



Project Management

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Introduction

In Competence Unit 7, you will learn more about Project Management based on **PM² Methodology**. This European Methodology provides a project governance framework, process guidelines and a set of effective mindsets, leading to increased project efficiency and success.

At the end of this Unit, you should:

- ➊ Become aware of the importance of adopting a systematic approach to effective project management for the use of the ID project;
- ➋ Know the different areas involved in project management (scope, time, budget and cost, HR, risk and communication) and the impacts of mismanagement in the ID project;
- ➌ Be introduced to the main processes, techniques, and tools to support the management of their projects.

As a future Instructional Designer, you should also take advantage of the several tools we provide, to support the management of projects where high-quality content is being developed, while incorporating environmental sustainability practices.

Don't forget to always have critical thinking! You should also consider the context you're in since you need to be flexible and be able to adapt to new situations and cultures within the context of the client's reality.

The main learning outcomes result in the seven main topics presented in this:

- Project Management methodology;
- Scope Management;
- Time Management;
- Budgeting and Cost Management;
- Human Resources Management;
- Communications Management;
- Risk Management.

Aligned with areas of Instructional Design, Cognitive Psychology and Psychology of Learning.

Let's get to work!



Project Management Methodology



As you know, a successful project ends when its objectives have been achieved and all deliverables have been produced and accepted by the client.

Projects are different from normal day-to-day work, so the best way for you to manage them, is by using a special temporary organizational structure in order to:

- Define the project scope and its deliverables (e.g. learning course);
- Create a justification for the investment in the project (by defining the project's value for the organization, outlining the context, etc.);
- Identify project stakeholders and define the project team members;
- Create the project plan to help guide and manage the project;
- Monitor and control the project daily (progress, changes, risks, issues, quality, etc.);
- Hand over the deliverables and administratively close the project.

As a Project Manager, you need to have the competences required to effectively manage the initiation, planning, execution, control and closing of a project:

People Competences	Perspective Competences
● Self-reflection and self-management ● Personal integrity and reliability ● Relationships and engagement ● Leadership ● Conflict and crisis management ● Resoucefulness ● Negotiation ● Results orientation	● Strategy ● Governance, structures and process ● Compliance, standards and regulation ● Power and interest ● Change and transformation ● Culture and values

Source: **PM² Material | PM² Project Management Methodology (europa.eu)**

With this, you need to understand:

- The project management methodology used in your organization (e.g. PM² Methodology, Agile, etc.);
- How to communicate, lead, motivate, negotiate, solve problems and deal with issues, conduct meetings and workshops and report project status;
- The general project context and environment (e.g. sociocultural, political, physical);
- Organizational policies and standards (e.g. security, organizational architecture, audits, etc.);
- How the end-product will be maintained after it is delivered.

In the scope of Project Management, we recommend using the PM² Methodology to improve the effectiveness of management, by clarifying expectations as early as possible in the project's lifecycle (and defining it), also by providing guidelines for Project Planning and Human Resources, providing tools and methods to improve your work and giving the client exactly what he envisioned.

So what are the main phases of a **Project Lifecycle**?

The Project Lifecycle is the duration between the start and the close of the project and includes the Initiating, Planning, Executing and Closing phases. The project lifecycle starts with the Project Initiation Request and ends once the Closing Phase activities are completed, and the client performs the final acceptance:

1 Project Lifecycle Description



Free adaptation from: [PM² Material | PM² Project Management Methodology \(europa.eu\)](#)

2 Project Lifecycle activities

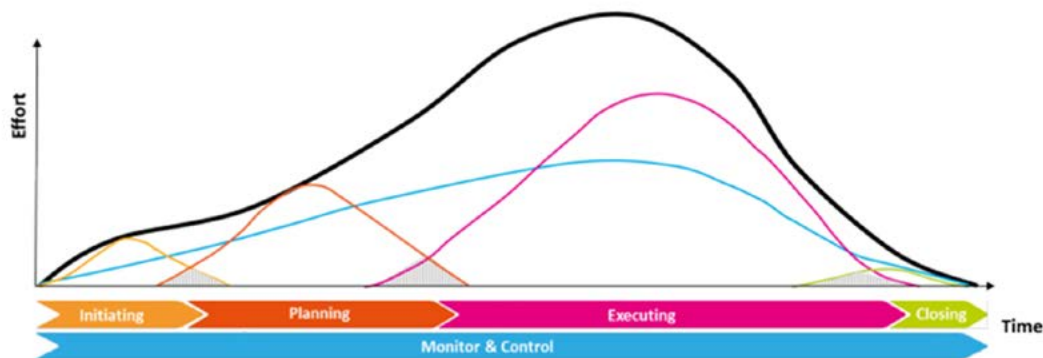


Free adaptation from: [PM² Material | PM² Project Management Methodology \(europa.eu\)](#)

It is also crucial to understand the correlation between Effort and Time. The effort and duration estimates are used to create the project schedule and budget (that you will learn in the next chapters).

The Project Lifecycle also stresses the relevance of self-efficacy as a motivational tool, that allows you as an individual to seek out challenges as an opportunity to learn in the area of Instructional Design. A project moves on to the next phase when the goals of its current phase have been deemed achieved as the results of a formal (or less formal) phase-exit review.

