

# Individual Project

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## **Problem Statement and Goal**

In a highly changing world industry, Deltek solutions are designed to address the unique and diverse business needs and regulatory requirements of organizations in industries including:

- Aerospace and Defense
- Architecture and Engineering
- Government Agency
- Government Contractor
- IT Consulting
- Project Manufacturing
- Professional Services
- Nonprofit

Since 2001, Deltek solutions has been on the rise in providing software for these types of companies.

The system for recruiting and hiring highly qualified individuals for positions in the company has always been a challenge. Deltek has been traditional in its approach to maturing people to advancing positions. The design for Deltek employees has been the following:

- New hire is trained on products Deltek Advantage (computer-based) and Deltek Vision (web-based). The employee works in a type of call center where they learn the ins and outs of Deltek software. In addition, they deal

with live customer issues and questions that teach them how that customer is using the software.

- After 2 years, employee is promoted to become a QA analyst, writer, researcher, or team leader for Deltek. By this point, the employee knows much about the software and has become familiar with the industry it serves. The promoted position will strengthen the employee's knowledge of the different ways that the product is used.
- After 1 year, the employee may choose to remain where they are with the company or advance up to becoming a consultant or trainer of the product. This advancement means that they are highly knowledgeable of the product, understand the diverse industry it serves, and ready to make direct interaction with these clients. They travel to locations to provide training and consulting to Deltek clients.

This system worked great for 20 years when Deltek was smaller, the job market was less competitive, and software upgrades were less frequent. However, since the turn of the century, several dramatic changes have taken place in the job market. Many new companies have come out offering the same type of product, employees are switching to jobs, other employees are desiring quicker promotions, new clients are purchasing Deltek products and the software is continually being upgraded to accommodate each client it serves.

Now, Deltek has less time to train new hires for advancement positions. Some new hires are coming to Deltek with software knowledge, but not much consulting and

training skills. While other new hires are coming to Deltek as consultants and trainers from other companies. These people are more than prepared to present directly to the clients, but they haven't learned the product well enough.

The goal is to provide a training plan that will allow employees to learn the product and train employees on how to become consultants and trainers at a much quicker speed than the traditional method.

### **Task Analysis**

As Ivor Davies (1981), "Task analysis is nothing more than a detailed inquiry into the actions that need to be taken in the performance of a specific task or job." (p. 9)

The following questions will be asked to managers and trainers:

1. What is the turn over ratio of employees?
2. How many new clients are being created each month?
3. How often are new hires trained on the Deltek products?
4. What areas of Deltek products need more training?
5. How much time is spent is spent doing classroom training? On site training?

Using a survey and observation sessions will be sufficient to answer these questions.

Other questions can be asked directly to the employees following different training sessions.

1. How long have you been with the company?
2. What is current position at Deltek?
3. How often do you receive training on Deltek products in the classroom?

4. How often do you receive training on Deltek products on site?
5. Rating from 1 to 10, tell us how effective the training you received was for providing new and important information?
6. How comfortable do you feel in advancement to consultant or trainer?

### **Learner Analysis**

After collecting data from the previous surveys, another survey will be given that asks more personal information about the employee. The goal of this survey is to acquire information about the employee in the following areas: entry behavior, prior knowledge, attitude towards content, learner motivation, educational abilities, learning preference, attitude toward training organization, and group characteristics.

The following are questions that answer each of these areas:

1. What skills qualified you being hired at Deltek?
2. Name of some things you knew previously about Deltek software (or competitor software) before being hired at Deltek?
3. Rating from 1 to 10, how much do you like the Deltek product that you service?
4. Rating from 1 to 10, how much do you enjoy learning about the Deltek product?
5. What was the highest level of education completed? What was your major? GPA?
6. Which do you prefer more, classroom training or on site training?
7. Do you feel training of Deltek products is given: too frequently? Not enough? Just the right amount?

8. Do you like the way the trainers have taught you the Deltek product? Write down some things that were taught well/poorly.
9. Do you like being trained in your group? Tell why or why not.

