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**Instructor’s Guide**

TSP Team Member Training

April, 2013

The Software Engineering Institute  
Carnegie Mellon University  
Pittsburgh, Pennsylvania

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Introduction

|  |  |
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| In this section | This guide provides instructor guidance for teaching the course, *TSP Team Member Training*.[[1]](#footnote-1)  This section of the guide includes the following:   * instructor qualifications * course audience * course goals |

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| --- | --- |
| Instructor qualifications | This guide is a reference for SEI-Authorized PSP Instructors. SEI-Authorized PSP Instructors are required to successfully complete the *PSP Fundamentals* course, the *PSP Advanced* course, and the *PSP Instructor Training* course. Therefore, it is assumed that the instructor is already very knowledgeable about PSP and TSP practices.  While it is highly recommended that the instructor observe the course before teaching it, doing so is not a prerequisite for teaching the course.  The suggestions in this guide are based on the experiences of instructors at the Carnegie Mellon[[2]](#footnote-2)® Software Engineering Institute (SEI) and of many other experienced instructors who have taught the PSP and TSP courses to thousands of attendees. |

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| Course audience | The primary audience for this course includes individuals who are, or will be, members of a TSP team. A companion course titled, *Leading a Development Team* is more appropriate for individuals who will be serving as a Team Leader of a TSP team.  Individuals who have taken the Personal Software Process (PSP) course can also benefit from this course. However, some of the concepts introduced in the course are also covered in the PSP course. |

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| Course goal | The over-arching goal of this course is to prepare individuals to participate effectively on a Team Software Process (TSP) team.  The TSP Team Member Training introduces the attendees to a set of disciplined methods for producing quality products on time and within budget.  During this course, attendees are introduced to the fundamentals of the TSP including   * the personal process as a guide to performing work * personal and team-based planning techniques * quality management   + team building and project planning via the TSP launch   + dynamic planning and accurate tracking of work |

Course Overview

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| Course organization | The course is organized into modules with each module addressing a specific set of topics.  Modules are composed of lectures and/or exercises.  *Lectures* provide the instructor the opportunity to describe PSP/TSP concepts, facilitate discussions, and answer attendee’s questions. An important part of the classroom lectures is reinforcing the materials through discussion and interaction.  *Exercises* provide attendees the opportunity to practice skills that they will need when participating on TSP teams. Exercises also provide the instructor an opportunity to access whether attendees are learning the course content. It is especially important that the instructor be well prepared for exercises. The course exercises depend heavily on the instructor’s ability to focus attendee attention and effort to meeting the exercise objectives. |

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| Course agenda | A 2 ½ -day course agenda is included as Appendix A on page 32. This agenda is a copy of the agenda that attendees receive.  Appendix B, on page 35, provides a detailed listing of activities during the course. You should track your progress during the course using this schedule. |

|  |  |
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| Module topics | Table 1 lists the course modules and the topics treated within each module. |

Table 1. Course Modules, Number of Slides, and Module Topics.

|  |  |  |  |
| --- | --- | --- | --- |
| Mod. # | Module | Number of slides | Topics |
| 1 | Introduction | 21 | * Introductions * Why are we here? * Why do teams succeed or fail? * Team-building issues * Course objectives * Review of course agenda |

*Table continues on next page*

|  |  |
| --- | --- |
| Module topics, cont. | Table continued from the previous page. |

|  |  |  |  |
| --- | --- | --- | --- |
| Mod. # | Module | # slides | Topics |
| 2 | TSP Overview | 51 | * Knowledge work and the TSP * Self-managed teams * Supportive environment * Guidance produced by a defined process framework * Mechanisms that foster congruent communication |
| 3 | TSP Process Elements | 37 | * Process basics * Key elements of a process description * Defining *your* personal process * A TSP mechanism for process improvement |
| 4 | TSP Planning Framework | 87 | * Overview: TSP planning process * Defining the requirements * Developing a conceptual design * Estimating size and effort * Developing the project schedule |
| 5 | Managing Quality | 41 | * Defining quality * The cost of quality * Defect removal techniques * TSP quality measures |
| 6 | The TSP Launch | 104 | * Establish product and business goals * Assign roles and define team goals * Produce development strategy & process * Build overall and near-term plans * Develop the quality plan * Build individual and consolidated plans * Conduct risk assessment * Prepare management briefing & launch report * Hold management review * The launch postmortem |

*Table continues on next page*

|  |  |
| --- | --- |
| Module topics, cont. | Table continued from the previous page. |

|  |  |  |  |
| --- | --- | --- | --- |
| Mod. # | Module | # slides | Topics |
| 7 | Managing Your Work | 30 | * Establishing a daily planning and tracking routing * Task management * Task management issues |
| 8 | The Weekly Status Meeting | 41 | * A description of the weekly status meeting * Schedule status indicators |
| 9 | Getting Better At It | 18 | * The checkpoint review * Cycle and project postmortems * Process improvement simulcast |

Course Administration and Classroom Management

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| --- | --- |
| Introduction | This section addresses the activities that occur before, during, and after the course. |

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| --- | --- |
| In this section | This table lists the topics covered in this section. |

|  |  |
| --- | --- |
| **Topic** | **See page** |
| Before the course | 7 |
| During the course | 10 |
| After the course | 15 |

Before the Course

Course Administration and Classroom Management

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| Introduction | Preparation is key to conducting a successful course experience—for both the attendees and the instructor. Preparation involves handling the administrative activities to set up the course. It also includes study and review by the instructor so that the course topics are delivered in a professional and effective manner. |

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| The course materials | The course materials include not only the instructional materials but also documents that are intended to help you prepare for the course delivery.  The course materials are included as a set of folders. When you download the materials from the Partner Resource Center, the top-level folder should be labeled, *TSP Team Member Training 2013.04.*  Appendix C on page 38 includes a table that illustrates the structure and organization of this folder. |

Table 2. Folders and Content Description for Course Materials.