➤ Project Lifecycle



Free adaptation from: [PM² Material | PM² Project Management Methodology \(europa.eu\)](#)

Project Phase Lifecycle & Tools

According to the project lifecycle illustrated above, these are (some of) the tools you can use, according to each phase of the project:

Project Phase	Key Tools
1 Initiating 2 Planning 3 Executing 4 Closing 5 Monitor & Control (transversal)	• Project Initiation Request • Project Charter • Project Status Report ; Project Handbook (only if the project has a long duration); Project Work Plan • Project-End report • Decision Log; Risk Log

Project Initiation Request – Formalizes the commitment to explore a problem, need or opportunity further and captures the context.

Project Charter – Visual Representation of the project.

Project Status Report - Is a frequent report (e.g. every 1-2 months) that contains just a one-page summary of the project status. We recommend using this tool only in long-term projects.

Project Handbook - Summarizes the project objectives and documents the selected approach for achieving the project goals, and documents the project governance roles and their responsibilities, and defines the plans necessary for managing the project (you can use this tool only if the project has a long duration).

Project Work Plan - Includes a breakdown of the work to be carried out, estimates of the effort and costs involved, and the project schedule.

Project – End Report - Summarizes the project experience, project performance and Lessons Learned.

Decision Log - Contains a summary of project decisions taken.

Risk Log – Identifies the risks associated with the project and the measures to mitigate them.

The focus of a project shifts from initiating and planning activities in the beginning to executing, monitoring, and controlling activities in the middle and acceptance, transitioning, and closing activities at the end.

In the Planning Phase of the project, you need to create a checklist to ensure that all the needs and requirements defined for the project are implemented.

You need to always ensure project quality management, in order to achieve the expected results in the most efficient way and with the highest quality, and also that deliverables will be accepted by the client/stakeholders. This involves overseeing all the activities needed to maintain a desired level of excellence: including performing quality planning, quality assurance, quality control and quality improvement throughout the project until the Closing Phase.



Scope

Management



The easiest way for you to identify the scope of the project is by discussing its requirements with the client and/or other relevant stakeholders. Ensure that all stakeholders share the same expectations on what is to be delivered. In the Kick-off Meeting, it is essential that you make sure everyone is on the same page regarding the project scope.

Accordingly, with the Project Lifecycle that was mentioned earlier, the scope of the project needs to be identified right away. With this, you can easily ensure that deadlines are met, and efficiently allocate resources to the project. Do not forget that Scope management is also key to staying on budget as well.

Do not underestimate the significance of the work done in the initial project phase and start working on deliverables that are inadequately defined or planned. Because this can result in the delivery of products with poor quality and of little value to end-users. This is a common and costly mistake, which is often the root cause of overall project failure. You are responsible for delivering high-quality products within the identified objectives and constraints, ensuring the effective use of the allocated resources.

There are several tools you can use, such as:

1 Project Charter

The Project Charter provides a basis for more detailed project planning. It defines the project's objectives, high-level requirements, risks and constraints, as well as the project milestones and deliverables (The PM² Methodology Guide v3.0.1,P.36).

It includes information regarding the project scope, cost, time and risks, as well as information such as milestones, deliverables, and project organization and approach. It is also a key element of the project approval process, since it includes the what, how and when fundamentals of the project, providing a baseline against which progress can be determined.

Key Participants & Steps in a Project Charter

Key Participants	Steps
Project Manager	Develops the Project Charter - assesses whether the project is ready to initiate the Planning Phase
Client	Reviews the Project Charter - A review and approval are recommended before the project can formally move to the next phase (planning)

Source: ISQe

There are some guidelines you need to be aware of when preparing a Project Chart:

- The Project Charter should be brief so that it can be sent to the client as soon as possible, and so that it is easy for them to review and understand;

- Avoid presenting detailed requirements. Instead, present high-level needs and features;
- Make sure that all inputs from the client is considered;
- Make sure that once created, the Project Charter is updated and distributed as required;
- Through the process, if the project's vision/scope has changed, an updated Project Charter should be submitted.

Using project charts can **benefit your team** at all levels:

- Individual contributors have a clear way to visualize upcoming work;
- You can ensure enough resources to hit their goals on time;
- Stakeholders get a better understanding of the work to come.

2 Decision log

A Decision Log contains a summary of project decisions taken, by whom they are taken, when decisions are to be implemented, as well as to whom they should be communicated. It is also important to write meeting minutes and share them with the team and clients, so everyone is on the same page.

The transversal purpose of monitor & control is to collect information about the state of the project's progress and overall health. In this case, the project manager is responsible for tracking the scope (in all its dimensions). This information is then distributed to the client as per the Communications Management Plan we are going to address later.

How to use a Decision Log?

You can use a Decision Log whenever there's a decision made in the project. Include any decision that has an impact on the project, because it's a way to communicate with the client and a way for them to support the decision.

Consequently, a project Decision Log is not important as you are writing it, but more so when you are put in a position to defend your decision regarding the project.

See this example you can use as a reference when developing a Decision Log:

Decision Identification and Description

ID	The decision identifier.
Category	Decision category related to the area affected by the decision (e.g. business, IT, people & organization, external or legal).
Title	Short title for the decision.
Description	A description of the decision's details and impact, if applicable.
Identified by	The name of the person who identified the need for a decision.
People present	Log the names of those present when the decision was made. Reference can be made to the relevant Minutes of Meeting (MoM) if appropriate.
Decision date	Date on which the decision was taken.

