ul>	<ul style="list-style-type: none"> <li>• Product knowledge</li> <li>• Assist with developing:</li> <li>• Learning objectives</li> <li>• eLearning Outline</li> <li>• Assessment Activities</li> <li>• Review content for accuracy</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Availability</b> – Due to SMEs being chosen from existing Tech Support Reps, they will need to balance their deliverables with all of their existing work duties which can result in unexpected delays</li> <li>• <b>Inaccuracy</b> – For many of the topics covered the knowledge will be coming</li> </ul>



			directly from and reviewed by the SMEs so there is potential for wrong information
<b>Lab Tech</b>	<ul style="list-style-type: none"> <li>• Hypervisor hardware and any necessary software licenses</li> <li>• List of scenarios that need to be prepared for the break-fix assessments</li> <li>• Schedule of learners that need to complete the assessments</li> </ul>	<ul style="list-style-type: none"> <li>• VM sign out process implementation</li> <li>• Plan to restore VMs to 'broken' snapshots</li> <li>• Assistance setting up VM break-fix assessments</li> <li>• Monitoring / troubleshooting training hypervisor environment</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dependency</b> – Lab Support's inclusion (and the entire break-fix assessment concept) relies on approval of budget for training hypervisor environment</li> <li>• <b>VM Sign Out</b> – Only one learner can access a VM at a time so developing a plan to coordinate their access is crucial</li> </ul>
<b>Instructional Designer / Peer</b>	<ul style="list-style-type: none"> <li>• Approved outline to develop content from</li> <li>• Clear expectations on their deliverables</li> <li>• Regular communication of progress and review</li> <li>• Completed eLearning content + additional learning materials that need to be posted</li> </ul>	<ul style="list-style-type: none"> <li>• Assistance designing:</li> <li>• eLearning content</li> <li>• Closed captioning</li> <li>• Additional learning materials</li> <li>• Stress test and review eLearning</li> <li>• Upload eLearning + additional learning materials to LMS</li> <li>• Monitoring / troubleshooting training materials in LMS environment</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Consistency</b> – All content needs to have one look and feel when delivered</li> <li>• <b>Tech Competency</b> – While peers will be able to assist with and review the eLearning content itself, they do not have the technical knowledge to review the actual content</li> <li>• <b>Compatibility</b> – Potential for eLearning content to behave or appear differently once uploaded to LMS than during testing</li> <li>•</li> </ul>
<b>Data Analyst</b>	<ul style="list-style-type: none"> <li>• List of KPIs and open codes to include in report</li> <li>• Frequency report will need to be pulled</li> </ul>	<ul style="list-style-type: none"> <li>• KPI + open code analysis and report</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dependency</b> – Analysis report depends entirely on metrics being provided by support leadership</li> <li>• <b>Relevance</b> – Potential for wrong or</li> </ul>

			unhelpful metrics to be included in report
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## COMMUNICATION PLAN

Stakeholder	Information Covered	Frequency	Medium
<b>Support Leadership</b>	<ul style="list-style-type: none"> <li>Status updates on project progress</li> <li>Timelines for when content is ready for support leadership reviews</li> <li>Any roadblocks</li> </ul>	Once per week on Monday morning	15-30 minute meeting at beginning of day
<b>Learners</b>	<ul style="list-style-type: none"> <li>Training launch announcement</li> <li>Training accessibility</li> <li>Learner Feedback</li> </ul>	Initial announcement of the training and how to access it followed up with announcement of the feedback survey	Post an online notification to the CX Portal
<b>Customers</b>	<ul style="list-style-type: none"> <li>N/A – No direct communication</li> </ul>	N/A	Trouble ticket open codes + KPIs
<b>Subject Matter Experts (SMEs)</b>	<ul style="list-style-type: none"> <li>“What is success”?</li> <li>Understanding of topic</li> <li>Establishing learning objectives</li> <li>Outline of content to be covered</li> <li>List of potential break-fix assessments to virtualize in training hypervisor</li> <li>Fact checking and confirming understanding</li> </ul>	An initial kickoff meeting to explain expectations and deliverables followed by additional meetings as needed	60 minute video conference (Zoom) meetings

<b>Lab Tech</b>	<ul style="list-style-type: none"> <li>• Scenarios for the break-fix assessments</li> <li>• Schedule of learners that need to complete the assessments</li> <li>• VM sign out process</li> <li>• Plan to restore VMs to 'broken' snapshots once 'fixed'</li> </ul>	An initial kickoff meeting to explain expectations and deliverables followed by additional meetings as needed	In person meeting in lab
<b>Instructional Designer / Peer</b>	<ul style="list-style-type: none"> <li>• Design needs (eLearning, workbook, handouts, etc...)</li> <li>• Design schedule</li> <li>• Breakdown of tasks</li> <li>• Status updates</li> <li>• List of content that needs to be posted to LMS (eLearning, workbook, handout, etc...)</li> </ul>	Once per day in the morning	10-15 minute phone call at beginning of day
<b>Data Analyst</b>	<ul style="list-style-type: none"> <li>• Breakdown of what needs to be analyzed and included in report</li> <li>• Schedule to pull report going forward</li> </ul>	An initial kickoff meeting to explain expectations and deliverables followed by additional meetings as needed	30 minute video conference (Zoom) meetings

## PROJECT BUDGET

Expense Item	Projected Cost (Complete during the plan phase)	Actual Cost (Complete during the manage phase)
<b>Hypervisor: Hardware</b> Provided by hardware department at no cost to training department	\$0	\$0
<b>Hypervisor: vSphere Licenses x 6</b> NOTE: This cost is a yearly recurring cost	~ \$7,200	_____
<b>Windows Licenses x 20</b>	~ \$2,400	_____

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### **Note on Labor Hours:**

*All work on this project will be completed by either myself (Matt Foster) or members of the Support Department. As a result, costs associated with labor are part of the employees' normal salary and will not impact this projects budget.*