



# MANAGING INSTRUCTIONAL DESIGN PROJECTS —JOB AID

This job aid provides instructional designers with tips and reminders appropriate for specific aspects of the project management process. The information was compiled from interviews with current accomplished performers in the field.

## WHEN STARTING A NEW PROJECT

“The biggest mistake I see people make is trying to treat a new project like the last one. No two projects are the same and overlooking the uniqueness will mean you are missing the risks.”

—Gary Rauchfuss, Associate Director/Curriculum Manager, Homeland Security Acquisition Institute (HSAI)

“Spend a lot of time identifying risks and then build the schedule to accommodate the risks. A schedule that does not account for risks is doomed to fail.”

—Gary Rauchfuss

- **Establish explicit and transparent communication with stakeholders from the start**
  - Provide clear documentation, examples, and templates
  - Manage stakeholder expectations and negotiate realistic deliverables
  - Discuss learners and establish attainable objectives
- **Develop your initial schedule as soon as possible**
  - Start with the client’s deadline and work backwards
  - Include milestone dates, meetings, and check-ins
- **Plan for setbacks**
  - Anticipate all possible obstacles and failures
  - Create a recovery plan

## DURING THE PROJECT

“To make sure that things stay on track, I communicate regularly. I take a look at the client’s perspective to try and eliminate issues early on.”

—Glenn Pillsbury, Instructional Designer, CSUS

“Informal user testing keeps you honest. Do a lot of testing upfront. Get it out there, observe users working on it. Users will give you great ideas for solving problems.”

—Pat Sinnott, Digital Learning Manager, National Geographic Learning

- **Maintain regular communication**
- **Incorporate user testing early and often**
- **Prioritize tasks and make changes when things are off track**
  - Reassign tasks to different team members
  - Redirect client requests that are not feasible to more reasonable options.
- **Remember that less is often more**
  - Focus on function and outcome
  - Avoid overcomplicating your process and your deliverables
  - Seek concise and efficient solutions



## WHEN DEALING WITH PERSONNEL CONFLICTS

“It’s important to keep in mind I’m not a people manager...I’m a project manager, so I keep communication with the IDs very project-focused.”

—Rebecca Green, Senior Instructional Designer, Pacific Gas & Electric

“My best advice for dealing with conflict is to try and understand what people want from the project; what motivates them. For example, do they want recognition? To get the project done as quickly as possible? Or maybe a focus on personal priorities?”

—Laura Otero, Instructional Technologist, Hartnell Community College

- **Have regular check-ins with all members of your team**
- **Be clear, explicit, and project focused when communicating**
- **Figure out what motivates the people you are working with**
- **Make the most of your time with subject matter experts (SMEs)**
  - Provide as much context as possible
  - Help the SME see from the perspective of your learners

## GENERAL ADVICE

“My college is already based on Google Suite, so I take full advantage of the various tools there. I schedule out my projects using Google Calendar and I use a lot of shared folders, docs, spreadsheets, slides, and more to collaborate with my colleagues.”

—Laura Otero

“The sticky notes are really my day to day organization. If you’re managing multiple projects, you need something simple and very visible.”

—Rebecca Green

- **Keep it simple**
  - Checklists and spreadsheets
  - Sticky Notes
  - OneNote
- **Use the tools that are readily available at your organization**
  - Microsoft Team
  - Google Suite
  - Trello
  - Jira
- **Use a systematic process so you and your clients know what to expect**
  - Successive Approximation Model (SAM)
  - Processes already in place

Designer: Maribel Duran, Developers: Mark Angel & Lisa Lark, Editor: Janine Boylan, Project Manager: Jenny Jo Conner

### Accomplished Performers:

Rebecca Green, Senior Instructional Designer, Pacific Gas & Electric  
Laura Otero, Instructional Technologist, Hartnell Community College  
Glenn Pillsbury, Instructional Designer, California State University, Stanislaus  
Gary Rauschfuss, Associate Director/Curriculum Manager, Homeland Security Acquisition Institute (HSAI)  
Pat Sinnott, Digital Learning Manager, National Geographic Learning

