Procure and Implement a…

It's never "just an IT Project"…

Business Agility Institute
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Case Study: https://bit.ly/2LJ3N1C

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The Context

- Crown Corporation
  - 1200+ employees
  - Recent transfer of some employees to embassies and consulates
  - Most training done in-house
  - Training content focused on own products/services

They hired…me….to lead

 &

Day 1 – Once upon a time…

SAMPLE

STATE OF WASHINGTON
<INSERT AGENCY NAME>

REQUEST FOR PROPOSALS (RFP)

RFP NO. _____

NOTE: If you download this RFP from an agency website located at:_____, you are responsible for sending your name, address, e-mail address, and telephone number to the RFP Coordinator in order for your organization to receive any RFP amendments or bidder questions/agency answers.

PROJECT TITLE:

PROPOSAL DUE DATE: _____ – Time, Pacific Standard Time or Pacific Daylight Time, Olympia, Washington, USA.

E-mailed bids will be accepted. Faxed bids will not.

ESTIMATED TIME PERIOD FOR CONTRACT: _____ – _____
The Agency reserves the right to extend the contract for up to two additional one-year periods at the sole discretion of the Agency.

CONSULTANT ELIGIBILITY: This procurement is open to those consultants that satisfy the minimum qualifications stated herein and that are available for work in Washington State.

CONTENTS OF THE REQUEST FOR PROPOSALS:
1. Introduction
2. General Information for Consultants
3. Proposal Contents
4. Evaluation and Award
5. Exhibits
   A. Certifications and Assurances
   B. Personal Service Contract with General Terms and Conditions

Sister Crown Corp

- 246-page RFP
- "We are doing that"…
  - Must be able to log on
  - ….
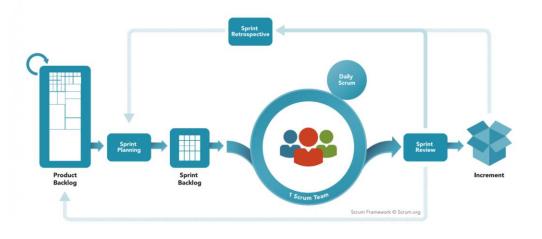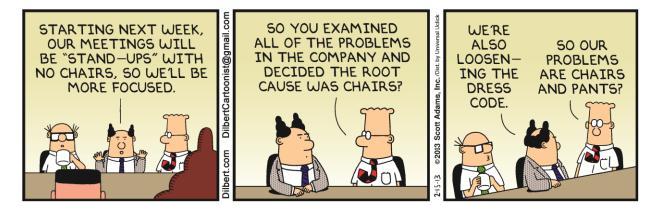
- Contract awarded 18 months prior….
- Still not implemented when we started…

  - *18 Months*
  - *$2.5M*
    - *$1M for LMS*

Day 3 – the plot thickens!

Use Scrum to do the procurement…

Uh oh, we didn't see that coming!

Welcome...

Yeah...no

Plain Vanilla Scrum
A.

Does it come in chocolate...?

By Clark & Vizdos

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ENTERPRISE ARCHITECTURE - A FRAMEWORK ™
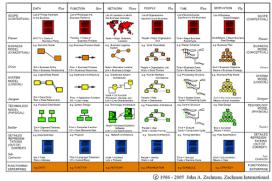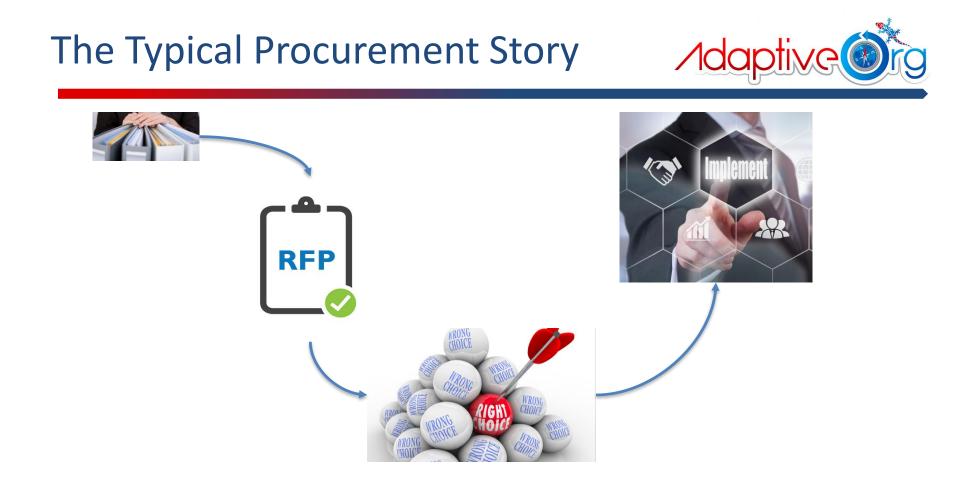
See www.ZachmanInternational.com for 2005 Zachman Framework Standards