Source: Free adaptation a PM² Decision Log

Decision Implementation

Date of Application	The date on which the decision is applicable.
Decision communication to	The group, teams and other audiences to whom the decision should be communicated.

Source: Free adaptation a PM² Decision Log

With this tool, it's possible for you to keep the client updated on who authorized a decision and how it came about. Having a project decision log, make it accessible to all people involved in the project.

It is important for you to remember that decisions don't just happen in scheduled meetings: they can also be made in casual meetings with the client or between a couple of team members, by email and/or telephone.

You also can use these free project management templates to track these decisions, using Decision Log Templates such as [Sample Templates](#) or [Word Templates Online](#).





Time

Management



Time Management is the process of planning tasks and deadlines, to share with the team members and with the stakeholders for approval.

A good Time Management plan can lead to improved efficiency and productivity, less stress, and more success in the development of projects.

Some of the **advantages** of managing time effectively:

A Stress Relief

Making and following a task schedule reduces anxiety. As you check off items on your “to-do” list, you can see that you are making tangible progress;

B More Ability to achieve goals

Good time management provides achieving goals and objectives more efficiently and in a shorter length of time.

And how can you manage time effectively? There are some tips you need to consider:

1 Set Goals Correctly

The key is to Set goals that are achievable and measurable;

2 Prioritize wisely

Prioritize tasks based on importance and urgency;

For example, look at your daily tasks and determine which are:

- ✓ **Important and urgent** = You need to do these tasks right away!
- ✓ **Important but not urgent** = You need to decide when to do these tasks
- ✓ **Urgent but not important** = You need to delegate these tasks (if possible)
- ✓ **Not urgent and not important** = You can set these aside to do later

3 Set a time limit to carry out a task

Setting time constraints for completing tasks helps you be more focused and efficient. Making the small extra effort to decide on how much time you need to set aside for each task, can also help you recognize potential problems before they occur;

4 Plan ahead

Consider making it a habit to start every day with a clear idea of what you need to do get done **that day**;

5 Take a break between tasks

To stay focused and motivated is crucial for you to take a break while doing these tasks. It allows you to start/continue working with a clear head and feeling refreshed.

On the other hand, **poor time management** can result in:

1 A Poor Work Flow

If you don't plan ahead, you could end up having to jump back and forth, in doing your work. That will translate in a reduced efficiency and lower productivity;

2 Poor quality of work

If you need to rush to complete tasks at the last minute, usually this will compromise the quality of the work that you're doing;

3 Loss of control

You need to be always in control of the tasks you need to get done.

To avoid situations like this, you can use several **Time Management Tools & Methods:**

● **Project Scheduling**

Project Scheduling aims to identify dependencies between tasks, to assign resources for each task, to identify task start and end dates, and to work out the overall project duration (The PM² Methodology Guide v3.0.1,P-.103).

What is the difference between **Project Planning** and **Project Scheduling**?

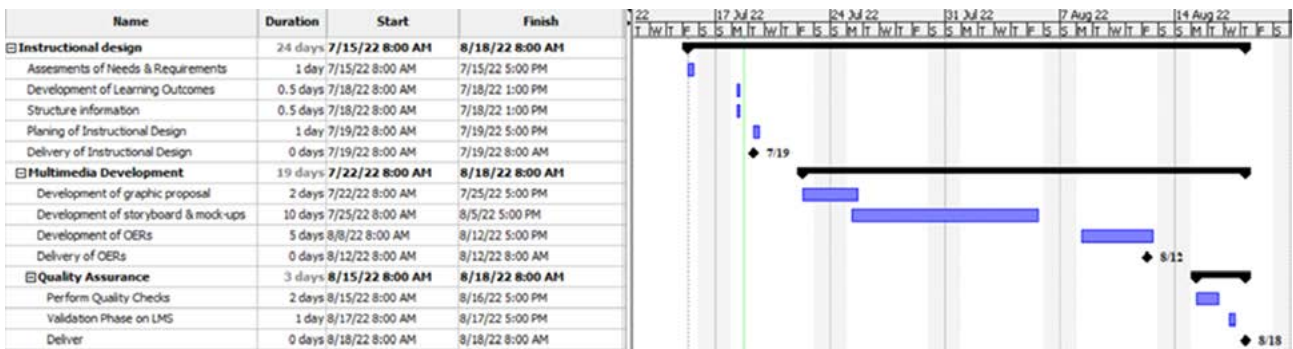
- **Project Planning** involves selecting the appropriate policies, project methodologies and procedures required to deliver the project on time.
- **Project Scheduling**, on the other hand, converts the plans, scope, and cost into an operational timeline of the project.

Different scheduling methods and representations can be used, such as Gantt charts.

● Gantt charts

Gantt charts are a project management tool used to represent the schedule, phases and activities of a project in a single visual way (illustrates a project schedule). It focuses on project sequence, duration, dependencies, and status in a manner that is easy to understand.

You can make a Gantt chart in an excel document, or you can use a project management software such as **Project Libre** or **Microsoft Project**



Source: Example of a Gantt Chart using Project Libre by ISQe

Don't forget! Gantt charts also should be easy to access by everyone involved in the project.

● Critical Path Method (CPM)

Another technique that you can use is the Critical Path Method. CPM is a modelling technique that shows the longest necessary path (e.g. the longest unavoidable duration) of planned activities from beginning to the end of the project, otherwise known as the critical path of the project. This technique helps to understand which activities have a critical influence on the overall duration of the project.

