

Scope of Work Statement: Project North Star

Prepared by: Triad Consulting Group

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Work Sample

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Executive Summary

The enclosed proposal outlines an in-depth, multi-tier employee training initiative, with the objective of reinforcing Techno Digital Corporation’s (TDC) competitive edge in the digital music industry during a phase of rapid growth.

With 3 offices across London, Toronto, and Calgary, TDC has grown to a workforce of 2,000 employees. This flux has resulted in a need to equip employees with advanced skills and knowledge that strategically aligns with TDC’s mission and values, and champions teamwork, collaboration, creativity, adaptability, customer service excellence, and technical savviness.

Once complete, employees will have a deeper understanding of TDC’s future-facing direction, and how to apply said direction to their daily roles and responsibilities to meet both organizational and customer needs and expectations.

By investing in the people, TDC will position itself for long-term success through high organizational performance and continued growth.

Business Objectives

1. Increase FY2025 shareholder value (+2% YOY) and sales (+8% YOY)
2. Champion TDC’s strategic mission and vision
3. Develop an evergreen, scalable employee training program
4. Improve customer service satisfaction scores

Business Needs & Opportunities

TDC has undergone rapid growth by doubling its sales, increasing stock value, and increasing its FTE count since opening in 2018.

This unique position creates a new need for TDC - to sustain their competitive leadership in the digital music industry, as other organizations strive to catch-up or challenge. To do so, TDC has the opportunity to root its organizational practices into strategic imperatives, invest in employee training & development, and increase organizational performance and value through:

- Organization mission & vision awareness, application, and reinforcement
- Organizational competencies for application to jobs
- Employee skills upgrading/training
- Improved employee teamwork & coordination

Project Description

The proposed training initiative will run from January to September 2025 (9 months) and is structured into 3 tiers, based on the diverse needs of employee roles & responsibilities, to maximize relevancy, retention, and job transfer. Upon completion employees will understand TDC’s strategic direction, and how to apply relevant competencies to their jobs in a relevant and meaningful way.

As mentioned, training modules are structured into 3 tiers based on the diverse skill and knowledge needs for the full organization, vs. management employees and non-management employees. Within the tiers, training content will be developed to reflect high-performance employee behaviours & desired organizational capabilities:

- **Tier 1, Entire Organization:** Understanding TDC’s mission, vision, and strategic goals
- **Tier 2, Management-Level Employees:** Communication, collaboration, creativity, and adaptability
- **Tier 3, Non-Management-Level Employees:** Customer service, and technical expertise

Project Deliverables

This scope of work (SOW) proposal is inclusive of the following key outputs, to be delivered throughout established initiative milestones and deadlines (Saks, 2024):

1. **Assessment:** Training program proposal report
2. **Design:** Aligned training program outline
3. **Develop:** Finalized training program
4. **Deliver:** Tier 1, 2, and 3 training sessions
5. **Evaluation:** Post-mortem report, optimization recommendations, optimized training program
6. **Administration:** AOR contracts and policies, communication and finance channels, policies & processes

Statement of Work

Background

TDC has experienced a period of rapid expansion, doubling its sales and increasing its stock price significantly, since its start in 2018; meaning there has been a major influx of employees since the company began its humble beginnings and is now sitting at 2,000 employees.

The increase of employees indicated to the CEO, Valentina DeCarlo, that there is a need for reinforcement regarding the strategic vision and mission at TDC and the related competencies/expectations of employees. In order to stabilize the culture and competencies of the new/existing employees relating to the strategic vision and mission of the organization, an exhaustive multi-tiered training program was chosen for the employees to take part in.

Triad Consulting Group was hired by TDC to identify desired high-performance competencies, as the content for which the employees need to be versed on by the end of training:

- All employees: understanding both the corporate vision and the strategy/goals of the company
- Management: communication, creativity, adaptability, collaboration
- Non-Management: customer service and technical expertise.

This was chosen as a tactic to ensure strategic cohesion internally, to remain competitive externally in the market.

Technical Description

This training program will take place starting January 1st and will not exceed a nine-month period. This duration of time has a \$400,000 CAD budget to cover the entirety of costs associated with the three-tiered training program, which includes varied information for the whole organization tier, non-management tier, and management tier.

As highlighted above, the scope of the training program focuses on the corporate mission and vision for the organization, and translating into daily operations through communication, collaboration, creativity, adaptability, customer service and technical expertise.

Training will occur in a classroom in each of the respective locations (London, Toronto, Calgary) and will utilize a blend of learning techniques such as:

- In-person lectures, with activities and discussion exercises,
- Online lectures (Zoom) and eLearning training modules

Thus, both paper handouts and computer/internet related resources will be provided to each participant. The training is structured for increments of 500+ people per session, with multiple days of training to cover all three groups.

Limitations and Constraints

Identified limitations and constraints are captured below for consideration:

- **Budget Constraints:** Due to the surplus of employees, training program costs and the multiple tiers of training which are required in this circumstance, the budget is a major limitation and may require additional investments.
- **Timeframe:** Having nine months to complete the training program may seem like a solid amount of time but there are unprecedented occurrences which could deter the training program from staying within the allocated time frame
- **Productivity:** The continuation of work outputs/performance at the current rate cannot continue while most workers are training, which contributes to the time-frame concern mentioned above and has implications for how the company will structure/schedule the training program.
- **Employee Resistance:** Due to the extensiveness of the training program, with employee’s participation of multiple sessions on different topics, there could be some friction when it comes to engagement and participation. If so, this may also be detrimental to job transfer.