TECHNOLOGY STANDARDS

TRENDS

Preferred VENDORS

The Typical Procurement Story

But what we really get is THIS...

The SOLUTION AS the definition of the PROBLEM!

Can we avoid the same old story?
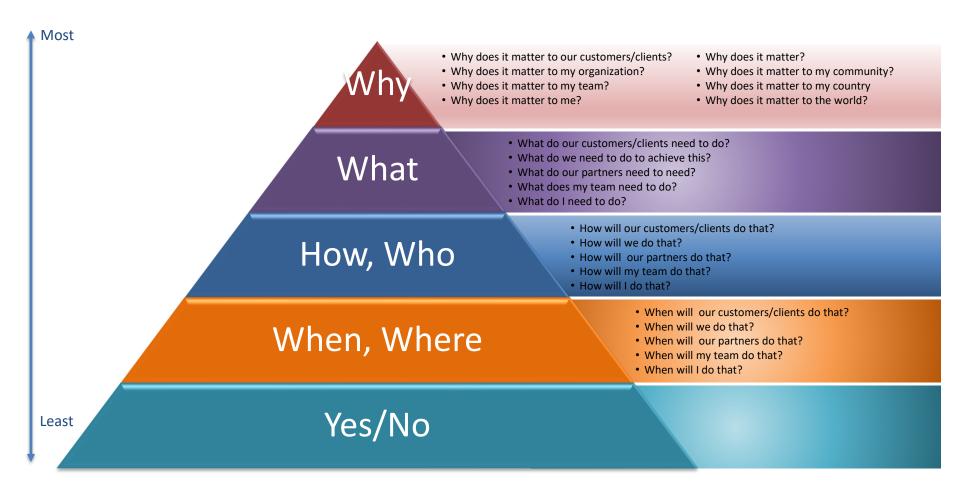
What if....

We design the business problem by asking the right questions?

Look'ey here!

Most

Why
- Why does it matter to our customers/clients?
- Why does it matter to my organization?
- Why does it matter to my team?
- Why does it matter to me?
- Why does it matter?
- Why does it matter to my community?
- Why does it matter to my country?
- Why does it matter to the world?

What
- What do our customers/clients need to do?
- What do we need to do to achieve this?
- What do our partners need to need?
- What does my team need to do?
- What do I need to do?

How, Who
- How will our customers/clients do that?
- How will we do that?
- How will our partners do that?
- How will my team do that?
- How will I do that?

When, Where
- When will our customers/clients do that?
- When will we do that?
- When will our partners do that?
- When will my team do that?
- When will I do that?

Yes/No

Least

Maybe the main characters can write the story?