It also represents the shortest possible duration of the project to completion. Based on this information, activities can be prioritized in order to shorten the duration of the critical path by pruning the critical path activities, performing more activities in parallel or adding more resources.

If you want to always know your project critical path, we advise the use of a Project management software, as it is too complex and time consuming to assess it manually. You can do it using the **Critical Path Diagram Generator** or another project management tool referred previously.

● **Project Scheduling - Development of a timeline and implementation plan for the LMS**

When planning the project schedule and carrying out the Learning Management Systems (LMS) implementation and plan, you need to create a realistic timeline for the process. The implementation process length also depends on which type of LMS you choose, for example, Cloud-based LMS typically takes 6-10 weeks to implement. However, the timeline can range from 4-12 weeks, depending on the scope of the project. Factors like the number of user accounts and the complexity of integrations can influence your project timeline.

It is important to remember that this plan is not set in stone. In fact, roadblocks often pop up along the way. You can prevent them from affecting your overall timeline by building in small time buffers for more substantial tasks like data migration.

➤ **Budgeting & Cost Management**

Budgeting and Cost Management is needed for you to define the overall budget, and budget per task communicating it to the client/stakeholders. It is necessary to manage the project costs to ensure budget compliance.

Cost Management is one of the main functions of Project Managers. When incorporated with the scope of the project and time management, these three functions form the core of Costs Management.

Cost management function

The Cost Management function is the process that is required to maintain financial control of the projects.

Within you have several techniques such as:

Cost Estimation

Cost estimation is the process of assembling and predicting costs of a project over its lifecycle. This helps you to determine whether a project is economically and technically viable, and if sufficient funding can be obtained for the project to be implemented.

Cost Budgeting

Cost budgeting is the process of establishing budgets, standards, and a monitoring system by which the investment cost of the project can be measured and managed.

This process is only possible once the budget is approved by the client, at the beginning of the project.



Resource Planning

Resource Planning outlines expectations of the resources needed, and the time required to complete each project task, within the constraints of resource availability and capabilities.

This planning includes both human and non – human resources:

Human Resource Planning:

Human Resources					
Resource ID	From Date	To Date	Resource	Skill Level	Quantity
H.1	10/01/2021	20/08/2021	Instructional Designer	Advanced	2
H.2	10/05/2021	20/09/2021	Designer	Intermediate	1
H.3	10/05/2021	20/06/2021	Training Technician	Experienced	2

Source: Example of a Human Resource Plan by ISQe

Non – Human Resource Planning:

Other Resources					
Resource ID	From Date	To Date	Resource	Skill Level	Quantity
M.1	10/01/13	20/08/2021	Licenses	Dedicated	100
M.2	02/05/13	22/09/2021	Laptop	Office 2010	3
M.3	02/05/13	22/09/2021	Training Room	30 seats	1

Source: Example of a Non-Human Resource Planning by ISQe

You can also create a Cost of Resources chart, to help keeping you on budget, and have another view of the costs defined:

Cost of Resources:

All Resources				
Resource ID	Resource	Cost per unit	No. of units	Total cost
H.1	Consultant	500€ per pd	40	€ 20.000
H.2	Legal Advisor	400€ per pd	20	€ 8.000
M.1	Licenses	800€ per connection	100 connections	€ 80.000
H.3	Trainer	500€ per pd	10	€ 5.000

Source: **Artefacts | PM² Project Management Methodology (europa.eu)**

Subtitle

- **Resource ID** – unique resource ID to identify the resource (people or other).
- **Date (from/to)** – identifies the dates that the resource (people or other) is needed for the project.
- **Resource** – identifies the resource roles (people or material) that is concerned.
- **Skill level** – identifies the required skill level to guarantee the quality of the project deliverables.
- **Characteristics** – any characteristics that this resource must have.
- **Quantity** – identifies the quantity of the resources needed.

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- **Quantity** – identifies the quantity of the resources needed.

Subtitle

- **Pd** – person day.
- **Cost per unit** – identifies the cost per resource unit for the specific resource.
- **No. of units** – identifies the number of units needed for the specific resource.
- **Total cost** – identifies the cost for the specific resource.



Human Resources Management



The more challenging management activity is managing the Human Resources, so it is imperative that you provide positive dynamics and demonstrate leadership skills while motivating the project team.

You can use methods such as negotiation, conflict resolution, and people management techniques to ensure smooth collaboration among all team members and the effective progress of the project work, performing regular quality checks.

Although the Instructional Designer may not have the authority to hire someone, you need to be aware of how the Human Resource Management (HRM) works in your company, how recruiting, hiring, deploying, and managing employees is made, and what is the scope of your responsibilities as a project manager and how/when you should report to the unit coordinator.

In this context, the main goals of **HRM** are:

- Support the project in achieving its objectives by developing and implementing human resources strategies;
- Contribute to the development of a high-performance culture;
- Ensure that the project has skilled and engaged team members, or that the Project manager has resources available to choose from, with the right skills;
- Create a positive employment relationship and a climate of mutual trust.

Human Resources Management Steps

Building The Team

As an Instructional Designer Project Manager, you may not have the power to hire your human resources, but you can and should choose/suggest the team members you find more suitable to work on its specific project.

A recruitment process is an organization-specific plan for finding new candidates and employing top talent. Recruitment is a painstakingly collaborative process. You must understand requirements from the organization you're in, select the candidates, organize interviews, make offers, follow-up and do so under a rigorous timeline.

