

# **Instructional Planning Guide**

## **Capital Markets Services**

### **Project Management**

Gina Morey

## Introductory Note

**For the Training Specialist:** This document should be used in conjunction with the *Procedures Guide*. In the event of conflict between this document and the *Procedures Guide* concerning **document formats** the *Procedures Guide* will take precedent. In all conflicts concerning instructional design this *Instructional Planning Guide* will precede. If there are any other inconsistencies or if you have any question please ask your supervisor for clarification.

**For the Project Manager:** This guide uses a time frame of seven days. It assumes optimal conditions and dedicated, cooperative resources. Since the merger environment does not allow for any of these your schedule may be different.

If you are working with a training specialist a schedule will probably already exist. If you are working alone you can use your best judgment or make an appointment with a training specialists for help.

There are several forms included with this guide. Half (D1–M5) are part of your deliverables. The other five (M1–M6) are management tools for your personal use and are not considered deliverables.

## Instructional Planning Guide

With the following outline to help, you will be able to design a training program within seven days for any training design situation CMS Project Management can throw at you. Your training design will contain the following Deliverables the last of which is due at the end of training:

- Audience Analysis
- Task/Topic by Unit Matrix
- Topic Task Analysis
- Individual Development Plans
- Training Schedule
- Training Material
- Training Certification Material (test)
- Follow-up Report

The players (besides yourself):

- James Cribb (Training Projects Manager)
- Gina Morey (Training Administrator)
- The Project Manager (PM)
- The Subject Matter Expert (SME)
- Managers of the units involved
- The Trainees

## Day 1: Setting the Stage

**Deliverable due: Audience Analysis**

**Next Deliverable: Task/Topic by Unit Matrix**

Your very first step is to set the stage. You have to know *who* and *what* needs to be taught, and to do that you need to conduct three interviews.

1. the PM interview
2. the SME interview
3. the Unit Managers interview

It is crucial that the information you receive from these people is accurate and complete the first time because you may not be able to find them more than once a week, and because you would hate to redo work due to wrong initial data.

The following groups of questions will help your interviews off to a good start. You may want to tailor them to your specific needs by adding or subtracting questions.

### 1. The PM Interview. (Management Form 1)

CMS Project Managers are quick moving and are rarely found in their cubicles, but it is extremely important to corner one because they can provide the foundation for your work.

The things you should ask of the PM:

- What new thing is being implemented that requires training?
  - When is the best time to get a hold of you and how?
  - Can we set up regular short meetings so we can touch base?
  - Who are the trainees and what are their names and phone numbers?
  - Who do they report to and what are their phone number?
  - Is someone already designated as the trainer? If so who is it?
  - Who is the SME
  - Where are the trainees located?
  - What location are they to be trained at?
  - Why do we need to train them?
  - Do you have a FAR (Functional Area Review) or any other background material for me?
  - Who is the Subject Matter Expert and what is his location and phone number?
  - What is the training window?
- The PM Interview (cont'd.)
- Who else should I talk to?
  - Where else can I find out more information?

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