There's a moral to every story…
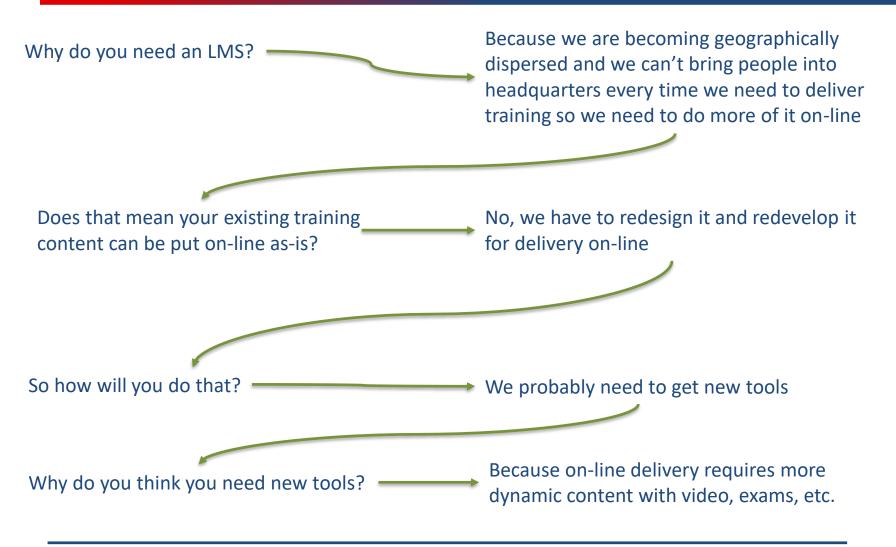
When we co-create a higher purpose,

it gets easier to make better choices

in the WHAT, HOW, WHEN, and WHERE

Which way do we go?

Why do you need an LMS?

Because we are becoming geographically dispersed and we can't bring people into headquarters every time we need to deliver training so we need to do more of it on-line

Does that mean your existing training content can be put on-line as-is?

No, we have to redesign it and redevelop it for delivery on-line

So how will you do that?

We probably need to get new tools

Why do you think you need new tools?

Because on-line delivery requires more dynamic content with video, exams, etc.

WHY questions…
lead to more questions

Do you think your existing learning content developers know how to develop for on-line?

Probably not

Do you have processes in place for how to develop content this way?

Not yet so we will have to develop them

Since the project is using an Agile approach, do you think that may work for your content creation work as well?

Yes it could so we'd like to know more

Do you have content management practices or tools in place for managing the new content you will be creating?

No, so I guess we will need to do that as well

A new story was emerging…

It wasn't just a "procure and implement an LMS" kind of story anymore….
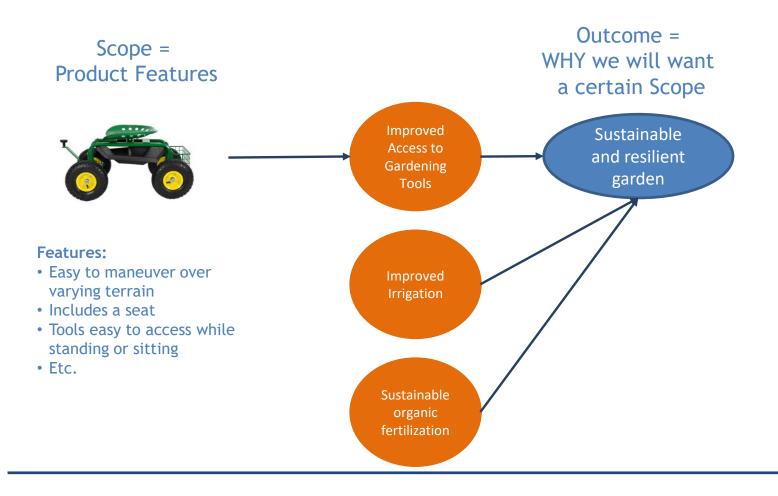
Most projects are a PORTFOLIO!
(masquerading as a project…)

WHY do we assume that our existing old story enablers (processes, roles and org structures, etc.) will remain The same after we write the new one?

Structuring a story

Scope =
Product Features

Outcome =
WHY we will want
a certain Scope

Features:
- Easy to maneuver over varying terrain
- Includes a seat
- Tools easy to access while standing or sitting
- Etc.

