# Case Study Company: Bee Naturals

Bee Naturals (BN) is a health and beauty company that uses raw honey and honeycomb as key ingredients in all their products. BN got its start in 2018 and has been building its brand successfully each quarter.

Last year’s circumstances forced BN to move face-to-face (F2F) training to online/virtual (VILT). Because of the demand and stress, it has placed on the L&D team, the **Training Manager recently developed two tools to help evaluate and estimate project requests (seen on page 2).**

## Points to Consider As You Review This Case

* **Audits –** What hasn’t been assessed within the department? Are the Audits current and up to date?
* **Assumptions** – What is the level of confidence in an Assumption? Does the Assumption require further investigation to validate it?
* **Baselines** – Does the project use current Baseline hours? Does a Baseline need to be created?
* **Interpretation** – Does everyone Interpret the evaluative tool and its criteria the same? Does quantifying projects always make it accurate? Could qualitative data (such as anecdotal information with a common theme) be useful to inform a project estimate?
* **Weight** – Is it really Weighing all the criteria? How will the Weights be applied? (e.g., per project phases or to total hours estimated, etc?)

# BN’s Learning and Development Department Profile

BN runs a tight L&D hive:

* 1 Training Manager – Been with BN since the start
* 2 Sr. Instructional Designers – 1 since 2018 and 1 just hired last week
* 3 Jr. Instructional Designer/Developers – 1 since 2019 and 2 since 2020
* 1 LMS Administrator/Data Analytics – since 2019

## Creating eLearning at BN standardly Includes

* New content being added to current topics
* 4 or more engagements within the entire course
* Clients that have been onboarded and worked on a minimum of 2 projects
* 1 Sr. ID for project management, quality control, additional help
* 1 Jr. ID with a minimum of 2 years of ID experience and 6 projects completed
* Templates to use in all the authoring tools |LMS course structures created
* Short timelines (less than 6 weeks)
* Project hours for BN eLearning average about 244 hours through the use of these key project roles:
  + **LMS Administrator** – 10 hours
  + **SME** – 12 hours
  + **Sr. ID** – 30 hours
  + **Jr. ID** – 192 hours

# Parametric Measures

The following two tables outline the weights BN has created for project work at this time.

## Expertise of Staff

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Evaluative Criteria** | **.75** | **.50** | **.25** | **0** | **Variable** |
| **Experience Level in ID Skills** | No formal education or certification | Has formal education/certification, but no experience | Has formal education/certification, and has some experience (1-2 years) | Has formal education/certification, and has some experience (3+ years) | New methods or techniques (e.g. Storytelling or Microlearning) |
| **Experience Level in BN Authoring Tools** | First time using tools | Used each tool a minimum of 2 times | Used each tool 3 to 5 times | Used each tool 6 or more times | Custom coding abilities |
| **Experience at BN** | 6 or fewer project | 7 to 14 projects |  | 15+ projects | Project is new to all of the L&D team and client |

## Overarching Project Variables That Can Alter Overall Project Scope

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Evaluative Criteria** | **.75** | **.50** | **.25** | **0** | **Variable** |
| **Initiative Type** | New concept/skills or method/process  New topic and new tech | New topic | New content, old topic | To Be Determined | Sustainment and/or Maintenance |
| **Engagement Level for Learner** | Fully Immersive | Partially Immersive (5 to 8 engagements) | Lightly Immersive (2 to 4 engagements) | No engagements (page turner) | Storytelling  Case Scenarios  Gamification/Gamified Elements |
| **Duration of Project** (based on business weeks) | Less than 4 weeks | 5 to 9 weeks | 10 to 15 weeks | 16 to 20 weeks | Multi-phased projects |
| **Client** | New, no onboarding  Returning, creates high risk | New, onboarded | Returning, creates moderate risk | Returning, no risk | Combinations of new and returning  Combinations of onboarded vs not |