## **Findings**

From the results of the task and learner survey, there are many areas to improve, so that employees are trained quicker and better than before. Some of these are:

- Employees need more frequent training.
- Employees need a database for FAQ's and troubleshooting steps.
- Employees need more in person involvement with clientele.
- Employees need more specific training on one area in Deltek Vision called Project Planning.

From this list, I was able to make task objectives that suit the company and are reachable.

## **Objectives**

1. New hires will have training meetings for once a week.
  - These training meetings are for FAQ's from the previous week.
  - Employees are given time each day to enter the resolutions of these FAQ's in company database.
2. Employees spend one hour each day researching the industry.
  - Research is focused on new clientele to the company.
  - Research is focused on new versions and upgrades and how the design supports this new clientele.

3. Employees with company for 6 months start to travel once by quarter to clientele sites to learn how training and consulting work.

- Employees travel with consultants to clientele locations; they help the consultant in presenting and observe the effective training of the product.

In order to monitor progression in these areas, employees will be required to fill out an on-line summary of items that they learned during training, research and consultant visit.

### **Test Strategy and Plan**

In these three objectives, the employees are receiving attention in the three areas of importance: Product, Industry, and Consulting. From the online report given by each employee, data will be collected to see if these strategies are effective.

### **Media Selection**

#### ***Product***

With in house training, employees will use workstation computers, Deltek software, LCD projectors, and smart board will be used to train.

#### ***Industry***

With research, employees will use office computers, network database, Deltek software, the World Wide Web, and telephones.

#### ***Consulting***

In consulting, employees will use laptops, conference phones, and equipment provided by the client.

## **Instructional Strategy**

### ***Product***

The training of Deltek products will take place in one of three training classrooms that are located at Deltek. These sites are set up with the latest version of Deltek Vision and the company FAQ database. In order, to have some employees on the phones with customers at all times. 3-5 employees will be trained at a time. Also, training sessions will take place during on non-peak hours of the workday. Morning is preferable.

The training will be interactive and hands-on. Each employee will be at his/her own workstation. Instructor will have an LCD projector to demonstrate to the entire class at once.

### ***Industry***

Employees will spend one hour of each day researching new clientele. In the beginning, old clientele will need to be researched until all customers have been looked at. This way, the employee can determine what areas of the software the client is using. For example, accounting departments tend to use payroll options more, while engineering departments tend to use project planning.

The hour of research will be consistent each day. Also, employees will insert into a personal database what they spent time researching so that they may revert back to that information in the future.

### ***Consulting***

Employees who have been with the company for 6 months will attend consultant meetings with a consultant once every quarter (four months). This prepares the employee

to become a consultant after the 2 years within the company. However, if there is a high turnover for consultants at a certain time, these trainees will have at least some experience to take over the positions.

## **Project Schedule**

The project will take four months. In one business quarter, the project will attempt one cycle of existence. If progress is made, it will be seen at the end of this time.

### ***Phase 1 (2 weeks)***

#### Project Planning

- Hold a company wide conference for project plan, in that meeting show goals, methods of implementation, and schedule changes.
- Hand out task analysis and learner analysis surveys.
- Receive findings from the two surveys to find out items within each area that need improvement.
- Plan with instructors the first two training sessions.
- Install web database for FAQ.
- Plan content and hours for client research.
- Make first arrangements for consulting visits.

### ***Phase 2 (4 weeks)***

#### Instructional Development

- Develop Job Aids for Deltek trainers.
- Create compensation for employees who are adding resolutions that are unique and proven to be effective.

- Evaluate progress on research. Randomly view employee personal databases on researched items. Start giving employees clients to research in certain zones (i.e. East Coast, Southwest, etc...)
- Send out first employees to consulting trips.

### ***Phase 3 (2 weeks)***

#### Follow Up & Testing

- Administer standardized tests on Deltek product to check for efficiency.
- Classify clientele into categories arrangement by numbers.
- Give each type of company a client number that is unique and arranged for their type of business.

### ***Phase 4 (1 week)***

#### Revisions

- Make changes in areas of need for product, research, and consulting categories.

### ***Phase 5 (6 weeks)***

#### Implementation

- Carry out project plan with any of its modifications until the week before the end of the quarter.

### ***Phase 6 (1 week)***

- Evaluate all areas of the project plan to determine if objectives were successful and goals were met.