Improved Access to Gardening Tools

Improved Irrigation

Sustainable organic fertilization

Sustainable and resilient garden

Lots of possible descriptions – (i.e. Scopes)

We have a richer set of choices
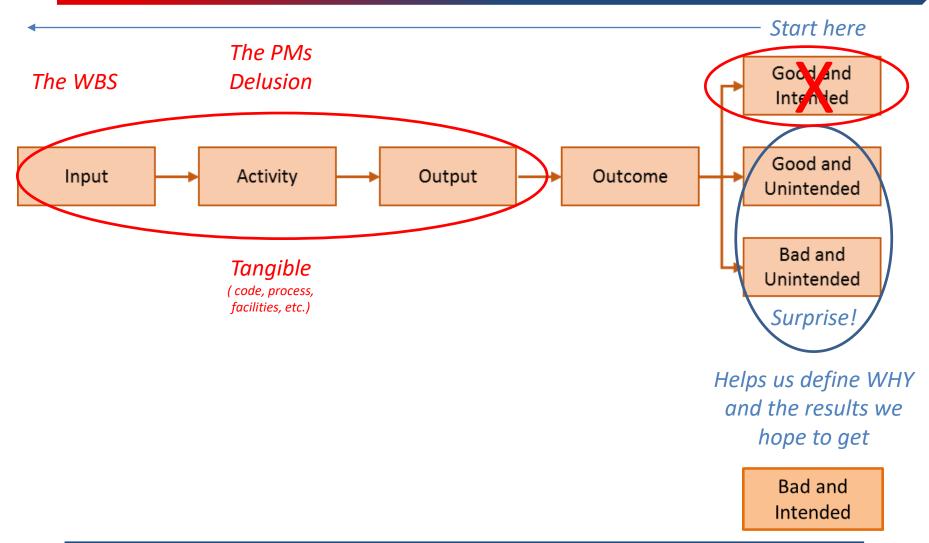
There are many possible "right answers" to satisfy a given Outcome

Back to plot building

Start here

The PMs Delusion

The WBS

Tangible
(code, process, facilities, etc.)

Surprise!

Helps us define WHY and the results we hope to get

Input → Activity → Output → Outcome → Good and Intended / Good and Unintended / Bad and Unintended

Bad and Intended
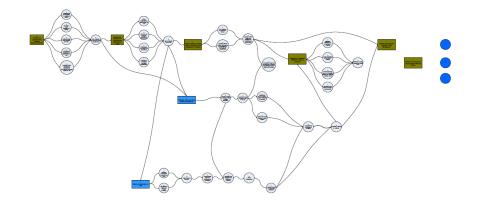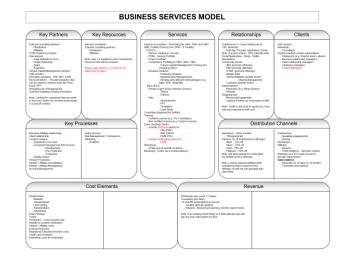
How did we craft the story?

Different audience..."Coles Notes"
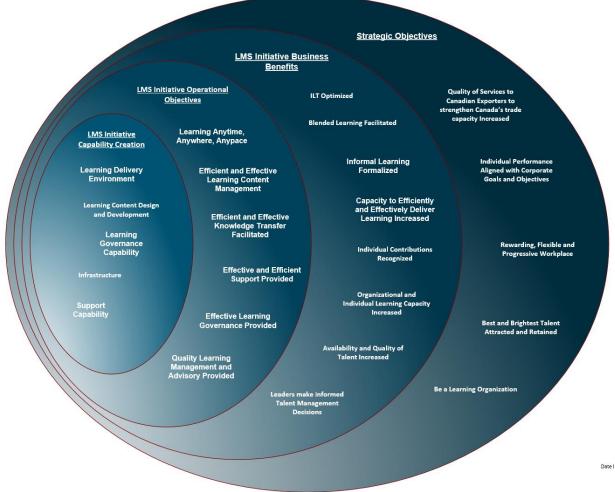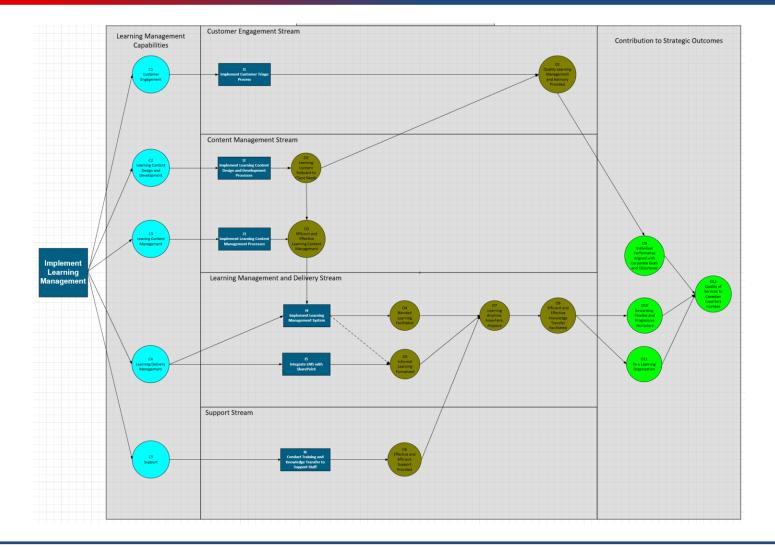
Strategic Objectives