|  |  |
| --- | --- |
| Subfolder | Content description |
| Collateral | Contains documents for organizing the delivery of a course. |
| Course Notebook | The course materials including table of contents and agenda, presentation slides, exercises, and notebook packaging templates. |
| Handouts | Solutions to the exercises. |
| Instructor Materials | Instructor guide (this document). |

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| The *Collateral* folder | Table 3 lists and describes the documents that are located in the *Collateral* folder. The purpose of these documents is to provide assistance and support for organizing the delivery of the course. |

Table 3. Collateral Folder Contents.

|  |  |
| --- | --- |
| Document | Description |
| TL Course Checklist.docx | A task list for organizing a course delivery |
| TL Facilities Specification.docx | Describes the recommended classroom set-up |
| TL Notebook & Handout Instructions.docx | Instructions for organizing the attendee notebook prior to distribution |
| TL Precourse Letter.docx | A template letter for communicating with registered attendees |
| TL Supply List.docx | A list of supplies |

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| Videos used during the course | The videos used in this course are downloaded from the Partner Resource Center. The zip file that includes the videos is labeled, *Team Member Videos,* and it is listed as a separate download from the other course materials. |

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| Course capacity | Course registration should not exceed 25 attendees. There are two reasons for establishing this limit.   * The need to provide an adequate amount of time for participating in, and debriefing group exercises. * Too large a class makes it difficult for all participants to comment, ask questions, and to interact during lectures.   The instructor may prefer to limit course registration to a size lower than 25 registrants. For example, if the instructor is inexperienced, they may prefer a smaller class to manage. Also, the available classroom size itself may dictate that registration is limited to the size that the classroom can accommodate.  Note: It is important to decide about the registration limit early so that an appropriately-sized classroom can be reserved. |

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| Communicating with registrants | Please send the registrants their pre-course package with plenty of advance time before the course delivery. In that way, they will have adequate time to plan and to prepare for their course experience.  In the pre-course letter, attendees are encouraged to read the textbook before the course delivery. Therefore, please send these materials to them as soon as possible. |

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| Assembling the course materials | Allot yourself plenty of time to assemble the materials. Assembly instructions are included in the *Collateral* folder. |

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| Instructor preparation | All instructors, including seasoned instructors, should carefully review the course materials before delivery. This includes the instructor’s guide, the course presentation materials, the exercises, and the exercise solutions.  As you review the slides, consider what your talking points will be for each slide. (You certainly want to avoid just reading the slide material.) |

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| First-time instructor? | If you are a first-time instructor, then you will want to spend a considerable amount of time preparing for the course. Doing so will help ensure that your course delivery experience is successful and enjoyable—not only for the attendees, but also for you, the instructor.  The preparation recommendations for first-time instructors follow.   * Study the instructor’s guide. * Carefully review the course presentation materials. Think about your talking points and how you will deliver the material using your own examples. Also consider how you will compare and relate content from different parts of the course. * Work through all of the exercises presented in the course. Compare your solutions to the exercise answers provided in the handouts. Consider how you will debrief the exercises during the course. * Review the videos that are used in the course. * Facilitation is a key skill needed during the course. If group facilitation is new to you, review source materials on this topic. |

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| Preparing the classroom | As the course instructor, you are ultimately responsible for the learning environment.  On the day before the course begins, prepare the classroom for the arrival of the attendees the next morning.   * Ensure that the tables are arranged optimally. Every attendee must have a clear view of the projection screen. * The course materials should be neatly set out for each of the attendees. Place markers at each table if the attendee will write their name on a blank tent card. * Check the classroom lights. You should know how to adjust them if needed. * Check the computer and projection equipment to ensure proper working order. * Review the safety procedures for the building. Know where the fire exits are located. * Know where the restroom facilities are. * Are there special security regulations? If so, make sure you are familiar with them so that you can communicate any issues to the attendees the next day.   You also need to consider what you need to do if there are problems. For example, what would you do if a projection bulb burns out? Who can help you with computer-projector connection issues? |

During the Course

Course Administration and Classroom Management

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| Introduction | This section addresses some issues associated with classroom management and facilitation during delivery of the course. |

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| Instructor behaviors | It is essential to maintain a friendly and professional presence in the classroom at all times.  Strive to model the behaviors that you would like to see with the attendees. For example, being prepared, punctual, and organized are traits that you want to demonstrate during the course. |

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| On the first day | On the first day of the course, please arrive sufficiently early before the course begins to ensure that everything is set up and ready to go. This will help to get the course off to a good start.  Be in the classroom early to greet the attendees as they arrive. Introduce yourself and welcome them to the course. |

|  |  |
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| Presenting the course slides | If you have prepared adequately before the course, you will be ready with your talking points for each slide as it is presented. Please cover the content of the slide but do *not* simply read the slide itself. Paraphrase the slide and augment it with your own story, when appropriate. However, be careful about timing and do not spend too much time on any one slide. |



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| Interactions & discussions | An important way of keeping the attendees involved during the course presentations is to frequently engage them with interactions and discussion.  There are a significant number of planned interactions that have been planted throughout the material. Many of these are highlighted in the presentation materials with a unique slide type that serves as a visual cue for setting up an interaction with the attendees. Here is an example of an interaction slide.    When presenting the slide, ask the attendees to think about the question and to jot down their response(s). Then, after a few minutes, collect responses from volunteers as you transcribe them onto a flipchart. Post the flipchart sheet on the wall as they accumulate during the course.  Note: Don’t forget that you must also manage the time during the course. In some cases, you may have to limit the amount of time for an interaction by simply entertaining several responses before moving onward through the course material. |

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| Exercises | A number of exercises are spread throughout the course. Each of these exercises is designated within the course presentation slides using a standard format that displays the title page of the exercise instructions that are provided as hardcopies to the attendees. The slide is a cue for the instructor to set up the exercise.    Example solutions are provided for some, but not all of the exercises. Example solutions to exercises are located in the *Handouts* folder. This table lists the exercises and indicates the ones that have proposed solutions. |

Table 4. Exercises introduced during the course.