WBS

Work Breakdown Structure (Microsoft Create, n.d.)



*AOR = Agency of Record

Program Milestones

Identified Milestone	Date
Proposal Alignment	30-Jan-25
Program Development	25-Jan-25
Program Finalization	10-Mar-25
Corporate Conferral	25-Mar-25
Program Pilot	15-Arp-25
Tier One Training Session Commencement	1-May-25
Tier Two Training Session Commencement	16-May-26
Tier Three Training Session Commencement	1-Jun-25
Post Training Follow-Up	20-Jun-25
Program Competency Measurement	20-Jul-25

WBS Dictionary (Project Management Docs, n.d.)

Level	WBS Code	Element Name	Definition
1	1	Project North Star Training Program	All work to implement a new training program.
2	1.1	Assessment (Complete)	All work to initiate the training program project.
3	1.1.1	Competency & Capability Audit	<ul style="list-style-type: none"> - Evaluating TDC's current organizational capabilities and competencies - Auditing industry and competitor capabilities and competencies
3	1.1.2	Needs & Gap Analysis	<ul style="list-style-type: none"> - Comparing internal and external audits to determine TDC's current gaps, and future-facing needs for high levels of performance and productivity
3	1.1.3	Solution & Projections Development	<ul style="list-style-type: none"> - Proposal development capturing recommended solutions with topline structures, initial budget estimations, and corresponding result projections
3	1.1.4	Deliverable: Final Report	<ul style="list-style-type: none"> - Finalized proposal report for review, feedback, and revisions.
2	1.2	Design	All work for program design planning.
3	1.2.1	Milestone: Proposal Alignment	<ul style="list-style-type: none"> - Final solution recommendations aligned on by all key stakeholders
3	1.2.2	Program Wireframe (Structure) Development	<ul style="list-style-type: none"> - Clarify training purpose - Identify constraints such as budget, timeline, resources, etc. - Identify challenges such as tech limitations, time constraints, language barriers, etc. - Decide on logical sequencing for the material - Allocate time estimates according to material/sessions
3	1.2.3	Evaluation Process & Criteria Development	<ul style="list-style-type: none"> - Establish interactions as form of job transfer and competency measurements, such as <ul style="list-style-type: none"> - Group discussions - Open-ended questions

			<ul style="list-style-type: none"> - Knowledge checks - Quizzes - Assignments - Develop 3M/6M/9M post-program effectiveness and performance KPIs - Develop program feedback structures for future optimizations
3	1.2.4	Deliverable: Aligned Program Wireframe (Structure)	<ul style="list-style-type: none"> - Finalized training program structure
2	1.3	Develop	All work for program development
3	1.3.1	Milestone: Program Content Development	<ul style="list-style-type: none"> - Define learning objectives and transform them into clear, measurable statements to include in the program - Consider language, cultural context and accessibility needs of employees - Develop program learning outlines - Select appropriate learning activities - Arrange an integrated peer-review process for feedback
3	1.3.2	Program Content Draft	<ul style="list-style-type: none"> - Develop all lesson plans, presentation decks and scripts/notes, take-away materials, etc. - Incorporate media and technology such as images, videos, animations, interactive learning, etc. - Consider a preliminary dry run to firm up content before sharing up to Leadership
3	1.3.3	Milestone: Corporate/Expert Conferral & Revisions	<ul style="list-style-type: none"> - Confer with Leadership to ensure objectives and content of training program align with organization strategy and culture - Consider sourcing feedback from external industry experts - Revise program content as needed
3	1.3.4	Deliverable: Final Training Program	<ul style="list-style-type: none"> - Finalized Tier 1, 2, and 3 training programs
2	1.4	Deliver	All work to facilitate the new training program.
3	1.4.1	Milestone: Program Pilot	<ul style="list-style-type: none"> - Arrange pilot audience with key stakeholders and employee representation - Ensure the pilot is conducted in controlled environment - Troubleshoot any live issues or hiccups - Collect program feedback to make final adjustments as needed, including take-away materials.
3	1.4.2	Deliverable: Tier 1 Training Session	<ul style="list-style-type: none"> - Entire Organization - Understanding TDC's mission, vision, and strategic goals - Capture immediate feedback - Share take-away materials and resources
3	1.4.3	Deliverable: Tier 2 Training Session	<ul style="list-style-type: none"> - Management-Level Employees - Communication, collaboration, creativity, and adaptability - Capture immediate feedback