LMS Initiative Business Benefits

LMS Initiative Operational Objectives

ILT Optimized

Quality of Services to Canadian Exporters to strengthen Canada's trade capacity Increased

Blended Learning Facilitated

LMS Initiative Capability Creation

Learning Anytime, Anywhere, Anypace

Informal Learning Formalized

Individual Performance Aligned with Corporate Goals and Objectives

Learning Delivery Environment

Efficient and Effective Learning Content Management

Learning Content Design and Development

Capacity to Efficiently and Effectively Deliver Learning Increased

Efficient and Effective Knowledge Transfer Facilitated

Learning Governance Capability

Individual Contributions Recognized

Rewarding, Flexible and Progressive Workplace

Infrastructure

Effective and Efficient Support Provided

Support Capability

Organizational and Individual Learning Capacity Increased

Effective Learning Governance Provided

Best and Brightest Talent Attracted and Retained

Availability and Quality of Talent Increased

Quality Learning Management and Advisory Provided

Be a Learning Organization

Leaders make informed Talent Management Decisions

Date I

Same story – different perspective

Know who your story is for

L&D Business Services Model

Key Partners

Product Partners
1) Skillsoft
2) Oracle - PeopleSoft
3) Moody's Financial Analysis
4) Harvard Manage Mentor
5) Webex
6) Taleo (Capture recruitment Info)
7) Cognos for BI Reporting

External material/course providers
1) CSPS - Canadian School of the Public Service for language training (PLF2, Campus Direct)
2) RMA Ementor (Assists Certification)
3) Books 24x7
4) Schools of Business (Columbia, Queens...etc)

Service Providers - Translation
Caterers

Key Resources

NOTE - Requires a single group (L&D) to provide oversight and guidance for Learning services at EDC
1) Performance Consultants
2) Contributors
3) External Trainers
4) Administrators
5) Librarian
6) Team Lead
7) Business Partners (Key liason)
8) Translator
9) Marketing (Branding, templates)
10) Communication (promoting the courses)
11) Enterprise Architect - (Wayne Blesky)
12) Governance | web apps - (Judy Dudley)
13) (TO-BE) Facilitator of Corporate knowledge Exchange/Transfer
14) (TO-BE) Recruiter
15) (TO-BE) SME Mentor | Career Consultant
NOTE - Important that roles and responsibilities are clearly defined.

Knowledge Services

TRAINING in ENGLISH AND FRENCH - (EDC shall be become a trusted partner for both external and internal learners)
1) Training Delivery (requires Just-in-Time training)
   - Instructional Design
   - Analysis
   - Development
   - Delivery – Asynch and/or Synch
   - Evaluation
       - Performance Measurement and support
       - KirkPatrick Model
       - Pre-Qualification (Before they take a course) E.g. Is it mandatory? Where and when is it being offered? What is the   value to the learner? Is it cost effective?