|  |  |  |
| --- | --- | --- |
| **Module** | **Exercise Solution** | **Solution provided?** |
| 3 | Process Definition | No |
| 4 | Selecting a Potential Size Measure | No |
| Selecting a Size Measure | Yes |
| Constructing a Relative Size Table | Yes |
| Developing a Schedule | Yes |
| 5 | Identifying Defect Types | No |
| 6 | Launch Meeting 2: Define Team Goals and Roles | No |
| Launch Meeting 3: Provide Development Strategy and Process | No |
| Launch Meeting 4: Build Overall and Near-Term Plans | No |
| Launch Meeting 5:Build Quality Plan | No |
| Launch Meeting 6: Build Individual and Consolidated Plans | No |
| Launch Meeting 7: Conduct Risk Assessment | No |
| 8 | Interpreting Team Data | Yes |

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| Videos | There are two videos that are shown during the course. A discussion follows each of the videos.  Note: Before showing a video, open the file and set them up on your computer screen so that you do not need to search for the file, arrange the window settings, etc., during class time. Having the video ready to go will permit a smooth transition into that part of the course. |

Table 5. Videos displayed during the course.

|  |  |
| --- | --- |
| Video Filename | When used |
| TSP Launch - Meeting 9.m4v | Module 6, *The TSP Launch* (see slide 86). |
| TSP Weekly Meeting.m4v | Module 8, *The Weekly Status Meeting* (see slide 3). |

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| Addressing disruptive behaviors | Classroom management and facilitation skills are critical to maintaining an effective learning environment for the attendees. In some cases, classroom learning is disrupted by behaviors that can be distracting to some and annoying for others.  Setting ground rules at the beginning of the course is one of the best methods of classroom management. This is indeed the purpose of slides 3-4 of the *Introduction* module (i.e., the *Logistics and Guidelines”* slides). Consider placing those slides on the wall or copying those items that represent norms to a flip chart and label the list as “Ground Rules.” Refer to the list when disruptions occur.  Using a clip chart or white board can be especially useful because you can involve the attendees in the construction of the list on the first day and in that way obtain buy-in. Start with a few of your own expectations and ask the class for additional suggestions. When you all agree on how you want the classroom to be managed, disruptions are minimal. |

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| Keeping on track | It's always a good idea to address questions of any kind when they occur because curiosity provides fabulous teaching moments, but sometimes it just isn't appropriate to get off track.  Many instructors use a flip chart or white board as a holding place for such questions to ensure they're not forgotten. Call it the parking lot. Be creative. When a question being held is eventually answered, mark it off the list. | C:\Users\mkasunic\Desktop\iStock_000014176439XSmall.jpg |

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| Managing mild disruptions | Unless you've got a completely obnoxious attendee in your classroom, chances are good that disruptions, when they do occur, will be fairly mild, calling for mild management. We're talking about disruptions like chatting in the back of the room, texting, or someone who is argumentative or disrespectful.  Try one, or more, if necessary, of the following tactics:   * Make eye contact with the disruptive person * Remind the group of the agreed-upon norms * Move toward the disruptive person * Stand directly in front of the person * Be silent and wait for the disruption to end * Acknowledge the input, put it in your "parking lot,”, and move on   + "You may be right."   + "Thanks for your comment."   + "How about if we park that comment and come back to it later." * Ask for help from the group (e.g., “What dos everyone else think?”) * Rearrange the seating if you think it will help * Call for a break |

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| Handling persistent disruptions | For more serious problems, or if the disruption persists:   * Speak with the person privately * Confront the behavior, not the person * Speak for yourself only, not the class * Seek to understand the reason for the disruption * Ask the person to recommend a solution * Review your expectations of classroom behavior if necessary * Try to get agreement on expected norms * Explain any consequences of continued disruptions   While you will likely never encounter persistent disruptions, it is always good to have a game-plan in mind should you encounter such a situation. | \\ad\dfs\Users\mkasunic\Documents\iStock\iStock_000017030053XSmall.jpg |

After the Course

Course Administration and Classroom Management

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| Course evaluation | Ensure that all attendees complete the SEI course evaluation form. |

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| Continuing Education Units (CEUs) | If an attendee has successfully completed the course, they are entitled to continuing education units. Ensure that any attendee who desires to claim the CEUs, completes the *course certificate sheet.* |

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| Send to the SEI | Send the completed certificate sign-in sheets and all course evaluation forms to the SEI. |

The Course Modules

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| --- | --- |
| Introduction | This section provides an overview of each module. The module descriptions in this section do not repeat the information that is already in the course slides. The emphasis is on   * slide intent when it may not be obvious * slides that include animations or builds |

|  |  |
| --- | --- |
| In this section | This table lists the modules described with detail in this section. |

|  |  |  |
| --- | --- | --- |
| Mod. # | Module | See page |
| 1 | Introduction | 17 |
| 2 | TSP Overview | 19 |
| 3 | TSP Process Elements | 20 |
| 4 | TSP Planning Framework | 21 |
| 5 | Managing Quality | 23 |
| 6 | The TSP Launch | 24 |
| 7 | Managing Your Work | 26 |
| 8 | The Weekly Status Meeting | 28 |
| 9 | Getting Better At It | 30 |

Introduction

Module 1

|  |  |
| --- | --- |
| Instructor introduction(s) | The module begins with a welcoming of the attendees as the instructor(s) introduce themselves. Each instructor provides background about their work experience and how they became involved with the PSP and TSP. Consider sharing how the PSP and TSP has helped you and/or your company (e.g., increased productivity, high-quality products, reduced costs, etc.). |

|  |  |
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| Attendee introductions | The instructor then invites introductions from each of the attendees. The attendee can offer:   * their name * organization or project * their role in the organization or project * their expectation(s) for the course   The expectations are recorded on a flip chart. If any of the expectations are not addressed by the course objectives, inform the attendee and offer to talk with them about the topic during a break or over lunch. |