			<ul style="list-style-type: none"> - Share take-away materials and resources
3	1.4.4	Deliverable: Tier 3 Training Session	<ul style="list-style-type: none"> - Non-Management-Level Employees - Customer service, and technical expertise - Capture immediate feedback - Share take-away materials and resources
2	1.5	Evaluation	All work to evaluate & optimize the program.
3	1.5.1	Milestone: Post-Training Follow-Ups & Competency Measuring	<ul style="list-style-type: none"> - Conduct employee competency and job-transfer effectiveness evaluations - Identify gaps that may require additional training or program optimizations
3	1.5.2	Milestone: Program Feedback & Evaluation	<ul style="list-style-type: none"> - Collect program feedback and evaluations - Identify gaps that may require additional training or program optimizations
3	1.5.3	Deliverable: Post-Mortem Report & Optimization Recos	<ul style="list-style-type: none"> - Overview of program objectives, strategies, structures and content - Summary of evaluations and key learnings - Identified successes and opportunities - Optimization recommendations
3	1.5.4	Deliverable: Optimized Training Program	<ul style="list-style-type: none"> - Optimized program for future training needs - Project wrap
2	1.6	Administration	Ongoing administrative duties during the program.
3	1.6.1	Deliverable: AOR Contracts & Policies	<ul style="list-style-type: none"> - Service agreement contracts - Fee and budget approvals
3	1.6.2	Deliverable: Communication Channels, Policies & Processes	<ul style="list-style-type: none"> - Vendor communication structures such as: <ul style="list-style-type: none"> - Key contacts - Escalation processes - Ongoing status reports
3	1.6.3	Deliverable: Finance Channels, Policies & Processes	<ul style="list-style-type: none"> - Vendor finance structures such as: <ul style="list-style-type: none"> - Invoicing and payments - Hard cost & expense management - Monthly reconciliation reports
3	1.6.4	General Administrative Duties	<ul style="list-style-type: none"> - Ongoing as required

Risk Management Plans

#	Identified Risk Events
1	Lack of engagement among employees leading to a lack of measurable change or effectiveness among employees from training.
2	Legal liability; When introducing training programs to such large groups of individuals there is always the risk of legal liability, ensuring compliance with relevant regulations is a crucial and fragile factor for presenting training information in large sums to employees
3	Wasted resources; Training programs require a large budget and timeframe for completion, therefore ensuring the proper implementation and information is utilized is crucial
4	Worker complacency; may be a risk for existing, high achieving employees that feel they are already well-versed on the content in the training program
5	Technical malfunctions or issues/technology risks; due to the use of computers and the need for internet access, unprecedented circumstances related to tech, such as possible internet outage, could result in delays or inconsistencies in training

6	Delayed productivity
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Risk Event	Likelihood: 1-5 (1 = Not Probable, 5 = Being Certain)	Organization & Employee Impact	When
Legal Liability	1	May have detrimental effects on the TDC such as penalty fines, litigation, audits, etc., and may violate employee rights and protections in the workplace.	One must be mindful of legal compliance during the entirety of the project duration; privacy is a priority when the employees are using TDC technology.
Lack of employee engagement	2	May negatively impact training session productivity and effectiveness, which could equate to weak <i>training-to-job</i> transfer and monetary losses. This could also have adverse impact on employees, as poor evidence of transfer could require additional interventions or result in attrition.	During the physical training session and post-training competency measurement/evaluation.
Worker Complacency	3	A lack of employee engagement in the training program from seasoned workers could translate to a less successful training session, as well as negative/ apathetic perceptions and attitudes toward management after training program completion.	During the training program and the following working days.
Technical Issues	3	There could be a delay to the training program completion if portions are inaccessible due to the loss of technological function.	During the training process, there are multiple technological components to the training program.
Wasted Resources	4	Sunk costs that cannot be recovered, loss of corporate funding or revenue, and less effective training program (depending on the resource).	This could be any resource as any period of the training program rolls out, as even meetings that take too long and go over expected time frames are considered waste.
Delayed Productivity		There could be a monetary loss for this risk of delayed productivity as there will minimally be a partial halt to production while the training takes place; production could be completed by replacement or temporary workers which again would incur a cost.	When employees begin their participation.

Communication Management Plan

TDC's communication plan will span the entire duration of the training program design, development, execution, and postmortem activities in order to ensure all relevant parties will have the required information for a successful roll out/updating period. There will be an open and thorough line of communication established early in the project and will be held for the entire duration; including for the remainder of the year for any possible inquiries or additional resources as needed. Due to the nature of the training program content, the majority of the organization will be privy to a variety of information with very few steps being exclusive to one party. This communication plan aligns with the anticipated training program milestones.

Milestone	Target Audience	Dates/Pacing	Channel	Owner
Project Status Report	CEO & Management	Bi-Weekly to Monthly	Meeting	Project Manager
Training Program Proposal Report	CEO & Management	27-Jan-25 to 30-Jan-25	Presentation/Meeting	Development Team
Training Program Content Draft	CEO & Management	25-Feb-25	Presentation / Meeting	Development Team
Budget Updates	CEO, Management, HR & Finance	Bi-Weekly or Adhoc (as needed)	Email / Meetings	Project Manager & Development Team
Training Program Participation Notification	Training Participants & Management	1-Apr-25 (One Month prior to implementation)	Email / Postings / Workplace Announcement Memo	Project Manager
Corporate Conferral/ Program Adjustment Information	Corporate Representative; CEO & Management Team	25-Mar-25	Conferral Meeting / Brainstorming (could be in person, Zoom, etc.)	Development Team
Tier 1 Training Session Details: Times, Location, Dates, Participants, etc.	Participants and Their Superiors; Management team	1-May-25	Email	Project Manager
Tier 2 Training Session Details: Times, Location, Dates, Participants, etc.	Participants and Their Superiors; Management team	6-May-25	Email	Project Manager
Tier 3 Training Session Details: Times, Location, Dates, Participants, etc.	Participants and Their Superiors; Management team	1-Jun-25	Email	Project Manager
Post Training Follow Up	Participants; Management team	20-Jun-25	Meeting / Presentation	Development Team / Training Professionals
Program Competency Measurement	Participants; Management team; CEO	20-July-25	Meeting and Evaluation Session	Development Team / Training Professionals
Follow up Inquiries / Additional Employee Resources	Participants	Available post-training & continuously available for the remainder of the year + on request	Online Resources / In-Person Meetings for Discussion and Inquiries	Project Manager / Development Team / Training Professionals
Postmortem Optimization Recos & Additions for Future Use	CEO; Management Team	20-July-25	Emails / Meeting as req.	Project Manager / Development Team