In this phase, it is very important to select the best human resources to work on the project. Review the project list of requirements and match it to the skills set you need to achieve the best results.

But don't forget... stay inside the budget!

There are some practices you need to consider when selecting your team members:

Identify the skills-set' need

You need to determinate exactly what you're looking for in an team member. At the end of this process, you're hoping to find the "ideal team", so you have to start by determining what "ideal" means for each position. This step will impact every other part of the building the team process.

Ask yourself questions such as:

- Does the person have the right skills needed for the development of the project?
- Is the person available during the project duration?
- Does the person cost fit in my overall budget?

Don't forget! Unpredictable things may happen, and you may need to make adjustments to the team during the project duration (team members may get sick, have vacations, etc.).

Reward

It is also important to give the recognition and/or rewards for achieving goals and milestones with the expected quality to your team members, as a long-term motivator.

But rewards and recognition can be tricky. People are motivated in different ways, so there are several ways for you to give the recognition your team members deserve.

Informal Rewards:

- Verbalize the good work performed by a team member;
- Take the team out for lunch or for a fun bonding activity;
- Make the most of the company tools if there are any (eg. give a badge to a team member);
- Casual-dress Fridays or other fun ideas.

Formal Rewards:

- Special training or seminars;
- Tuition for job-related courses;
- Special assignments;
- Corporate award for outstanding achievement;
- Special bonuses;
- A recommendation for a raise.

Training

An Instructional Designer should be engaged in long life learning and in the constant update of its own skills. Also, when managing a team, be aware of the current skills and also the needs of the team, so you can recommend and/or provide specific training for them to improve and extend their skills set.

Value

We are always learning, in every project. Make sure that you guide discussions with your team and clients around the lessons learnt in each project. We can always improve our skills set!

Capturing lessons learned is a way for you to identify areas for improvement within a project for the purpose of improving the results of similar projects as a way to avoid certain downsides in the future. This type of information can be learned when managing the risks, quality issues, change requests and other activities.

The project manager can deploy techniques like brainstorming sessions, reviewing projects reports, project questionnaires/surveys during the lifecycle of the project.

To avoid making the same mistakes twice, lessons learned should be shared with all the team members. Leading to process improvements, like enhanced checklists and templates or for example, more effective training courses.

Planning

Planning ensures productivity and longevity and anticipates human resource changes and other potential threats and weaknesses of the project. This way you can make strategic decisions with the future in mind.

Don't forget to **plan ahead** regarding your team members absences (e.g. vacation periods or holidays, medical leaves, parental leaves, etc.). Keep in mind that you will have to deal with unpredictable absences as well (e.g. sick leaves).

Steps In Human Resource Planning

1 Analyze Organizational Strategy

- Start by being aware of the Human Resources Planning' process.

2 Know the Current Human Resources

- Total number of team members;
- There is a specific set of skills;
- How each individual person works and personality traits;
- Team and individual potential and interests.

3 Forecast Future Needs

- Instructional Design is an area which uses a lot of technological tools that are updated and created each day. Make sure the team has the skills (or arrange training for them to have) that will be needed in future projects that may encompass the use of new technologies.

4 Estimates Gap

- Armed with the information you've gathered so far, you can estimate whether there are any gaps in your team strategy - Will you need more people in your team? If so, how many?

5 Formulate An Action Plan

- Design an individual action plan for each team member.

6 Monitor, Evaluate, And Adjust

- Monitor the new practices, evaluate them for their effectiveness, and adjust as necessary. In addition to monitoring your team, it's also beneficial to zoom in on how any changes made affect the individual team member.

Coaching

As a project manager you should always support your team. Make time for team meetings, as well as one-on-one conversations, so you can know how to best assist them.

Rapport

Building a good rapport with your team members is essential to effective coaching. You can use some of these steps to ensure a genuine relationship to help your team members to reach their full potential:

● Building Rapport & Relationship

Always speak with respect, using non-violent communication skills and from a place of empathy.

● Asking effective questions

Asking questions to find out potential issues that might be prevented, to get to your team on a deeper level and to build a trusting relationship.

● Listening

Listening and showing you are listening - reflecting back and/or summarizing what you have heard, asking clarifying questions, trying to speak after you have heard first.

● Providing Feedback

Try to start by providing positive feedback (e.g. nominate skills you appreciate or that are important to the project) and only after provide constructive feedback, in a clear and assertive manner. Allow them to ask questions and clarify ideas in the end.

In a nutshell, as a project manager, you need to adopt a position that is:

- Genuinely interested in your team members and be prepared to find out more about them;
- Ensure the company culture supports the relations among employees;
- Take time to build rapport and trust;
- Be clear about boundaries;
- Use empathetic listening – and really listen;
- Be aware of the impact of your own behavior;
- Lead by example.

You can also contribute to prevent employee turnover, since increasing employee retention has a direct impact on business performance and success (e.g. resignations, transfers).

So how can you support the company strategy for employee retention?

- Support your team members along the way! Be their best motivator;
- Support team members' careers through mentorship programs and lifelong learning opportunities;
- Push for regular reassessment of industry compensation standards within your company;
- Foster a culture of growth and development among your team;
- Prefer a result driven approach by allowing your team to choose where and when they do the work as long as timelines and quality criteria are respected;
- Invest in schedule flexibility, not forgetting to define ahead of time for team colab time slots;
- Prioritize Work-Life Balance approaches.