2) Skill testing - Need more testing knowledge acquired. Role specific that are tied to their objectives.
3) (HPI) Human Performance Improvement Advice - Continuous Improvement
   - Team building
   - Consulting
   - Facilitation – 1 on 1 training programs
   - Coaching - Need more Job specific training delivered by SME
   - TTT - Train the Trainer (Coach the Trainer)
   - (TO-BE) Build Customer Centric Leadership - How do you measure behaviors? EDC does not build training around competency. How do you measure functional and emotional fulfillment?

4) Quality Control
   - Partner with COE – 360 review with SME and get sign off
5) Content Management - All content should be consistent and linked to roles
   - Customize course Modules – Assemble and modify existing courses to meet client requests
6) Subject Areas
   - Product Management/Leadership Training and Dev.
   - Technology
   - Professional Development
   - Personal Development
   - Language Training - (e.g. PLF2, Grammaire on Ligne)
   - Customer Centricity
   - MBA Training - What is the criteria and ROI? (Not Clear)
7) (TO-BE) Recruitment testing and Orientation - VM, HR policies, standards
8) (TO-BE) Business intelligence and reporting
9) (TO-BE) Provide standard course design services to EDC groups
10) (TO-BE) Learning Map for for specific Job Roles. This provides a workflow and helps users identify courses that they will need to move forward in their careers at EDC.
11) (TO-BE) Adaptive Training designed specifically to the job role(s) - Job roles need to be defined. Requires a structured blended learning approach (as opposed to an unstructured blended learning approach today)
12) Floating Classes - Offer drop in times to speak to the instructor. More of a university approach and adaptive to the learner needs

INFORMATION
1) Translation
2) Proof Reading
3) InfoCentre's Published Business Information
4) Access to Frequently Asked Questions (FAQs)

Relationships

1) Livewire (Intranet) - Learner Community
2) Meetings - e.g. with Project teams
3) Business partners (higher level groups)
4) Surveys
5) Email - distribution list (Different groups maintain their own lists)
6) Phone calls
7) (TO-BE) Auto-notification by role - Course marketing/promotion B/F annual planning RSS feeds, Subscription based on roles. Learners can sign up for wait lists for courses that will be offered in the future. Managers are copied on the request and RSS feed. Use Livewire more effectively
8) (TO-BE) Public feedback mechanism – E.g. blog, courses are publicly rated
9) Focus group (with relationship manager) requests.
10) (TO-BE) Specific Learning Map based on Role and experience
11) (TO-BE) Communication of the corporate goals and how training initiatives map to these goals
12) Follow up on new course offering based on the course that was taken
13) Use external media for external learners

Clients (Learners)

1) EDC Employees (Approx. yearly budget $3000 per learner)- New learners, Existing and "superusers"
   - HQ
   - Regions
   - International

2) External Clients
   - DFAIT
   - Bank of Canada
   - (TO-BE) EDC Customers
   - (TO-BE) Other Agencies
   - (TO-BE) Potential Partners
       - Brokers
       - Bankers
       - External customers |Exporters

Req. - To capture a Learner's profile and what training they have taken, what training they would like to take (e.g. MBA, CMA, RMA...etc)

Key Processes

1) Course Management
2) Instructor Management
3) Learner Management
4) Course creation - Identify ownership and key stakeholders. Identify needs. Make vs. buy decision - What is the criteria?
5) Course Delivery - Need to improve consistency
6) Evaluation
7) Ad hoc Reporting on: Success | Attendance | Quizzes taken throughout the course | Feedback on Instructor |Overall Course Assessment | Roll-up of comments from the course | Analysis of all the course Transactions | Measurement to determine if the course met the learning objectives, Return on value for the training that learner's have received (360 feedback from their team leads on whether there training was worth it) | Progress reports on value of the content
8) Competency Management (As part of HR Analytics)
9) Consolidate reports in a Dashboard for different roles
10) Report on the actual costs of the course to determine how much EDC is paying for each course.| ROI - What is the criteria to determine training budgets? Is it currently realistic (since many of the costs are hidden)?
11) Chargeback Process - What is the criteria to absorb vs. chargeback?
12) Tracking Education Assistance funds for external training (50% reimbursement) - What is the criteria? Where is this captured in the learner profile? - Talent Management
13) Marketing courses and programs - e.g. Before annual planning