Lack of Employee Engagement	Sharing Risk	Training for supervisors and/or managers, followed by group or 1:1 meeting to discuss the training material	Lack of involvement and participation in the training sessions followed by minimal displays of learning in daily tasks/interactions
Legal Liability	Avoiding Risk / Transferring Risk	Lawyer consultations and a legal team in place to address any complaints, concerns, or claims regarding the legality of the training material, execution, and personnel	Claims, complaints or concerns regarding the legality compliance in the training program activities; including claims related to discrimination, harassment, negligence, privacy, or failure to meet regulatory requirements.
Wasted Resources	Mitigate Risk	Redeploy unused content or materials; assess return on investment in post-training and adjust strategy if necessary	Lack of participation during the training program meaning certain resources are unused, absences on training days
Worker Complacency	Mitigate Risk	Tying training directly to performance and evaluations incentivises employees to retain the material to be able to utilize it in daily tasks; use public recognition systems to initiate friendly competition and encourage use of training material	Passive participation from seasoned employees or resistant behaviours during/after the training, as well as negative commentary about the program
Technical Issues	Avoiding Risk	Have back up paper copies of material or even a projector to ensure the presentation proceeds; have extra laptops/computers as well as extra charging cords and available outlets	Wi-Fi-outage, lack of battery power for the computers at any point during the training, errors regarding accessing the material
Delayed Productivity	Risk Retention	Overtime could be utilized to make up the lost production hours or to cover the missing employees, but replacement/temporary workers could also be utilized	The trigger for delayed productivity is the occurrence of the training program in general

Project Estimate

The allocated budget for the training program is \$400,000.00, the below provides a comprehensive breakdown.

Project Budget & Breakdown

Budget: Project North Star						
Details: The following budget is inclusive of Project North Star, with a proposed schedule of January - September, 2025. The initial budget is based on estimates, with ongoing monthly reconciliation with actuals. Funds quoted in CAD\$.					Version: 1	
					Prepared By: Triad Consulting Group	
Program Deliverables	Direct \$	InDirect \$	Dev. \$	Overhead \$	Total (\$)	Total (%)
ASSESSMENT						
Competency & Capability Audit			\$ 7,500		\$ 7,500	1.88%
Needs & Gap Analysis			\$ 5,000		\$ 5,000	1.25%
Solution & Projections Development			\$ 5,000		\$ 5,000	1.25%
Proposal Report			\$ 10,000		\$ 10,000	2.50%
ASSESSMENT TOTAL	\$ -	\$ -	\$ 27,500	\$ -	\$ 27,500	6.88%
DESIGN						
Program Wireframe (Structure) Dev.			\$ 25,000		\$ 25,000	6.25%
Evaluation Process & Criteria Dev.			\$ 15,000		\$ 15,000	3.75%
Finalized Program Wireframe (Structure)			\$ 5,000		\$ 5,000	1.25%
DESIGN TOTAL	\$ -	\$ -	\$ 45,000	\$ -	\$ 45,000	11.25%
DEVELOP						
Program Content Development			\$ 50,000		\$ 50,000	12.50%
Corporate/Expert Conferral & Revision			\$ 15,000		\$ 15,000	3.75%
Final Training Program			\$ 10,000		\$ 10,000	2.50%
DEVELOP TOTAL	\$ -	\$ -	\$ 75,000	\$ -	\$ 75,000	18.75%
DELIVER						
LONDON TRAINING SESSIONS						
Tier 1 Training Day: Full Organization						
Training Day Instructor Fee	\$ 7,500				\$ 7,500	1.88%
Travel & Per Diem Expenses	\$ 2,500				\$ 2,500	0.63%
Meals, Beverages, Snacks	\$ 1,500				\$ 1,500	0.38%
Training Day Materials	\$ 1,000				\$ 1,000	0.25%
Classroom Space & Equipment	\$ 1,500				\$ 1,500	0.38%
Administrative Prep, 2 Days		\$ 2,500			\$ 2,500	0.63%
Pre & Post Learning Materials		\$ 1,500			\$ 1,500	0.38%
Utilities				\$ 500	\$ 500	0.13%