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| What has been your experience working on teams? | After the introductions, the instructor pivots to slide 4 to begin a discussion of “Why are we here?” The motivation is that teams are becoming the basic work unit of organizations. Yet, teams do not always perform as well as expected. Most, if not all individuals have memories, both good and bad, of working on a team. Slide 6 introduces a brief class-based exercise where attendees think about their experiences working on a team. After about five minutes, ask for volunteers that will share their ideas with the class. Write the responses on a flipchart. |

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| Team development takes time | Slides 7-11 explore the reasons why teams succeed or fail and issues related to team formation and team dynamics. An interaction is introduced in slide 11 to challenge attendees to think about how their projects are managed. Record responses on the flipchart and post for viewing throughout the course. You may want to return to some of the ideas later. |

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| Motivation for addressing team performance | Slide 12 describes what’s at stake in terms of the costs of ineffective teams.  Slide 13 highlights the top causes for troubled projects. Use this slide and the next one as an opportunity to hint that these top causes are exactly what the TSP was developed to address. |

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| Course objectives & agenda | The high-level course objectives are presented on slide 16. Slides 17-19 present the three-day agenda. |

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| Logistics and  guidelines | Slides 20-21 present the course logistics and emphasize the guidelines that attendees need to be aware of. Setting up some of these ground rules can help to avert disruptions that were described or alluded to in the *During the Course* section of this document. |

|  |  |
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| Hyperlinks provided on agenda slides | Hyperlinks are embedded in the agenda slides and can be used to access an on-screen version of a module presentation or exercise guidance document.  When you are in *slide show* mode of PowerPoint, point anywhere to the right of an agenda item and click to open up the document associated with that agenda item.    If the hyperlinks become broken for some reason, you can always access the file by navigating to the appropriate location within the folder structure. Appendix C on page 38 illustrates the course folder structure. |

TSP Overview

Module 2

|  |  |
| --- | --- |
| Topic summary | The topics covered in this module include:   * Knowledge work and the TSP * Key attributes of the TSP   + Self-managed teams   + Supportive environment   + Guidance provided by a defined process framework   + Mechanisms that foster congruent communication |

|  |  |
| --- | --- |
| Module  description | This is a high-level overview of the TSP. The content touches upon a number of topics that will be described in detail later in the course. Therefore, there is no need to dwell on any particular slide that is presented during the module.  Slide 6 with title, “What’s In A Name?” is included to emphasize that although the TSP was developed for software teams (hence its name), the approach works equally well for non-software teams.  Slides 31 and 32 use icons to represent a project (the box) and the level of planning that occurs for multiple-cycle projects. That is, detailed planning for the near-term cycle and less-detailed planning for future cycles. You may want to suggest here that a cycle might be referred to as a *sprint* in some organizations.  Slide 33 titled, “The Relaunch” includes the launch diagram with question marks that overlay some of the meeting boxes. This is to reflect the fact that those meetings are optional for a relaunch.  Slide 49 is an animation. The point of the slide is to emphasize that the collection of data is meaningless unless the data is used by team members and the team to support decision-making. |

Process Elements

Module 3

|  |  |
| --- | --- |
| Topic summary | The topics covered in this module include:   * Process basics * Key elements of a process description * Defining *your* personal process * A TSP mechanism for process improvement |

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| Module  description | The module begins with a class interaction around the word and definition, “process.” Record the attendees responses to the questions posed within the blue slides.  Slide 5 is intended to demonstrate that the term “process” can have multiple contexts. At the one extreme are organizational process descriptions. These types of process descriptions describe the high-level activities, roles, and information flows among entities at the business level. At the other extreme is the personal process—a *personal* instruction set that guides us in our work. In the middle is the project or team process that guides a team in performing their shared group processes.  The emphasis in this module is the personal process and also the team process. But the personal process is focused on in slides 6-9.  Slide 11 introduces the set of process elements. It is an overview slide and so there is no need to dwell on it, since each element is described later in slides that follow.  Slide 12 is an animation. You need to practice the animation before the course begins so that the delivery is organized and smooth.  Slides 13-26 describe each of the process elements in detail with examples.  Slide 15 includes a link to a document development script. Click up the link and briefly step through the example.  The remaining slides in the module address the approach to defining and improving personal and team processes. |

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| Exercise | A process definition exercise concludes this module. Be prepared to facilitate a discussion of the attendees’ experience following the exercise. |

TSP Planning Framework

Module 4

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| --- | --- |
| Topic summary | The topics covered in this module include:   * Overview: TSP Planning Process * Defining the requirements * Developing a conceptual design * Estimating size and effort   + Task time is used as the effort estimate   + Selecting a measure for product size   + TSP approach to estimation * Developing the project schedule * Summary |

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| Module  description | The module flow follows the sequence of the TSP planning framework. There are a number of planned interactions that are cued by the slides with a blue background. Use these slides as opportunities to engage the class, but manage the time so that you don’t fall too far behind schedule.  There are a number of examples that you will be stepping through for the attendees. These examples should help to prepare them for the exercises.  Slide 74 is an animation. Use this slide to assess whether attendees can recall the technique introduced earlier during the module. The solution is presented on the next slide.  Slide 79 illustrates how the task schedule and the available team member task hours are merged to form the work schedule. Let the attendees know that the TSP support tool will handle these calculations. However, to use the planning methods properly, team members need to understand how they work.  Slide 80 transitions to how the schedule is tracked using earned value. An example is presented for illustration purposes.  The summary slide shows the stages which were discussed during the module in the context of the overall TSP planning framework. Use this slide to discuss how the planning techniques described in the module fit within the overall planning framework. New teams just starting with TSP will not have any historical data to draw upon. However, by using the planning framework described and tracking to that plan, teams begin to populate their historical data repositories that will be used to improve their estimation and planning capability for future work. |

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| Exercises | There are four exercises in this module. |

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| **Exercise** | **Solution provided?** |
| Selecting a Potential Size Measure | No |
| Selecting a Size Measure | Yes |
| Constructing a Relative Size Table | Yes |
| Developing a Schedule | Yes |