## **Project Budget**

The project will have two payments. The first payment will be given out after the first week of the business quarter schedule. This will equal the amount of 300,000. The second payment is optional upon if the client feels that the project was successful in training employees for advancing positions at a quicker speed. If so, the bonus will be 100,000 whereby, I would continue to work with the company for one more quarter to guide the direction of the project further. If the company does not wish to continue implementing the project, no more hands of money for services will be exchanged.

## **Lesson Plan**

For the sample module and lesson, I will show one of the training sessions with Deltek Vision. This session would most likely take place in the first week, since it is an introductory session of training.

## **Sample Module**

### ***Deltek Vision***

1. Introduction to the interface of program
  - ✓ Dashboard
  - ✓ Projects
  - ✓ Visualization
  
2. Introduction to Project Planning
  - ✓ General tab
  - ✓ Top-down Plan tab
  - ✓ Summary tab

- ✓ Analysis tab
- ✓ Labor tab

## **Lesson on Project Planning**

### ***Introduction***

Make sure the right people are on the right projects at the right time. Automate scheduling, resource allocation, budgeting and forecasting to help project managers and resource planners determine whether proposed fees are accurate, appropriate staff is available and allocated effectively, and projects come in on time and on budget. Timesheet entries and expense reports feed actual costs back into the project plan for an accurate rolling forecast that managers can use to make faster, more informed decisions and ensure projects stay on track.

This training session will introduce you to Deltek Vision Project Planning. By the time you have finished this chapter you will be familiar with the functions of project planning for a project-oriented business.

- Lesson 1: Starting Deltek Vision
- Lesson 2: Starting Project Plan
- Lesson 3: Accessing an account
- Lesson 4: Creating Project Plan
- Lesson 5: Implementing Project Plan
- Lesson 6: Evaluation

## Lesson 1- Starting Deltek Vision

Locate the Deltek Vision icon on your screen.