Tier 1 Training Day Total	\$ 14,000	\$ 4,000	\$ -	\$ 500	\$18,500	4.63%
Tier 2 Training Days: Management						
Training Day Instructor Fee (x2)	\$ 15,000				\$15,000	3.75%
Travel & Per Diem Expenses (x2)	\$ 5,000				\$5,000	1.25%
Meals, Beverages, Snacks (x2)	\$ 1,500				\$1,500	0.38%
Training Day Materials (x2)	\$ 2,000				\$2,000	0.50%
Classroom Space & Equipment (x2)	\$ 3,000				\$3,000	0.75%
Administrative Prep, 3 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials (x2)		\$ 3,000			\$3,000	0.75%
Utilities (x2)				\$ 1,000	\$1,000	0.25%
Tier 2 Training Day Total	\$ 26,500	\$ 5,500	\$ -	\$ 1,000	\$37,000	8.25%
Tier 3 Training Day: Non-Management						
Training Day Instructor Fee	\$ 7,500				\$7,500	1.88%
Travel & Per Diem Expenses	\$ 2,500				\$2,500	0.63%
Meals, Beverages, Snacks	\$ 1,500				\$1,500	0.38%
Training Day Materials	\$ 1,000				\$1,000	0.25%
Classroom Space & Equipment	\$ 1,500				\$1,500	0.38%
Administrative Prep, 2 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials		\$ 1,500			\$1,500	0.38%
Utilities				\$ 500	\$500	0.13%
Tier 3 Training Day Total	\$ 18,000	\$ 4,000	\$ -	\$ 500	\$18,500	4.63%
LONDON TRAINING SESSIONS TOTAL	\$ 35,500	\$ 13,500	\$ -	\$ 2,000	\$70,000	17.50%
TORONTO TRAINING SESSIONS						
Tier 1 Training Day: Full Organization						
Training Day Instructor Fee	\$ 7,500				\$7,500	1.88%
Travel & Per Diem Expenses	\$ 2,500				\$2,500	0.63%
Meals, Beverages, Snacks	\$ 1,500				\$1,500	0.38%
Training Day Materials	\$ 1,000				\$1,000	0.25%
Classroom Space & Equipment	\$ 1,500				\$1,500	0.38%
Administrative Prep, 2 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials		\$ 1,500			\$1,500	0.38%
Utilities				\$ 500	\$500	0.13%
Tier 1 Training Day Total	\$ 14,000	\$ 4,000	\$ -	\$ 500	\$18,500	4.63%
Tier 2 Training Days: Management						
Training Day Instructor Fee (x2)	\$ 15,000				\$15,000	3.75%
Travel & Per Diem Expenses (x2)	\$ 5,000				\$5,000	1.25%

Meals, Beverages, Snacks (x2)	\$ 1,500				\$1,500	0.38%
Training Day Materials (x2)	\$ 2,000				\$2,000	0.50%
Classroom Space & Equipment (x2)	\$ 3,000				\$3,000	0.75%
Administrative Prep, 3 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials (x2)		\$ 3,000			\$3,000	0.75%
Utilities (x2)				\$ 1,000	\$1,000	0.25%
Tier 2 Training Day Total	\$ 26,500	\$ 5,500	\$ -	\$ 1,000	\$33,000	8.25%
Tier 3 Training Day: Non-Management						
Training Day Instructor Fee	\$ 7,500				\$7,500	1.88%
Travel & Per Diem Expenses	\$ 2,500				\$2,500	0.63%
Meals, Beverages, Snacks	\$ 1,500				\$1,500	0.38%
Training Day Materials	\$ 1,000				\$1,000	0.25%
Classroom Space & Equipment	\$ 1,500				\$1,500	0.38%
Administrative Prep, 2 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials		\$ 1,500			\$1,500	0.38%
Utilities				\$ 500	\$500	0.13%
Tier 3 Training Day Total	\$ 14,000	\$ 4,000	\$ -	\$ 500	\$18,500	4.63%
TORONTO TRAINING SESSIONS TOTAL	\$ 54,500	\$ 13,500	\$ -	\$ 2,000	\$70,000	17.50%
CALGARY TRAINING SESSIONS						
Tier 1 Training Day: Full Organization						
Training Day Instructor Fee	\$ 7,500				\$7,500	1.88%
Travel & Per Diem Expenses	\$ 2,500				\$2,500	0.63%
Meals, Beverages, Snacks	\$ 1,500				\$1,500	0.38%
Training Day Materials	\$ 1,000				\$1,000	0.25%
Classroom Space & Equipment	\$ 1,500				\$1,500	0.38%
Administrative Prep, 2 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials		\$ 1,500			\$1,500	0.38%
Utilities				\$ 500	\$500	0.13%
Tier 1 Training Day Total	\$ 14,000	\$ 4,000	\$ -	\$ 500	\$18,500	4.63%
Tier 2 Training Days: Management						
Training Day Instructor Fee (x2)	\$ 15,000				\$15,000	3.75%
Travel & Per Diem Expenses (x2)	\$ 5,000				\$5,000	1.25%
Meals, Beverages, Snacks (x2)	\$ 1,500				\$1,500	0.38%
Training Day Materials (x2)	\$ 2,000				\$2,000	0.50%
Classroom Space & Equipment (x2)	\$ 3,000				\$3,000	0.75%
Administrative Prep, 3 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials (x2)		\$ 3,000			\$3,000	0.75%