Managing Quality

Module 5

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| Topic summary | The topics covered in this module include:   * Defining quality * The cost of quality * Defect removal techniques * TSP quality measures * Summary |

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| Module  description | The module begins with a discussion of quality concepts. Two definitions of quality are compared and contrasted. The purpose here is to establish operational definitions for what we mean by *quality* in the TSP context.  The concept of *cost of quality* is introduced in the next section. The purpose here is to compare and contrast appraisal and prevention costs as compared to failure costs. Slide 19 uses the metaphor of burnt toast to illustrate the wasteful and unproductive nature of failure costs.  The next section describes the key appraisal techniques used in the TSP.  The key quality measures are described in the section, *TSP Quality Measures.*  The summary slide is intended as a motivational message to attendees. |

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| Exercise | There is a brief exercise that is introduced by slide 9. The title of the exercise is, *Identifying Defect Types*. |

The TSP Launch

Module 6

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| Topic summary | The topics covered in this module include:   * Introduction * Meeting 1: Establish product and business goals * Meeting 2: Assign roles and define team goals * Meeting 3: Produce development strategy & process * Meeting 4: Build overall and near-term plans * Meeting 5: Develop the quality plan * Meeting 6: Build individual & consolidated plans * Meeting 7: Conduct risk assessment * Meeting 8: Prepare management briefing & launch report * Meeting 9: Hold management review * Launch postmortem |

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| Module  description | The module begins with a brief overview of the TSP launch. Each of the launch meetings are then described section-by-section throughout the module.  Given that the presentation follows the flow of the launch meeting sequence, the course presentation slides are self-explanatory. The following table provides additional explanation describing the intention of specific presentation slides. |

|  |  |  |
| --- | --- | --- |
| Slide # | Slide Title | Explanation |
| 41 | Don’t Be Confused | *Conceptual design* was introduced earlier in the course when personal planning was being addressed. Ensure that the attendee understands that a conceptual design is performed at the team level and then an additional conceptual design is performed by individuals when they are allocated a chunk of the team’s conceptual design. |
| 44 | Strategy | *Cycles* are sometimes referred to as *sprints* by teams that have used agile techniques. |
| 56 | Example: Define the Tasks | Ensure that students understand the difference between *tasks* and *phases.* Time tracking is performed against a task. However, the TSP compiles task time within a phase. Quality and schedule measurement indicators are reported by phase. |
| 82 | Describing a Risk | Emphasize that it is important to describe risks using the condition/consequence format so that the risk statement communicates effectively. |

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| Exercises | A set of exercises is included in this module. All exercises are based on a common scenario. The scenario itself is described in a one-page handout that is distributed when slide #35 is presented at the conclusion of the Launch Meeting 2 section. This table lists the exercises in this module and the presentation slide when they are introduced. |

|  |  |
| --- | --- |
| Exercise | Introduced by slide # … |
| Scenario Description | 35 |
| Launch Meeting 2: Define Team Goals and Roles | 36 |
| Launch Meeting 3: Provide Development Strategy and Process | 51 |
| Launch Meeting 4: Build Overall and Near-Term Plans | 58 |
| Launch Meeting 5:Build Quality Plan | 71 |
| Launch Meeting 6: Build Individual and Consolidated Plans | 78 |
| Launch Meeting 7: Conduct Risk Assessment | 84 |

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|  | Use slide 35, *Time for An Exercise,* to introduce the scenario. Provide time for the attendees to read the scenario. Provide an opportunity for questions before breaking out the class into teams to begin work on the Launch Meeting 2 exercise. Teams should typically be composed of between 3-5 attendees (depending on class size).  There is really no set answer or solution to the exercises. The exercise solutions that each group derives will depend on the creative energy of the group.  Each of the exercises is self-explanatory. It is important that you are completely familiar with the exercises before delivering this module. Students will likely have questions about details of the scenario itself. This is similar to teams that have questions about the intention of management or customers. In these cases, either provide additional guidance or have the students list any assumptions that they are making when presenting their results.  During the debrief, provide critical feedback, validation, and praise for the proposed solutions to the exercise challenge(s).  Time management is important If you begin to fall behind schedule, consider one or more of the following remedies:   * Have only one team report out. Ask the other attendees to critique the debrief and add additional comments at the end of the de-brief. Rotate the team that reports out (from exercise to exercise). * Modify the instructions of an exercise. That is, have groups perform a portion of the exercise. * Skip an exercise. |

Managing Your Work

Module 7

|  |  |
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| Topic summary | The topics covered in this module include:   * Establishing a daily planning and tracking routine   + Time-on-task tracking   + Defect tracking   + Work size tracking * Task management * Task management issues * Summary |

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| Module  description | This module addresses the period after the launch, when the team begins to execute their plan. It addresses the daily TSP-based activities that the team member engages in when tracking against their individual plan.  The module begins with diagrams that present a bird’s eye view of the post-launch TSP-based activities. It then addresses time tracking and using earned value for gauging task progress.  Slide 10 (*Simple Example: Earned Value)* is an animated slide and is used as an interaction with the class to reinforce understanding of the definitions that were presented on the preceding slides. This table provides guidance for how to conduct the interaction using the slide build. |

|  |  |
| --- | --- |
| **Mouse click** | **Instructor Script** |
|  | Begin describing the slide as a simple example of an earned value plan. Describe what is on the screen … that there are four tasks and that the effort for each task is estimated during planning. Point out how the *planned value (PV)* is calculated. |
|  | Once the plan is in place, the work begins and the team member begins to conduct work on Task A. |
| 1 | The team member completes work on Task A and finds that they actually spent 10.5 hours of work on the task instead of the 3 hours that was estimated. |
| 2 | *Red highlights are drawn on Task A row to show the relationship between estimated effort and actual effort.* |
|  | 🡪 Here, ask the class what value was earned on this task. |