Click on link to open Deltek Vision

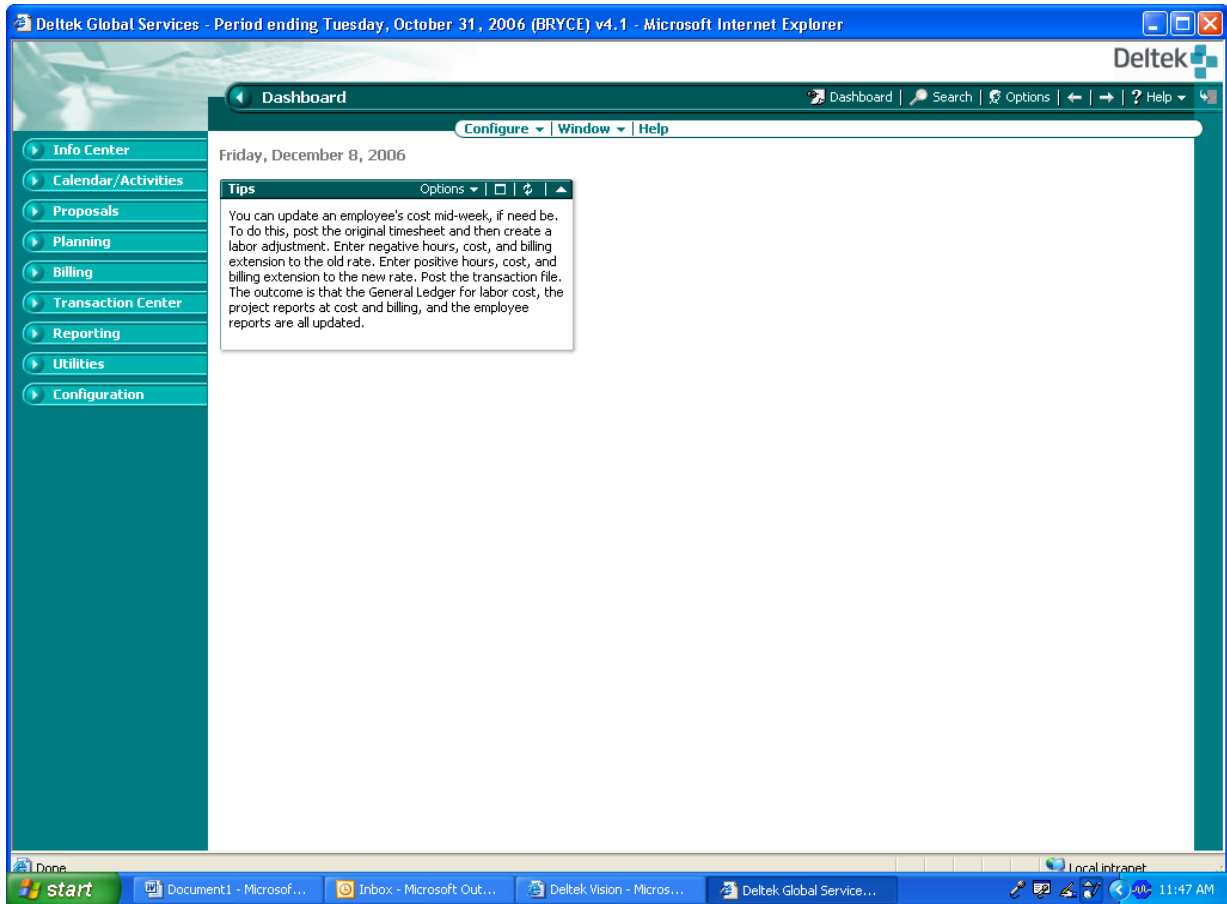


Figure 1

## Lesson 2- Starting Project Plan

When the Dashboard is open, the left will be a column of options



Click on the link and the options will open below.

Select the option 'Projects'

### Lesson 3- Accessing the Account

When the Projects menu is open look to the right side of the interface for the Find Box with the Binoculars to the right.