Utilities (x2)				\$ 1,000	\$1,000	0.25%
Tier 2 Training Day Total	\$ 26,500	\$ 5,500	\$ -	\$ 1,000	\$33,000	8.25%
Tier 3 Training Day: Non-Management						
Training Day Instructor Fee	\$ 7,500				\$7,500	1.88%
Travel & Per Diem Expenses	\$ 2,500				\$2,500	0.63%
Meals, Beverages, Snacks	\$ 1,500				\$1,500	0.38%
Training Day Materials	\$ 1,000				\$1,000	0.25%
Classroom Space & Equipment	\$ 1,500				\$1,500	0.38%
Administrative Prep, 2 Days		\$ 2,500			\$2,500	0.63%
Pre & Post Learning Materials		\$ 1,500			\$1,500	0.38%
Utilities				\$ 500	\$500	0.13%
Tier 3 Training Day Total	\$ 14,000	\$ 4,000	\$ -	\$ 500	\$18,500	4.63%
CALGARY TRAINING SESSIONS TOTAL	\$ 54,500	\$ 13,500	\$ -	\$ 2,000	\$70,000	17.50%
DELIVER TOTAL	\$ 163,500	\$ 40,500	\$ -	\$ 5,000	\$210,000	52.50%
EVALUATION						
Post-Training F/U, Competency Measures			\$ 10,000		\$ 10,000	2.50%
Program Feedback & Evaluation			\$ 5,000		\$ 5,000	1.25%
Post-Mortem & Optimization Recos			\$ 2,500		\$ 2,500	0.63%
Optimized Training Program			\$ 10,000		\$ 10,000	2.50%
EVALUATION TOTAL	\$ -	\$ -	\$ 27,500	\$ -	\$ 27,500	6.88%
ADMINISTRATION						
General Administrative Duties			\$ 15,000		\$ 15,000	3.75%
ADMINISTRATION TOTAL	\$ -	\$ -	\$ 15,000	\$ -	\$ 15,000	3.75%

GRAND TOTAL: Project North Star	\$ 400,000
SET BUDGET	\$ 400,000
EST +/- (\$)	\$ -
EST +/- (%)	-100.00%

Stakeholders

The below summarizes stakeholders for TDC Project North Star, inclusive of roles & strategic interests/influences:

Stakeholder	Role	Strategic Interests & Influences
Techno Digital Corporation		
Valentina DeCarlo <i>CEO</i>	Lead Client	Spearheading strategic change for the organization, responsible for ensuring TDC leadership is on-board with the training proposal, aligning to measurement KPIs/outputs, and championing the organization's evolution across all departments.

Jane Atkins <i>Senior HR Director</i>	Strategic Lead	Checks the project's alignment with the operating directions and strategy, with the talent strategy.
Regional Office Managers	Operational Stakeholders	Enable program roll-out logistics in the Toronto, Calgary, and London offices.
Training & Development Team	Content Designers	Creates and tailors training materials.
IT Department	Technical Support	Grants access to the LMS, virtual training tools, and clinical integration.
Employees (End Users)	Program Participants	Attend the training, and their performance and feedback determine the success of the program.
Communication Manager	Messaging and Updates	Copes with internal communication and messaging promptly, conveying information.
Triad Consulting Group		
Kamala Harris <i>President & CEO</i>	Project Sponsor	Guarantees that the project is on track with the organization's goals and facilitates funding.
Elizabeth Rivers <i>Project Manager</i> Faith Marentette <i>Content Developer</i>	Consultant Team	Responsible for leading proposal and training program development, implementation, optimization, and measurement.

Project Resources

Project Staff and Roles

TDC Employee	Role	Responsibilities
John Smith	Testing Lead	Conduct all stages of testing, ensure requirement traceability, and validate content.
Maria Gomez	Instructional Designer	Create strategic training modules that align with the organization's competencies and goals.
Sarah Choi	Project Manager	Control the overall timeline, scope, deliverables, and coordination of all the team activities.
Daniel Ahmed	IT Integration Specialist	Configure the LMS and other training amenities, IT-related tasks.
Priya Nair	Communication Lead	Prepare internal communication and reporting for stakeholders about the progress of the project being developed.

Other Project Resources

Resource	Purpose
LMS Platform <i>(e.g., SAP Litmos or Moodle)</i>	Distribution and monitoring of training modules for all global offices for consultancy and international association.
Video Conferencing Tools <i>(e.g., Zoom)</i>	For training sessions (remote attendees as required) and live virtual interactions.
Workspaces/Classrooms <i>(3 sites)</i>	For in-person training

Printing and Office Supplies	Workbooks, training manuals, onboarding documents, and other materials.
Evaluation Tools <i>(e.g., SurveyMonkey)</i>	Collecting feedback and evaluations after training sessions.

Training Objectives

Tier	Key Competencies	Training Objectives	Training Groups
1	Mission, Vision & Strategic Goals	Immerse all employees with TDC’s business strategy and make them adapt TDC’s strategy to their role by emphasizing the mission, vision and strategic goals and how they are applicable to daily tasks; followed by individuals producing examples.	All Employees
2	Communication, Collaboration, Creativity, and Adaptability	Further develop people leadership and cross-functional collaboration, done through group participation in proposed scenarios and discussions regarding daily use of relevant competencies.	Management Employees
3	Customer Service and Technical Skills	Enhance service delivery, proactive responsiveness, and digital skills mastery in routine operations displayed through accurate role-playing of daily tasks applicable to customer service and technical skills.	Non-Management Employees

Training Duration & Delivery

Tier	Timing	Duration	Delivery Strategy and Methods
1	w/o April 18	1 Day (6 hours incl. breaks)	In-person
2	w/o May 5	2 Days (6 hours/day incl. breaks)	Workshop with break-out activities
3	w/o June 2	1 Day (9 hours incl. breaks)	Blended eLearning, practical demonstration