Communications Management



If you are dealing with longer or more complex projects that involve a higher number of stakeholders, you may want to develop and share a Communication Management Plan. However, for simpler and shorter projects, this information can be inserted in the Project Workplan as well.

These ensure that all project stakeholders have the information they need to perform their roles throughout the project. Defines and documents communication activities, their goals, content, format, frequency, and audience. It also defines how to communicate project status and the assignment of activities to the various stakeholders.

This activity is performed during the Executing Phase that aims to regularly communicate project information to project team and clients (The PM² Methodology Guide v3.0.).

To inspire and motivate relevant stakeholders to get you the support needed to achieve valuable outcomes, it is essential to demonstrate effective communication, persuasion, negotiation and leadership. Planning and executing project communication activities is essential for project success.

You will have different approaches for reaching different people. Take into consideration cultural and individual differences when selecting your style of communication and also your means to reach them.

Every culture has its own set of tacit assumptions and tendencies when it comes to face-to-face interactions and trying to get your point across effectively can sometimes be difficult. Even when a language barrier doesn't exist, cross-cultural communication can be challenging.

There are **eight tips** you can use in situations like this:

1 Maintain etiquette

Many cultures have specific etiquette around the way they communicate. Before you meet, research the target culture.

2 Avoid slang

Not even the most educated non-native English speaker will have a comprehensive understanding of English slang, idioms, and sayings.

3 Speak slowly

Even if English is the common language in a cross-cultural situation, it's not a good idea to speak at your normal conversational speed. Modulating your pace will help, as will speaking clearly and pronouncing your words properly.

4 Non-violent communication (NVC)

You need to have a set of principles that support living a life of compassion, collaboration, courage, and authenticity. Sharing "power with others" rather using power over other" (Rosenber,2015)

5 Keep it simple

In a cross-cultural conversation, there's no need to make it harder for both of you by using big words. The less is more, keep it simple!

6 Practice active listening

Active listening is a very effective strategy for improving cross cultural communication.

7 Use your sense of humour wisely

Many cultures take business very seriously and believe in behaving professionally and following protocol at all times. Therefore, they don't appreciate the use of humour and jokes in a business context. If you do decide to use humour, make sure it will be understood and appreciated in the other culture.

8 Pronounces his/her/they

Be aware about the gender identities' and use the pronoun preferred by the person that you're talking to.

You also need to consider the ways you approach people from the same culture as you, but from **other generation**, in the context of your workplace.

There are some **tips** to help you as well:

1 Gain generational awareness

A general awareness of how each generation approaches communication is key to closing the communication gap.

2 Defer to the person you're communicating with

Use generations as clues and defer to the communication preference most widely used by that generation.

For example, people around 50 years old who want to connect with younger colleagues should not call and leave a voicemail. Instead, they should be using text or instant message. Conversely, when someone younger wants to connect with older colleagues, should not FaceTime or DM them on social media. Instead, defer to a phone call or face-to-face meeting.

3 Mirror the communication

Respond to communications using the same channel in which it was received.

For example, if a Gen X receives a text from a Millennial colleague, the Gen X should not call the Millennial but rather mirror the communication by sending back a text. If the communication is made orally, send at the end an email with the summary, so that there is a written record of your conversation. Nevertheless, respect company's rules and guidelines about communication.

4 Create a team communication agreement

Clearly communicating about how to communicate is essential in today's high-tech and digital work environments.

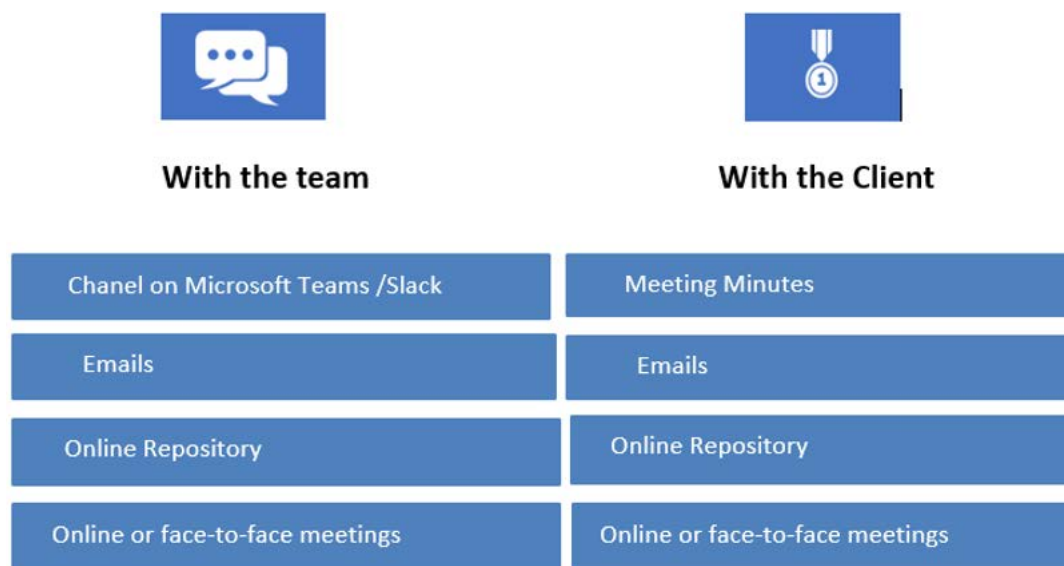
Whatever the case might be, communication always needs to be:



Source: Free adaptation from Artefacts | PM² Project Management Methodology by ISQe

Proactive Communication is also important in all projects, and it has to be frequent. This frequency must be planned in advance and communicated to the whole team members.