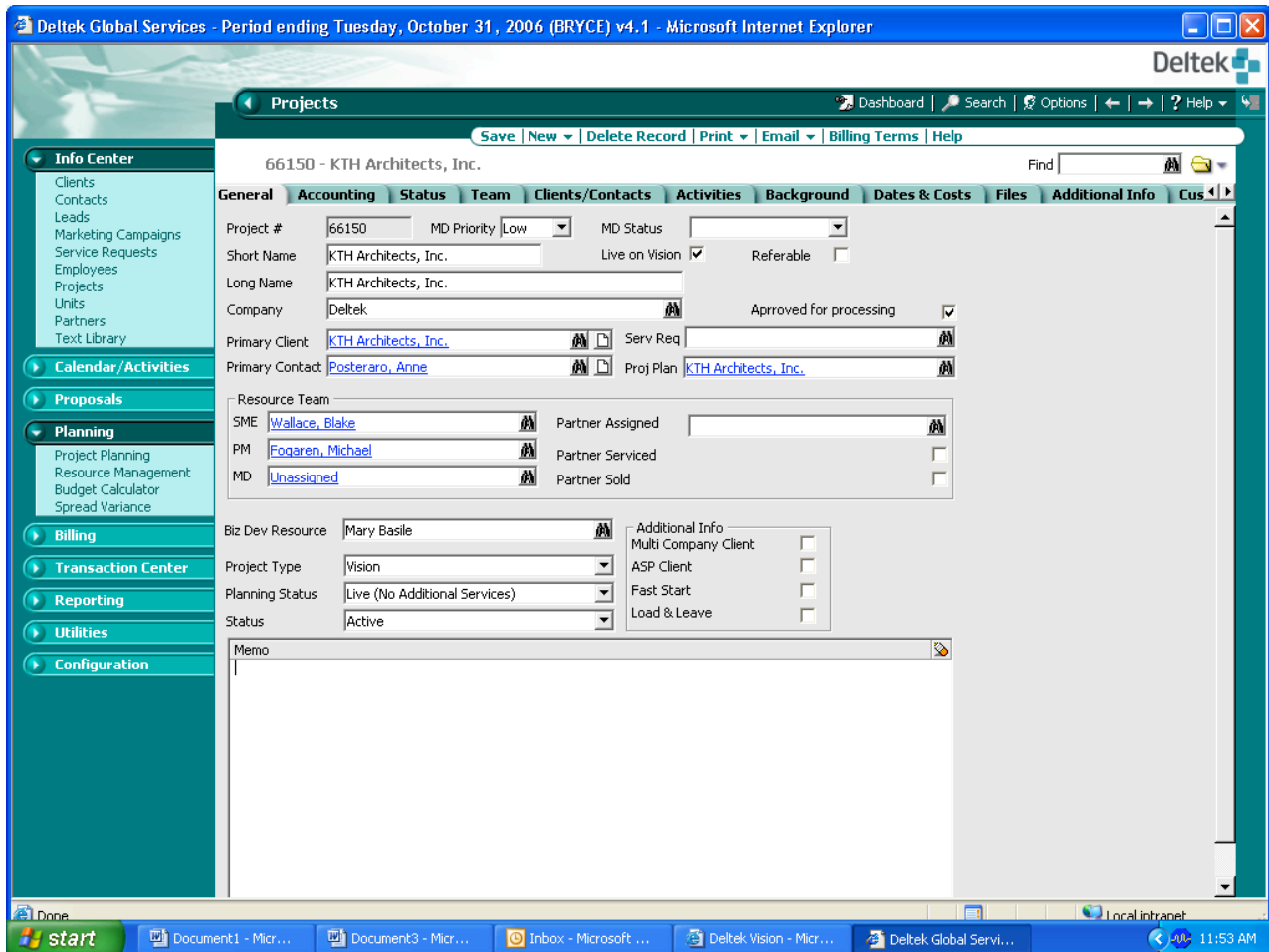


Figure 2

Enter in the Client name or number to access that account.



When the name of the client appears on the top portion of the interface, you may create a new project.

## Lesson 4- Creating Project Plan

When the Project Planning screen is open, insert information appropriate for the project you would like to plan.