*Continued on next page*

|  |  |
| --- | --- |
| **Mouse click** | **Instructor Script** |
| 3 | Explain that even though the team member’s effort was three times the value that was estimated, they still only earn the planned value of the task: 30%. |
| 4 | *Red highlights and arrow of first line disappears.* |
| 5 | This begins another example. For Task 2, the team member worked 1.3 hours so they actually completed earlier than the estimated duration for the task. |
| 6 | *Red highlights are drawn on Task A row to show the relationship between estimated effort and actual effort.* |
|  | 🡪 Here, ask the class what value was earned on this task. |
| 7 | Explain that even though the team member’s effort was overestimated and they completed early, they still earn the planned value for the  task: 20% |
| 8 | *The remainder of the table is filled in.* |

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| Have attendees record values | To reinforce the attendees learning, have them write down the values that are exposed during the animation on the hardcopy slide in the course notebook. |

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|  | Slide 11, *Example - Cumulative EV,* displays an EV chart. Attendees should be able to respond that the chart indicates a *behind* schedule situation.  Slides 22 and 23 provide examples of plan output that can be monitored to assess change and trends over time.  The final section of the module presents a number of issues that complicate or confound interpretation of the earned value indicator. Emphasize the guidelines for task organization so that the issues are avoided. |

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| Exercises | There is *not* an exercise for this module. |

The Weekly Status Meeting

Module 8

|  |  |
| --- | --- |
| Topic summary | The topics covered in this module include:   * Introduction * Schedule status indicators |

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| Module  description | The module opens with a video showing a glimpse of a TSP weekly meeting. The video is followed by an interaction and then an elaboration of the importance of the weekly status meeting as a primary team community event.  However, the bulk of the module addresses schedule status indicators. Each of the primary TSP status indicators.  Slide 16, *Simple Example: Earned Value* is the same interaction that was presented during the *Managing Your Work* module. It is repeated here as a formative evaluation to determine if the attendees are “getting it.”  The script for the interaction is repeated here. |

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| **Mouse click** | **Instructor Script** |
|  | Begin describing the slide as a simple example of an earned value plan. Describe what is on the screen … that there are four tasks and that the effort for each task is estimated during planning. Point out how the *planned value (PV)* is calculated. |
|  | Once the plan is in place, the work begins and the team member begins to conduct work on Task A. |
| 1 | The team member completes work on Task A and finds that they actually spent 10.5 hours of work on the task instead of the 3 hours that was estimated. |
| 2 | *Red highlights are drawn on Task A row to show the relationship between estimated effort and actual effort.* |
|  | 🡪 Here, ask the class what value was earned on this task. |

*Continued on next page*

|  |  |
| --- | --- |
| **Mouse click** | **Instructor Script** |
| 3 | Explain that even though the team member’s effort was three times the value that was estimated, they still only earn the planned value of the task: 30%. |
| 4 | *Red highlights and arrow of first line disappears.* |
| 5 | This begins another example. For Task 2, the team member worked 1.3 hours so they actually completed earlier than the estimated duration for the task. |
| 6 | *Red highlights are drawn on Task A row to show the relationship between estimated effort and actual effort.* |
|  | 🡪 Here, ask the class what value was earned on this task. |
| 7 | Explain that even though the team member’s effort was overestimated and they completed early, they still earn the planned value for the  task: 20% |
| 8 | *The remainder of the table is filled in.* |

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| --- | --- |
|  | Slide 22, *Earned Value Example* is again, a repeat slide. The attendees should respond that the chart indicates that the work is behind schedule. Pose the question, “Why is the team behind schedule?” Of course, there is insufficient information in the chart to respond to the question. Ask the students to suggest possible reasons why a team might fall behind schedule and record their responses on flip chart paper. Proposed responses follow on the next slide.  Slide 25 is an animation that is used as an interaction to test student understanding. It begins with a light-hearted picture of a game show host. Click the screen and the *Test Your Understanding* slide is exposed. Ensure that you anticipate this slide and practice with it so that the interaction runs smoothly.  Present the slide and provide attendees some time to figure out the responses to the questions. Ask for volunteers to share their answers and record them on flip chart paper. The solution is presented on the next slide. |

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| Exercise | The module concludes with an exercise, *Interpreting Team Data.* The exercise represents a challenge for some attendees. Circulate among the groups as they are working on the exercise to check progress and to provide hints if necessary.  At the conclusion of the exercise, have at least one team report out and ask the other attendees to critique and comment on the work that was presented. Use the handout to check the results that are provided and to comment on the proposed solution. Distribute the solution handout to the class. |

Getting Better At It

Module 9

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| --- | --- |
| Topic summary | This module addresses the topics   * Checkpoint review * Cycle and project postmortems * Process improvement proposals (PIPs) |

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| --- | --- |
| Module description | This is the final module of the course. It is a rather brief module that is intended to ensure that team members are aware of key events that occur during a TSP cycle after a team launch (since they were only alluded to elsewhere in the course).  Slides 4-5 describe the checkpoint review. A point to be made during presentation of these slides is that the checkpoint is most certainly *not* an audit. It is an intervention that is made to ensure the team is on track. A checkpoint is especially important for a new team. As a team becomes more experienced with the TSP, the need for a checkpoint review diminishes.  Slide 6 emphasizes that an action plan must be developed to address any findings associated with a checkpoint review.  Slides 7-14 address the topic, *Cycle and Project Postmortem*.  Slide 8 describes what a postmortem is in general terms, and then lists and describes the different ways that the term, *postmortem*, is used in the TSP.   1. postmortems conducted at the personal level (e.g., the postmortem at the end of a PSP cycle) 2. launch and re-launch postmortems 3. cycle and project postmortems   Slides 9 and 10 present graphics that provide the context that we are addressing in this module, the cycle and project postmortems.  Slide 11 describes how the postmortem is conducted.  Slides 12-13 list the questions that are asked at the time of a postmortem and the measures (both base and derived) that answer those questions.  Slide 14 illustrates how postmortem data is cycled back through the TSP planning framework so that planning estimates for the next cycle, or the next project, are improved. |