Lesson Plan Outline

Tier 1 Lesson Plan: Organizational Mission, Values & Strategy Workshop (Saks, 2024)	
Organization: Techno Digital Corporation Department: Full Agency Program: Organizational Mission, Values & Strategy Instructors: Triad Consulting Group Trainees: All Employees	Time Allocation: 1 Day, 6 Hours w. Breaks Locations: <ul style="list-style-type: none"> - London: 12 Maple Street, Suite 8A - Toronto: 98 King Street W., Auditorium 3 - Calgary: 72 Topper Road, Conference Room 2
Training Objective Employees will be immersed in TDC’s business strategy, including mission, values, and goals, and equipped with actionable tools, resources, and principles to actively integrate into individual, team, or department roles and responsibilities.	
Classroom Requirements: Conference Centre or Auditorium is ideal for large audiences (500+) <ul style="list-style-type: none"> - London Capacity: Seats up to 500 - Toronto Capacity: Seats up to 1,000 - Calgary Capacity: Seats up to 500 - Accessibility compliant - Technology: Computer with internet access, projector with adapter cords, sound system with microphone, dimmable lighting - Room Setup: U-shape rows or multi-roundtable layout to encourage open discussion and interaction <ul style="list-style-type: none"> - Source additional tables and/or breakout rooms for group activities/exercises 	

<p>Training Materials & Equipment</p> <ul style="list-style-type: none"> - Printed training manuals and handouts/workbooks - Interactive digital section: Tablet or laptop with adaptor cords - Whiteboard and markers - Digital Pre/Post assessment via TDC’s LMS - Pre-filled survey for evaluation 									
<p>Trainee Supplies</p> <ul style="list-style-type: none"> - Printed handouts/workbooks - Quick reference guides - Postcards - Pens and notepads - Participation cards and name tags 									
<p>Trainee Handouts</p> <ul style="list-style-type: none"> - Workshop agenda overview with topics & objectives - Techno Digital Corp brand book, inclusive of: <ul style="list-style-type: none"> - Organization history - Organization today & business objectives - Industry & competitive landscape - Strategic imperatives - Additional information and digital resource references - Actionable guides for strategy & workforce/role integration - Copy of Build Your Brand activity 									
<p>Workshop Objective</p> <p>Employees will be taken through the journey of TDC, from its history and founding years to today’s evolution. They will be immersed in TDC’s current business state and strategic imperatives - inclusive of mission, values, and goals - and the importance of being a strategic champion across the organization. Employees will then be equipped with the tools, resources, and principles necessary to integrate TDC’s strategy with daily individual, team, or department roles and responsibilities.</p>									
<p>Trainees: All Techno Digital Corp employees (Management & Non-Management) Trainee Arrivals & Breakfast: 8:30 – 9:00 a.m. Workshop Run Time: 9 a.m. - 3:00 p.m.</p>									
<p>Workshop Agenda & Outline</p> <table border="1"> <thead> <tr> <th>Time</th> <th>Topics & Details</th> </tr> </thead> <tbody> <tr> <td>9:00 - 9:15</td> <td> <ul style="list-style-type: none"> - Welcome and introductions - Brief overview of workshop schedule, content, and objectives </td> </tr> <tr> <td>9:15 - 10:00</td> <td> <ul style="list-style-type: none"> - Show PPT presentation on the foundation of strategic imperatives of an organization <ul style="list-style-type: none"> - Topics: Mission statements, values, strategic goals - Content: Definitions, roles, and various real-world organization examples - Activity: Ask trainees to share their own real-world organization mission statements or values that are highly recognizable. Encourage open discussion and debate on organization and consumer effectiveness. - Reserve 5 minutes for open discussions/questions </td> </tr> <tr> <td>10:00 - 11:15</td> <td> <ul style="list-style-type: none"> - Walk through TDC brand book breaking down the organization’s history and current state, industry & competitor landscape, business objectives, and strategic mission/values/goals - Reserve 15 minutes for open discussions/questions </td> </tr> </tbody> </table>		Time	Topics & Details	9:00 - 9:15	<ul style="list-style-type: none"> - Welcome and introductions - Brief overview of workshop schedule, content, and objectives 	9:15 - 10:00	<ul style="list-style-type: none"> - Show PPT presentation on the foundation of strategic imperatives of an organization <ul style="list-style-type: none"> - Topics: Mission statements, values, strategic goals - Content: Definitions, roles, and various real-world organization examples - Activity: Ask trainees to share their own real-world organization mission statements or values that are highly recognizable. Encourage open discussion and debate on organization and consumer effectiveness. - Reserve 5 minutes for open discussions/questions 	10:00 - 11:15	<ul style="list-style-type: none"> - Walk through TDC brand book breaking down the organization’s history and current state, industry & competitor landscape, business objectives, and strategic mission/values/goals - Reserve 15 minutes for open discussions/questions
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11:15 - 11:30	<i>Bio Break</i>
11:30 - 12:30	<ul style="list-style-type: none"> - Lecture on how TDC's applies its strategic imperatives to organizational systems, processes, policies, departments, and other functions - Review hand-out materials about job/role application guidelines - Reserve 10 minutes for open discussion/questions
12:30 - 1:15	<i>Lunch Break (Catered)</i>
1:15 - 2:00	<ul style="list-style-type: none"> - Activity: Build Your Brand - Details: Give trainees an outline of a made-up company that is building its strategy from the ground-up. Provide information for the organization's: <ul style="list-style-type: none"> - Industry, including the organization's product/service domain - Organizational capabilities (existing & desired) - Talent pools and management structure - Thought starters on the criterium that needs to be built out into a strategic framework - Task: Trainees will use the information to create their own organization brand strategy, including details on: <ul style="list-style-type: none"> - Organization/Brand Name - 1x Mission Statement - 3x Values - 3x Business Objectives - Note: This activity is individually-based, however allow trainees to break out into groups as desired to collaborate and discuss their organization builds.
2:00 - 2:45	<ul style="list-style-type: none"> - Activity Debrief: Review and evaluate activity results including perceptions, concerns or challenges, opportunities, and actionable solutions to further enforce job transfer - Facilitate and encourage open discussion and debate amongst trainees vs. providing direct answers.
2:45 - 3:00	<ul style="list-style-type: none"> - Provide a brief recap of TDC strategy & successful application to daily roles/tasks/duties - Review workshop feedback survey/tools - Provide brief overview of post-training evaluations/follow-ups - Outline additional information, resources, and Triad Consulting Group contact information - Thank participants for attending and participating - Workshop wrap offer to hang back for 30 minutes for casual questions/chats/feedback