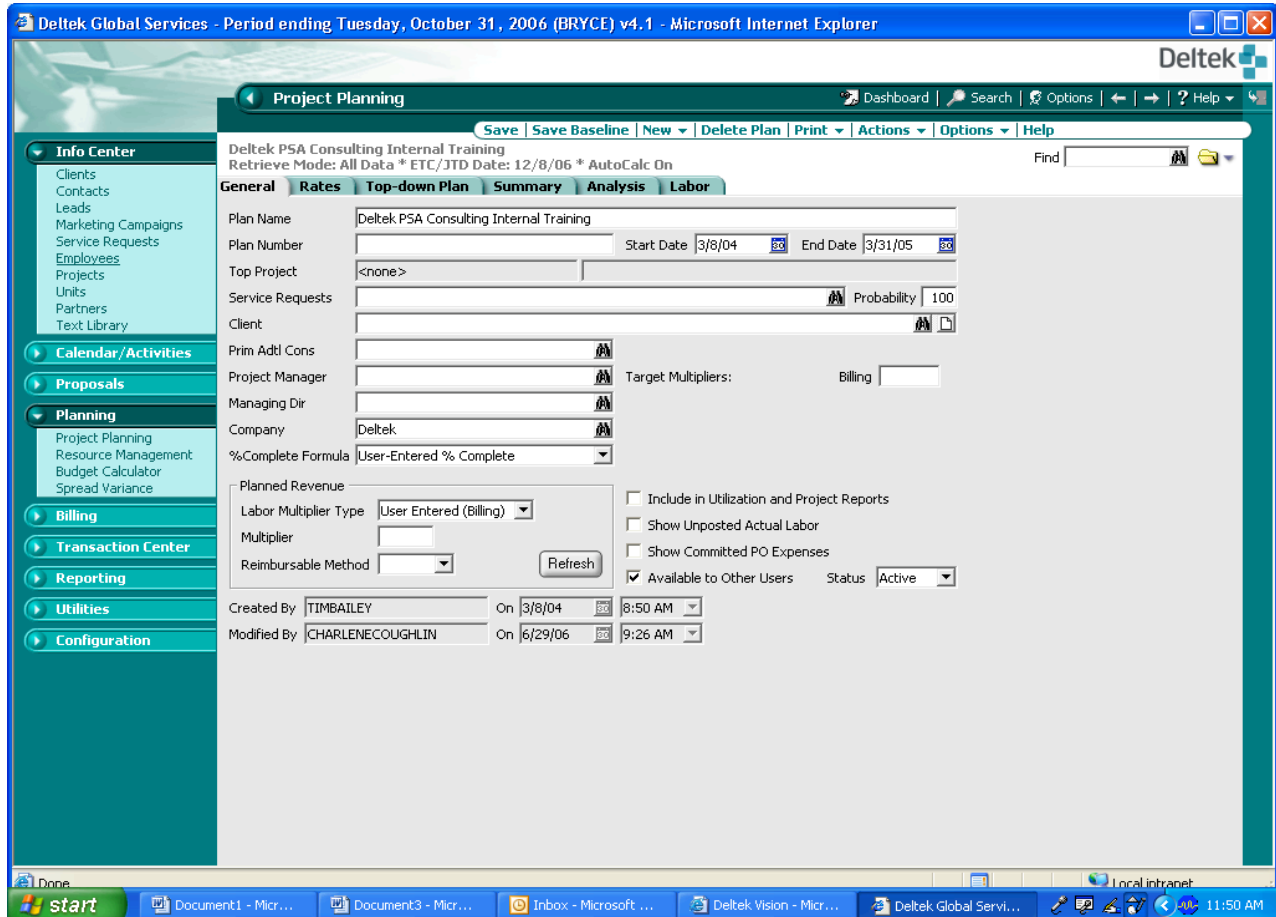


Figure 3

## Lesson 5- Implementing Project Plan

The following features are allowed in this section

- Start by entering information that pertains to the project in the general tab
- Click on the Rates tab to enter budget items.
- Click on the Top-down Plan tab to view and print presentable project plan.
- Click on the Summary tab to view a condensed version of your plan.
- Click on the Analysis tab to insert comparable statistics to other projects.
- Click on the Labor tab to view time and work involved with completing of project

The screenshot displays the 'General' tab of a project plan software interface. The interface features a tabbed menu at the top with options: General, Rates, Top-down Plan, Summary, Analysis, and Labor. The 'General' tab is currently selected. Below the tabs, there are several input fields and controls:

- Plan Name:** A text input field with a search icon.
- Plan Number:** A text input field.
- Start Date:** A date selection field with a calendar icon.
- Top Project:** A dropdown menu showing '<none>'. To its right is a 'Target Multipliers:' label.
- Service Requests:** A text input field.
- Client:** A text input field.
- Prim Adtl Cons:** A text input field with a user icon.
- Project Manager:** A text input field with a user icon.
- Managing Dir:** A text input field with a user icon.
- Company:** A text input field with a user icon.
- %Complete Formula:** A dropdown menu set to 'User-Entered % Complete'.
- Planned Revenue:** A section containing:
  - Labor Multiplier Type:** A dropdown menu set to 'User Entered (Billing)'.
  - Multiplier:** A text input field.
  - Reimbursable Method:** A dropdown menu.
  - Refresh:** A button.
- Checkboxes:** A list of checkboxes on the right side:
  - Include in Utilization and P
  - Show Unposted Actual Lab
  - Show Committed PO Expe
  - Available to Other Users
- Created By:** A text input field with a user icon.
- On:** A date selection field.
- Modified By:** A text input field with a user icon.
- On:** A date selection field.

Figure 4

## **Lesson 6- Evaluation**

### **Pre-test Assessment**

Once each employee has entered in a project plan, have him or her close out of Deltek Vision. Using notes, allow each employee to enter into Deltek Vision and create a new project under the same client name.

Allow the employee 30 minutes to study in the manuals about Deltek Vision Project Planning. The manual explains what each feature does within that section of Deltek Vision. Allow each employee to navigate through the program as they learning the functions.

### **Test**

The test will be administered after the 30 minutes is up. Have each student close out of the program completely and turn off the monitor to his or her computer. The test will consist of answering the following questions.

1. What information is entered in project planning under the General tab?
2. What information is entered in project planning under the Rates tab?
3. What information is entered in project planning under the Top-down Plan tab?
4. What information is entered in project planning under the Summary tab?
5. What information is entered in project planning under the Analysis tab?
6. What information is entered in project planning under the Labor tab?

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