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| Module description, cont. | Slides 15-17 address the topic, *Process improvement proposals (PIPs).*  Slide 16 emphasizes that process improvement is the cornerstone of TSP. The process improvement proposal mechanism is how improvement suggestions are systematically submitted, analyzed and approved before being implemented.  A point to make is that a PIP should be submitted anytime during the project—not just during the postmortem. |

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| --- | --- |
| Exercise | There is no exercise for this module. |

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| Course conclusion | Slide 17 brings the course to a conclusion by noting that process improvement is continuous—it doesn’t stop. That is why process improvement is typically referred to as *continuous process improvement* and represented by a circular cycle. To keep pace with changing technology, innovation, and the competition in the marketplace, successful organizations must constantly improve—just to stay viable. The Watts Humphrey quote emphasizes the point that process improvement and quality must be every team member’s business.  After the conclusion of the module, distribute the course evaluations following the guidance described in the section, *After the Course,* on page 15. |

Appendix A. Course Agenda

This agenda is a version of the agenda that attendees receive as part of their course materials. See Appendix B for a detailed breakdown of activities during the three-day course.

Day One Schedule

|  |  |  |
| --- | --- | --- |
|  |  |  |
| **Time** |  | **Topic** |
|  |  |  |
| 8:00 - 8:40 |  | Introduction |
|  |  |  |
| 8:40 - 9:15 |  | TSP Overview |
|  |  |  |
| 9:50 - 10:00 |  | Break |
|  |  |  |
| 10:00 - 11:10 |  | Process Elements |
|  |  |  |
| 11:20 - 12:00 |  | TSP Planning Framework |
|  |  |  |
| 12:00 - 1:00 |  | Lunch |
|  |  |  |
| 1:00 - 2:55 |  | TSP Planning Framework, cont. |
|  |  |  |
| 2:55 - 3:05 |  | Break |
|  |  |  |
| 3:05 - 4:05 |  | TSP Planning Framework, cont. |
|  |  |  |
| 4:05 - 5:00 |  | Managing Quality |
|  |  |  |

Day Two Schedule

|  |  |  |
| --- | --- | --- |
|  |  |  |
| **Time** |  | **Topic** |
|  |  |  |
| 8:00 - 8:35 |  | Managing Quality, cont. |
|  |  |  |
| 8:35 - 10:10 |  | The TSP Launch |
|  |  |  |
| 10:10 - 10:20 |  | Break |
|  |  |  |
| 10:20 - 12:00 |  | The TSP Launch, cont. |
|  |  |  |
| 12:00 - 1:00 |  | Lunch |
|  |  |  |
| 1:00 - 2:55 |  | The TSP Launch, cont. |
|  |  |  |
| 2:55 - 3:05 |  | Break |
|  |  |  |
| 3:05 - 5:00 |  | The TSP Launch, cont. |
|  |  |  |

Day Three Schedule

|  |  |  |
| --- | --- | --- |
|  |  |  |
| **Time** |  | **Topic** |
|  |  |  |
| 8:00 - 8:40 |  | Managing Your Work |
|  |  |  |
| 8:40 - 10:15 |  | The Weekly Status Meeting |
|  |  |  |
| 10:15 - 10:25 |  | Break |
|  |  |  |
| 10:25 - 10:45 |  | The Weekly Status Meeting, cont. |
|  |  |  |
| 10:45 - 11:15 |  | Getting Better At It |
|  |  |  |
| 11:15 - 11:30 |  | Course Conclusion and Evaluation |
|  |  |  |

Appendix B. Instructor’s Detailed Course Schedule

Day One Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| **Start** | **End** | **Duration** | **Topic** |
| 8:00 am | 8:40 | 0:40 | Introduction |
| 8:40 | 9:50 | 1:10 | TSP Overview |
| 9:50 | 10:00 | 0:10 | Break |
| 10:00 | 10:50 | 0:50 | Process Elements |
| 10:50 | 11:10 | 0:20 | Exercise: Process Definition |
| 11:10 | 11:20 | 0:10 | Debrief Exercise: Process Definition |
| 11:20 | 12:00 | 0:40 | TSP Planning Framework |
| 12:00 pm | 12:10 | 0:10 | Exercise: Selecting a Potential Size Measure |
| 12:10 | 1:10 | 1:00 | Lunch |
| 1:10 | 1:20 | 0:10 | Debrief Exercise: Selecting a Potential Size Measure |
| 1:20 | 1:35 | 0:15 | TSP Planning Framework, cont. |
| 1:35 | 1:55 | 0:20 | Exercise: Selecting a Size Measure |
| 1:55 | 2:05 | 0:10 | Debrief Exercise: Selecting a Size Measure |
| 2:05 | 2:30 | 0:25 | TSP Planning Framework, cont. |
| 2:30 | 2:45 | 0:15 | Exercise: Constructing a Relative Size Table |
| 2:45 | 2:55 | 0:10 | Debrief Exercise: Constructing a Relative Size Table |
| 2:55 | 3:05 | 0:10 | Break |
| 3:05 | 3:30 | 0:25 | TSP Planning Framework, cont. |
| 3:30 | 3:50 | 0:20 | Exercise: Developing a Schedule |
| 3:50 | 4:00 | 0:10 | Debrief Exercise: Developing a Schedule |
| 4:00 | 4:05 | 0:05 | TSP Planning Framework, cont. |
| 4:05 | 5:00 | 0:55 | Managing Quality |