In the Communication Management Plan, you have some inputs you can use within this process:



Source: ISQe

Don't forget!

The communication especially with the client, must be written, so you can have proof /written record, in case of need or divergences in the project.

Some issues you face in instructional design are not connected with the essential “why” and “what” issues. Sometimes you know the project will be extremely productive but it is essential that you can properly communicate your ideas with others and give the right learning tools.

It is important to maintain constant communication with the client, and share the key elements with the client in all the Project Lifecycle, for example, deciding the instructional solution or determining constraints that may affect the design (e.g. available LMS and functionality available within the LMS) during the development of the storyboard or sharing the criteria for the available LMS regarding the Design Considerations, ID content development and ID implementation.

The communication among different parties for deciding the instructional solution or determining constraints that may affect the design (e.g. available LMS and functionality available within the LMS) during the development of the storyboard.

Instructional designers are tasked with making countless decisions in every project they complete. Questions ranging from “Who is my learning audience?” to “How will this project be evaluated for effectiveness upon implementation?” all require the instructional designer to make a variety of decisions (as you can see in the table above) to ensure that their instructional design efforts are contributing to efficiency, effectiveness, and ease of learning.



Risk

Management



Risk Management describes a continuous, proactive, and systematic process for identifying, assessing, and managing risks, carried out throughout the project to provide reasonable assurance as regards the achievement of project objectives (PM² Artefacts v3.0.1).

A **Risk management plan** gives visibility to risks, accountability as to how they are acted upon, and ensures that project risks are proactively dealt with and regularly monitored.

The **main objectives** of Risk Management are:

- Identify and report throughout the project;
- All major risks are reported to your superior;
- Risk response strategies should be in line with the availability to deal with the risk and within risk level thresholds;
- All risks are monitored and under control;
- Risk response actions need to be implemented effectively.

Risk Management Process Description

The process of Risk Management is divided into four steps:

1 Risk Identification

Facilitates the identification and documentation of risks that can impact the project objectives.

- Risks are continuously identified throughout the project lifecycle. However, very early during the Initiating phase, we advise you to create a risk list which is going to be frequently updated;
- The same procedure will be followed both for the creation of the Risk Log (that we referred to earlier) as well as for the inclusion of new risks later in the project.

2 Risk Assessment

Assess the likelihood and impact of the identified risks in terms of their influence to the project objectives.

- This assessment is necessary before any risk response planning can be done;
- Risks are assessed based on their likelihood of occurrence and the impact in project objectives, depending on the client (s) risk appetite, risk level bands will be defined based on which the most appropriate risk response strategies are chosen.

③ Risk Response Development

The purpose of this step is to select the best strategy and identify and plan the actions to manage the risks.

- Monitor and control the implementation of the risk response activities while continuously monitoring the project environment for new risks or changes in the risks already identified.

In this step, there are four strategies to be considered as risk responses: **Mitigate**, **Avoid**, **Reduce** and **Transfer** a risk.

3.1 Mitigate Risk Response Strategy

Is when you do something to reduce the impact or the probability of a threat.

E.g. - You don't want to start full-blown development to discover that the cornerstone technology can't provide the required functionality. To mitigate such risk, you have to begin with a Prototype or a Proof of Concept.

3.2 Avoid Risk Response Strategy

Is when you need to do something to eliminate the cause of the threat.

E.g. - When a client provides requirements for the project, they tend to pile up. This is when you need to develop a risk response strategy to remove a piece of the project scope (like get behind schedule for more than ten days).

3.3 Reduce Risk Response Strategy

This means to take steps to reduce the likelihood or impact of a loss. If the risk is just slightly above your appetite and tolerance level, then reduction is a reasonable strategy for bringing it down to within acceptable limits.

E.g. - The Client has a different project management approach; They have different quality standards; -Their team is not in sync with your team. There are many sources of risks here, so you need to reduce ALL possible risks from their side. But usually, you don't have direct control over them.

3.4 Transfer Risk Response Strategy

Unlike options 3.2. and 3.3. this strategy does not eliminate or reduce the chances of it occurring. But instead, delegates or transfers responsibility of the risk to a third-party.

E.g. - Now you are an ID Project Manager. Right away, there are huge sources of risks:

- You don't have the expertise and multimedia developers to start the project;
- There's no infrastructure and practices to run a software development project.

This is why many corporations decide to transfer such risks to other team members that can have more expertise, infrastructure, and human resources, in a certain field.

4 Cost Control

The purpose of this step is to monitor and control the implementation of the risk response activities while continuously monitoring the project environment for new risks or changes in the risks already identified.

You need to use the Project Follow-up Meetings to revise the status of risks and related actions, and to identify new risks that can impact project milestones. The review of the Risk Log also has to appear in the agenda of the Project Review Meetings, reporting the major project risks to the stakeholders.

For risk control you can also use another technique like desk reviews, questionnaires, and sessions of brainstorming.