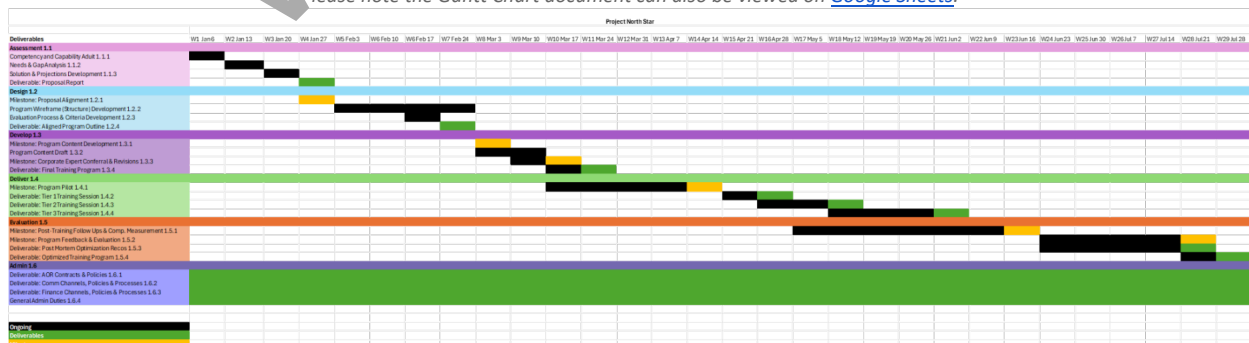
Evaluation Plan

Activities and Objectives	Essential Indicators	Formative, Process, or Summative Evaluation	Target	Data Collection Method	Person Collecting Data	Time frame for collection	Communication Required
Entire Employee Participation/ Attendance	Training Attendance Rate	P	100% participation	Attendance Report / Sheet	Admin for Role Call or Participants Sign-in	Collected during Training	Participants will be notified of the necessity of signing-in for attendance
Track how many participants complete all training components	Course Completion Rate / % of Enrolled Participants	S	>95% Completion	Completion Certificate/ Confirmation	Admin	Immediately Post-Training	Completion Reminder via Email

Measure efficiency and engagement with content	Average Time to Completion	P	1 Day	Time-Logs	Training Instructor / Admin	During Training	Participants advised of estimated time for training completion
Evaluate knowledge and skills gained from training	Post-training Assessment Results / % of Improvement in Test Scores	S	>80% Average Score	Pre and Post Tests	Trainers & HR Team (Analyst)	Before & After Training	Explain the purpose of testing to the training participants before and after sessions
Measure participant (employee) satisfaction with training quality and execution/delivery	Learner Satisfaction Rate / % Rating Training as "Satisfactory"	S	>85% Satisfaction	Post Training Feedback Forms & Online Questionnaire	Training Dev. Team / HR Team	Immediately Post-Training	Encourage honest feedback through anonymous/confidential surveys; have supervisors remind employees to complete surveys
Measure how much knowledge is retained over time	Learner Retention Rate / % Correct Answers	S	>75% Retention Rate	Follow up Quiz / Refresher Test	Supervisors / HR Team	2-3 Months Post-Training	Notify both participants and their superiors of upcoming retention checks
Assess whether training is applied on the job/ in daily tasks	Job Performance Impact / Superior Feedback / Performance KPIs	S	Observable Behaviour Change	Observation by Superior / KPI Comparison	Managers / Supervisors / Team Leads	1-3 Months Post-Training	Managers/ supervisors/ team leads briefed to monitor performance post training for learning indicators
Evaluate if the training provided value relative to the cost invested	Training ROI (Return on Investment) / ROI Percentage / Cost-Benefit Analysis	S	Positive (>0%)	Cost of Training vs. Gains (perf.)	HR Analyst / Finance	3-6 Months Post-Training	Share purpose of ROI evaluation with leadership; gather post training business impact data

Gantt Chart

Please note the Gantt Chart document can also be viewed on [Google Sheets](#).



Authorization and Documentation Control

Project Sponsor Approval

K. Harris Date: August 1, 2025

Kamala Harris
Sponsor, Project North Star
President & CEO
Triad Consulting Group

Work Sample