Day Two Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| **Start** | **End** | **Duration** | **Topic** |
| 8:00 am | 8:10 | 0:10 | Managing Quality, continued |
| 8:10 | 8:25 | 0:15 | Exercise: Identifying Defect Types |
| 8:25 | 8:35 | 0:10 | Debrief Exercise: Identifying Defect Types Exercise |
| 8:35 | 9:05 | 0:30 | The TSP Launch |
| 9:05 | 9:35 | 0:30 | Exercise: Define Team Goals and Roles [Meeting 2] |
| 9:35 | 9:55 | 0:20 | Debrief Exercise: Define Team Goals and Roles |
| 9:55 | 10:10 | 0:15 | The TSP Launch, cont. |
| 10:10 | 10:20 | 0:10 | Break |
| 10:20 | 11:10 | 0:50 | Exercise: Produce Development Strategy and Process [Meeting 3] |
| 11:10 | 11:30 | 0:20 | Debrief Exercise: Produce Development Strategy and Process |
| 11:30 | 11:45 | 0:15 | The TSP Launch, cont. |
| 11:45 | 12:00 | 0:15 | Exercise: Build Overall & Near-Term Plans [Meeting 4] |
| 12:00 pm | 1:00 | 1:00 | Lunch |
| 1:00 | 1:30 | 0:30 | Exercise: Build Overall & Near-Term Plans, cont. |
| 1:30 | 1:50 | 0:20 | Debrief Exercise: Build Overall and Near-Term Plans |
| 1:50 | 2:10 | 0:20 | The TSP Launch, cont. |
| 2:10 | 2:35 | 0:25 | Exercise: Develop the Quality Plan [Meeting 5] |
| 2:35 | 2:55 | 0:20 | Debrief Exercise: Develop the Quality Plan |
| 2:55 | 3:05 | 0:10 | Break |
| 3:05 | 3:20 | 0:15 | The TSP Launch, cont. |
| 3:20 | 3:45 | 0:25 | Exercise: Build Individual and Consolidated Plans [Meeting 6] |
| 3:45 | 4:05 | 0:20 | Debrief Exercise: Build Individual and Consolidated Plans |
| 4:05 | 4:20 | 0:15 | The TSP Launch, cont. |
| 4:20 | 4:40 | 0:20 | Exercise: Conduct Risk Assessment [Meeting 7] |
| 4:40 | 4:50 | 0:10 | Debrief Exercise: Conduct Risk Assessment |
| 4:50 | 5:00 | 0:10 | The TSP Launch, cont. |

TSP Team Member Training

Day Three Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| **Start** | **End** | **Duration** | **Topic** |
| 8:00 am | 8:40 | 0:40 | Managing Your Work |
| 8:40 | 9:35 | 0:55 | The Weekly Status Meeting |
| 9:35 | 10:15 | 0:40 | Exercise: Interpreting Team Data |
| 10:15 | 10:25 | 0:10 | Break |
| 10:25 | 10:45 | 0:20 | Debrief Exercise: Interpreting Team Data |
| 10:45 | 11:15 | 0:30 | Getting Better At It |
| 11:15 | 11:30 | 0:15 | Course Conclusion and Evaluations |

Appendix C. Course Folder Structure

|  |  |  |  |
| --- | --- | --- | --- |
| **Top Folder or document** | **2nd Level Subfolder or document** | **3rd Level Subfolder or document** | **Document** |
| Collateral | TL Course Checklist.docx |  |  |
| TL Facilities Specification.docx |
| TL Notebook & Handout Instructions.docx |
| TL Precourse Letter.docx |
| TL Supply List.docx |
| Course Notebook | Cover and Spines | Cover Page.pptx |  |
| Spine Bndr.docx |
| Notebook Contents | Contents | Contents.docx |
| M1. Introduction | L1. Introduction.pptx |
| M2. TSP Overview | L2. TSP Overview.pptx |
| M3. TSP Process Elements | L3. TSP Process Elements.pptx |
| EX3 - Process Definition.docx |
| Example - Document Development Process Script.docx |
| M4. TSP Planning Framework | L4. TSP Planning Framework.pptx |
| EX4.1 - Selecting a Potential Size Measure.docx |
| EX4.2 - Selecting a Size Measure.docx |
| EX4.3 - Constructing a Relative Size Table.docx |
| EX4.4 - Developing a Schedule.docx |

|  |  |  |  |
| --- | --- | --- | --- |
| **Top Folder or document** | **Subfolder or documents** | **Subfolder or document** | **Document** |
| Course Notebook [cont.] | Notebook Contents [cont.] | M5. Managing Quality | L5. Managing Quality.pptx |
| EX5 - Identifying Defect Types.docx |
| M6. The TSP Launch | L6. The TSP Launch.pptx |
| TSP Launch Scenario Description.docx |
| EX6.1 - Launch Meeting 2.pptx |
| EX6.2 - Launch Meeting 3.pptx |
| EX6.3 - Launch Meeting 4.pptx |
| EX6.4 - Launch Meeting 5.pptx |
| EX6.5 - Launch Meeting 6.pptx |
| EX6.6 - Launch Meeting 7.pptx |
| M7. Managing Your Work | L7. Managing Your Work.pptx |
| M8. The Weekly Status Meeting | L8. The Weekly Status Meeting.pptx |
| EX8 - Interpreting Team Data.docx |
| M9. Getting Better At It | L9. Getting Better At It.pptx |
| Tabs | 1tab Contents and Schedule.docx |  |
| 2tab Introduction.docx |
| 3tab TSP Overview.docx |
| 4tab TSP Process Framework.docx |
| 5tab Managing Quality.docx |
| 6tab The TSP Launch.docx |
| 7tab Managing Your Work.docx |
| 8tab The Weekly Status Meeting.docx |
| 9tab Getting Better At It.docx |

|  |  |  |  |
| --- | --- | --- | --- |
| **Top Folder or document** | **Subfolder or documents** | **Subfolder or document** | **Document** |
| Handouts | EX4.2 Selecting A Size Measure - Answer.docx |  |  |
| EX4.3 - Constructing a Relative Size Table- Answer.docx |
| EX4.4 Developing A Schedule - Answer.docx |
| EX8 Interpreting Team Data - Answer.docx |
| Instructor Materials | TM Instructor Guide.docx |
| Release Notes.docx |  |  |  |
| TM - Folder Structure.docx |

1. Version # released during April, 2013. [↑](#footnote-ref-1)
2. SM Personal Software Process and PSP are service marks of Carnegie Mellon University.

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