Manage Training Projects

Project management is a critical skill for the training profession. It enables us to create the solutions so critical to the success of the organizations we support. **BY ROSS TARTELL, PH.D.**

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In 2015, *Training* magazine published an article about the importance of project management as part of a trainer's responsibilities. In that article, Wolters Kluwer Global Vice President of Talent Development Katie McSporran noted, "Whether the initial request is for a needs assessment, training/talent strategy, training program/curricula, implementation support, and/or performance consulting, project management is a fundamental competency for scoping and planning the work, gaining alignment on approach and commitments, and managing expectations" **(https://trainingmag.com/trgmag-article/accidental-training-manager).**

Things haven't changed since 2015. Great execution saves time and money—and increases performance. Here's how it's done:

The typical training project has four steps connected by feedback loops that help you recalibrate any of the previous steps:
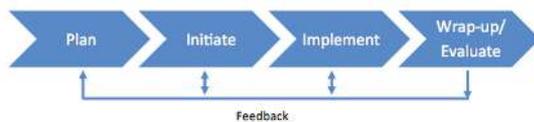
PLAN
Good up-front planning ensures that the project is focused on a realistic solution and defines the boundaries of the effort, minimizing the "scope creep" that is a common pitfall. The planning phase must answer the following questions:

- **What** is the project rationale? What problem or opportunity will the effort resolve or achieve? What are the project goals/deliverables? Are the deliverables to provide information, give a recommendation, or implement a solution?
- **Who** is the client/sponsor? Who gives approval and what is the approval process? Who are the stakeholders affected by this project?
- **When** does the project need to be finished? What is the sequence of project steps and milestones that create the project plan and calendar?
- **What resources,** such as people, budget, and other assets (e.g., meeting space, technology, outside expertise), are needed to ensure success?

Planning stage outcomes are:
- Identification and agreement on the resources, logistics, and project plan
- Well-defined outcomes with support and buy-in from key project stakeholders
- Approval to proceed

INITIATE
Now you'll need to create the implementation team, with guidance from the sponsor. Great teams have the necessary technical competence, or access to the specialized knowledge, to move the project ahead. In addition, team members need organizational permission to dedicate the required time, and must have the motivation and teamwork skills to work together.

The second step is team chartering and launch. The project team needs to understand and commit to the project goals, team roles, and the rules governing how to work together. Common tools used in this phase are the GRPI Model (Goals, Roles, Processes, and Interpersonal Relationships) to help diagnose issues affecting team performance, and the RACI Chart (Responsibility, Authority, Consulted, Informed) to clarify roles and decision-making responsibilities. (Visit **www.trainingmag.com** for my How-To articles on these topics.)

This stage also includes any needed revision of the project plan, based on feedback gathered during team creation and project launch.

IMPLEMENT
There are three keys to success in this stage. First, an operating rhythm helps the team know when they will meet, how to conduct meetings, and what they will do to execute the plan. Second, contingency planning keeps critical milestones under control when inevitable problems arise. Third, stakeholder analysis enables the Training professional to focus communications and manage politics.

WRAP-UP AND EVALUATE
Conduct a project briefing with the project sponsor and client to review the project purpose, outcomes, follow-on actions, and lessons learned. Also reallocate remaining resources and inform key stakeholders of the final project status.

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