Distribution Channels

1) Learner Portal - Livewire - Learning Hub, COE Web Portals
2) Asynchronous courses - (Skillsoft, OLT)
3) Evaluations and Assessments - (Thinkpass, Zoomerang - Not working for the regions-cumbersome, Survey Monkey)
4) Instructor Led Training (ILT)
5) Face-To-Face Workshops
6) Video Conferencing - (Webex)
7) Video Conferencing - (Webex)
8) Tracker - remote control and sharing of desktops
NOTE - This service can be expanded for language training
9) Asynchronous Video | Vignettes - (built using Adobe Presenter or captivate)
10) (TO-BE) Learning Content Management System (LCMS) - (Sharepoint)
11) (TO-BE) Learning Management System -
12) (TO-BE) Central location for Social Networking to build corporate Intelligence- Wiki (virtual Huddle), Blog, Online Forums, MS Communicator
13) (TO-BE) Social Knowledge Management and Library automation - (InMagic Presto)
14) (TO-BE) Ebooks
15) AgilePoint - Workflow Process Management tool

Cost Elements

Accounts Payable:
1) Resource Costs
2) Professional Fees
3) IT/Training Costs
4) Material Costs (Inventory tracking)
5) Venue
6) Catering
7) AV/Equip
8) Travel - Charge back for Services

Cost Recovery

Accounts Receivable: PAIN POINT - EDC is geared towards Payables instead of Receivables
1) Charge back for Training
   - When paying for learning events, L&D shall track the costs to be charged based on attendance.
   - Recovering costs for external providers
   - (TO-BE) Shall track real costs versus infrastructure costs
2) Reverse commitment - Money owed to L&D. Require a Memorandum of Understanding (MOU) with DEFAIT. Target is to have the expense account at zero by the end of the year (and NOT carry forward)

Cost may be recovered from:
   - Internal
   - External (Bank of Canada, DFAIT - Spin Selling course

L&D Services Catalogue

Services	Elements	Page
1.0 Performance Improvement Solution Development	1.1 Performance Improvement Solution Planning 1.2 Solution design and development	4
2.0 Learning Delivery Management	2.1 Training Delivery	7
3.0 Professional Services	3.1 Coaching 3.2 Training and Development Consultation 3.3 Facilitation 3.4 Team Development 3.5 Official Languages Coaching and Support	9

What went in the LMS RFP?

1 = Very Low	**Buy a Capability $1**	
2 = Low	5 vs. 5	**RFP**
3 = Medium	4 vs. 4	5 – Very High
4 = High	3 vs. 3	4 – High
5 = Very High	2 vs. 2	3 – Medium
	1	

Only the stuff that had real business value!

Example Rated Criteria
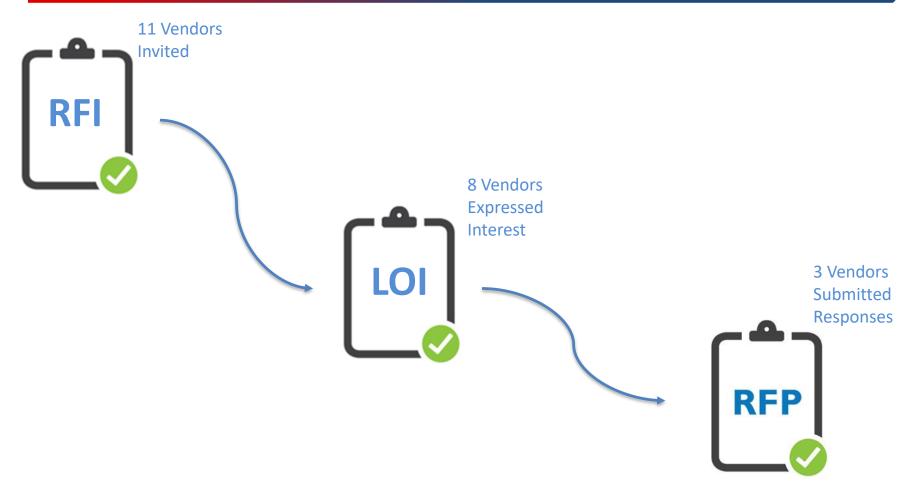
Please use the following legend to indicate your Product's Ceiling Score with the requirement:

      1 = Out-of-the-box

      2 = Standard tailoring (i.e., no code re-write or programming)

      3 = Configuration with a Partner

      4 = Customization required

      5 = Future release

      6 = Not available

HL Procurement Process

RFI

11 Vendors Invited

LOI

8 Vendors Expressed Interest

RFP

3 Vendors Submitted Responses

A 10-page RFP

RFP Evaluation Workflow
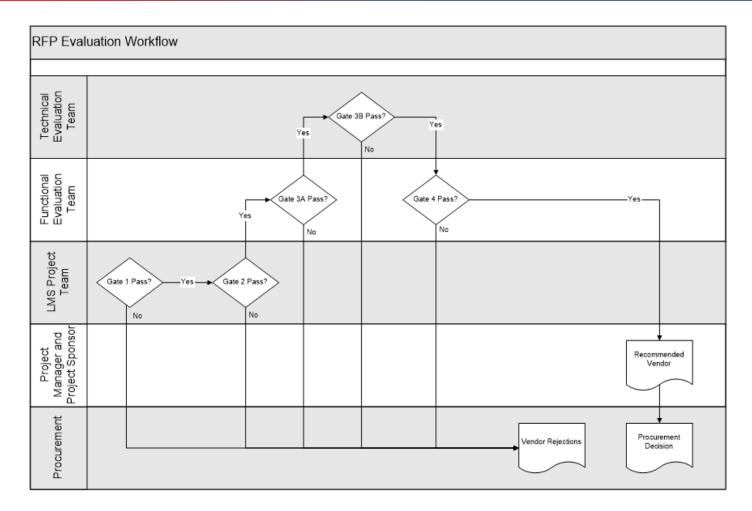
Evaluation Process

Day 1: All team members validated vendor self-ratings

Day 2: All-team review session to gain team consensus on vendor self-ratings. Two of three Vendors pass

Day 3: Board-room Demo – Vendor #1 and #2 switch places

Day 4-5: Paper work….

We also considered whether vendor could work in an agile way

Stop right there!
Before you go any further….

Will you meet our IT "standards"?
Will you meet our architecture?

2 month delay….

What we discovered…

- L&D Business Unit – new higher purpose
  - New services
  - New engagement model

- Processes
  - All existing business processes had to be re-designed
  - New processes had to be created e.g. Designing, Developing, Deploying, and Managing on-line Learning Content

- Org structure
  - New higher purpose and new processes meant a new org structure

- The LMS wasn't the only tool needed
  - Additional procurements necessary (content design and development, 3rd party course content, etc.)
  - Re-use of existing tools (Content Management)

- It's never just about IT an it's also never just about Procurement

How did we do?

- Only 2.5% of the original LMS budget was needed
  - We paid $25K and used the remainder for the newly identified work
- The LMS wasn't the only procurement needed
- More meaningful and relevant business service definitions for the L&D group that connected the WHY and WHO with the WHAT, HOW, WHERE and WHEN
- Easier for teams to think in the big picture while we focused in the small

We kept within the original overall budget and time constraints...

Story crafting is a collaborative game

Finding our WHY is a process of collaboration...

*Knowing our WHY
is necessary for co-creating and delivering BUSINESS VALUE*

("Procure and Implement a..." isn't a WHY!)

How hard is it?

- Like SCRUM, easy to understand, hard to get the hang of it….

- Lots of differing definitions…
  - Value
  - Business Value
  - Outcomes
  - Benefits
  - Theory of Change
  - Logic Models
  - ….

- You have to experience it….

If you'd like some help
to craft your story...

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