# Project Overview: Conversion of F2F Content to Online Self-Paced

BN needs to **convert 15 courses over 7 curriculums, that were already converted from F2F to VILT, to online, self-paced**. BN has never done this type of project before **but think** it will be nothing more than taking the **trainers PowerPoint slide decks and converting them using one of their common authoring tools**. The request is to have:

* **The task done in 12 weeks**,
* **Minimize engagements:**
  + **Only knowledge checks inside each lesson of a course**
  + **One mastery assessment per course**
  + **Final assessment per curriculum certification**

The Training Manager appoints 1 Sr. ID and 2 Jr. IDs to the task and weights the following criteria based on the initial conversation with the COO (Chief Operating Officer).

* **Initiative Type**: Variable
* **Engagement Level for Learner:** .25
* **Duration of Project**: .25
* **Client:** .75

## It’s your Turn

Use the table on the next page to play out different ways to estimate the project. The roles and information inputted into the table coincide with the Bee Naturals project that was provided above. The LMS Admin role and 1 Jr. ID role were completed to help remind you of how to multiply using the weight applied. You can remove these if you like and apply a different weight.

Note the following:

* There are additional rows as you may want to add additional roles or global variables. This might help you in learning how to define and create weights that are meaningful to you and your organization.
* This table addresses project work at a high level to give an initial estimation. Tables can be granular and weight specific tasks in a project, such as writing objectives and assessments, storyboarding, creating custom scripts. Again, the variables, their definitions, and their weights would need to be created.
* Your weights do not have to be on a 0 to .75 scale. Your organization may use other multipliers like 0 – 4 or .25 to 2 for example.
* You could take this table and place it into MS-Excel and create formulas on cells to help ensure accurate calculations.

\*REMEMBER: PARAMETRIC MODELING NEEDS TO WORK WITH YOUR ORGANIZATION’S NEEDS/VARIABLES. THIS IS AN EXAMPLE.

**USE IT TO HELP YOU DETERMINE YOUR OWN**!\*

# High Level Estimation Table for Project Work

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role**  **(High Level LOE)** | | **# of Hours** | **Expertise** | | | | **Learning Environment**  **(0 to .75)** | **Engagement**  **Level**  **(0 to .75)** | **Estimated LOE** |
| **Instructional Design**  **(0 to .75)** | **Content Matter**  **(0 to .75)** | **Authoring Tools**  **(0 to .75)** | |
| LMS Admin | | 10 | 0 | 0 | 0 | | .50  (10 x.50 = 5) | 0 | 15  (10 + 5 = 15) |
| SME | | 12 |  |  |  | |  |  |  |
| Sr. ID | | 30 |  |  |  | |  |  |  |
| Jr. ID (#1) | | 192 |  |  |  | |  |  |  |
| Jr. ID (#2) | | 192 | .25  (192 x .25 = 48) | 0 | 0 | | .25  (192 x .25 = 48) | .25  (192 x .25 = 48) | 336  (192 + (48\*3) = 336) |
|  | |  |  |  |  | |  |  |  |
|  | |  |  |  |  | |  |  |  |
|  | |  |  |  |  | |  |  |  |
| **Subtotal # of Hours** | | | | | | | | | **351** |
|  | | | | | | | | | |
| **Other Project Variables** | | | | | | | | | |
| **Variable** | **Description/Explanation** | | | | | **Weight Applied** | | | **Estimated of LOE** |
|  |  | | | | |  | | |  |
| New client | First training project with new client. Client does not have experience in working on a training project. | | | | | .75  (Subtotal # X Weight) | | |  |
| **Add Additional Global** | **Define and/or explain the factor and its** | | | | | **Assign a weight to that** | | |  |
| **Project Variables into** | **global impact on the project here.** | | | | | **variable and use it** | | |  |
| **these rows.** |  | | | | | **to multiply the subtotal** | | |  |
|  |  | | | | | **# of hours from above.** | | |  |
|  |  | | | | |  | | |  |
| **New Total** | | | | | | | | |  |