● Risk Log

We suggest always having a Risk Log to insert risks as they are coming, in order to allow you to deal with them in the best way possible. You can use the template provided by the PM2 Methodology Artefacts, (PM² Artefacts v3.0.1):

Risk Identification and Description (Step 1)	
ID	The risk identifier. It should be numbered sequentially.
Category	Categories of risks related to the area affected by the risk (e.g. Instructional Design, IT development, Quality).
Risk Name	A short title for the risk.
Risk Description & Details	A description of the risk that may occur in the project and its causes. What kind of problems will the risk result in and risk dependencies?
Status	The risk status can be any of the following: Proposed: this is the initial status. Use this while the risk is identified. Investigating: use this to initiate an investigation. This will require an investigator to be selected and to initiate a task assignment. Waiting for Approval: use this to initiate approval. Before doing this, make sure that the investigation is complete and that the estimations shown are correct. Approved: this status is set when the approval process is successfully completed. Rejected: this status is set when the approval process leads to rejection. Closed: this status is set when the risk has been managed (e.g. mitigation actions have been implemented) and it isn't anymore a risk for the project.
Identified By	The person who identifies the risk.
Identification Date	The date when the risk was identified.
Risk Assessment (Step 2)	
Likelihood	A numeric value denoting the estimate of the probability that the risk will occur. The possible values are: 5=Very high, 4=High, 3=Medium, 2=Low, 1=Very low
Impact	A numeric value denoting the severity of the impact of the risk (should it occur). The possible values are: 5=Very high, 4=High, 3=Medium, 2=Low, 1=Very low
Risk Level (L*I)	The risk level is the product of the likelihood and impact (RL=L*I).
Risk Owner	The person accountable for the management and monitoring of this risk.
Escalation	To be escalated to the Directing or Steering Layers: Yes or No .
Risk Response (Step 3)	
Risk Response Strategy	The available strategies to deal with the identified risks are: - Avoid: risk avoidance, working the project or project plan around those conditions or activities which introduce the risk. - Reduce: risk mitigation or reduction through the proactive implementation of risk reduction activities. - Accept: acceptance of the risk. In this case, contingency plans can also be defined in case the risk occurs (active acceptance). - Transfer/Share: transfer or share a risk with other entities, e.g. through insurances, sub-contracting etc.
Action Details (effort & responsible)	Description of the action: objective of the action, scope, deliverables, person responsible and effort estimates.
Target Date	The date that the action is expected to be implemented.
Traceability/Comments	The ID(s) of the task (in the Project Work Plan) implementing the risk actions, or/and the IDs of related change, issue or decisions log entries. Any additional information related to the risk approval (e.g. date) or related to the risk actions (activities).

Source: Artefacts | PM² Project Management Methodology (europa.eu)



Green

Project

Management



As an Instructional Designer project manager, you're an essential agent of change.

So, you need to **truly think green** throughout the project, and make decisions that take into consideration environmental factors that can affect the entire project lifecycle and beyond. You need to do this, by starting to identify those green innovations and implementing them in your projects, when suitable.

To do so, there are two project management processes you need to consider:

- ❶ Creating a plan to **minimize** the environmental impacts of the project. This can include efforts to run the project more efficiently and effectively;
- ❷ The transversal project phase - Monitor & Control needs to mention the potential environmental impacts of the products developed.

With this, you need to see sustainability as a challenge in the new product development, always considering the resources consumed and the benefits provided (e.g., scope, quality, technical performance, features, and functions).

Your client (can be a larger audience of customers, internationally acting suppliers, foreign governments, as well as competitors) so it is imperative to reflect behaviors and requirements of stakeholders on all levels, to realize sustainable development as a coordinated process between all the parties involved, and not just a process between you and your team members.

In order to create a **sustainable project**, there are six principles that your project must adhere:

❶ **Commitment & Accountability**

Recognize the essential rights of all people to: healthy, clean and safe environments, equal opportunities, fair remuneration, ethical procurement, etc;

❷ **Ethics & Decision Making**

Implement ethical approaches to all aspects of project management, decision making with respect for universal rights & principles and the prevention of adverse short and long-term impacts on society and the environment;

❸ **Integrated & Transparent**

Foster the interdependence of economic development, social integrity, and environmental protection.

❹ **Principles & Values Based**

Conserve and enhance our natural resource base by improving the ways in which you develop and use technologies and resources;

5 Social & Ecological Equity

Consider human vulnerability regarding social and ecological disadvantaged contexts throughout the methodologies and products developed;

6 Economic Prosperity

Adhere to fiscal strategies, objectives, and targets that balance the needs of stakeholders, including immediate needs and the needs of future generations.



Conclusion



➤ Conclusion

Project Management is a transversal activity during the entire Instructional Design project duration.

An Instructional Designer needs to adapt to circumstances with resilience and focus on objectives by seeing challenges as a way to learn and apply other/new approaches.

The Instructional Designer also needs :

- Manage team and stakeholders' expectations according to the scope, budget, human resources, and risk within the project;
- Choose communication styles to apply with different stakeholders. Don't forget to take into consideration cultural and individual differences when selecting your style of communication;
- Incorporate sustainability values across the project management, by creating opportunities for joint action across communities, sectors, and regions. Committing to a change for a more inclusive and fair future for everyone;
- Keep the project team motivated and focused on achieving the project scope, objectives, and timings by increasing employee retention;
- Design with holistic project management perspectives in taking account of multi-stakeholders' perspectives, activity models, and improvement of problem situation using tools like the Risk Log and others.





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