

Project Charter

Project Information

Project Name and Description

PJ Enterprises has contracted START to provide a learning solution that will assist the organization in meeting its goals of (a) maintaining or exceeding projected targets, (b) maintaining profitability, (c) improving customer service scores by 10%, and (d) increasing the quality of work environment through staff development. Having reviewed a gap analysis with the project sponsor, START agrees to develop and deliver an instructor-led customer service training that can be maintained by PJ Enterprises' staff upon completion of the project. This program will also be supported by the development of a searchable electronic product reference.

Project Manager

Amy Law is the project manager for START on this project.

Project Sponsor

Jane McKenzie is the project sponsor for PJ Enterprises.

Stakeholders and Impact

Stakeholder impacts to the project

Stakeholder	Responsibilities and Impact on the Project	Project Impact on Them
Jane McKenzie, Project Sponsor	Overseeing the project to ensure it meets PJ Enterprise's needs; provides input and signs off at all stages of the project; approves invoices She makes final decisions regarding strategy and content, approving or redirecting the project at each stage.	The results of this project are likely a metric on her performance evaluation. Excellent performance that increases sales and income could mean a raise or promotion.

Stakeholder	Responsibilities and Impact on the Project	Project Impact on Them
Jane McKenzie, Tie-breaker	<p>When reviewers provide contradicting feedback, she makes final decisions regarding next steps and final products.</p> <p>She can unilaterally change the direction of the project.</p>	Her final decisions could generate positive or negative reactions that would need to be addressed diplomatically.
Sheena Perez, Ray Johnson, Sarah Commons, and Maria Gomez, Reviewers and Subject Matter Experts	<p>Provide content information by way of interviews, documentation and demonstrations; give feedback and make recommendations regarding deliverables in development.</p> <p>Their contributions are vital to production; their level of engagement and support of the project goals can significantly impact the quality and timeliness of the project.</p>	<p>Supporting this project is an addition to their already heavy workloads.</p> <p>Some portions of the training may significantly change their accustomed workflows.</p> <p>Successful implementation of the project could result in a happier more satisfying work environment.</p>
Paula Moore and Rosalinda Sanchez, Additional Subject Matter Experts	<p>Provide first-hand user experience information and feedback as to the realistic applicability of project deliverables.</p> <p>They are well positioned to correct assumptions made by those who are only observing the work rather than doing it. If they aren't empowered to speak up about challenges, they may give the project team unfounded, blind confidence resulting in a sub-par final product.</p>	<p>This project will significantly change their workflows and the standard expectations for their position.</p> <p>Successful implementation of the project will leave them and their colleagues better prepared to meet the demands of their jobs.</p>
Sarah Ernster, Tyler Shirey, Amy Law, Robert Bradford, and Teresa Catford, Project Team Members	<p>Completing the bulk of the work on the project for START.</p> <p>Their commitment to the project goals and a collaborative attitude will deliver PJ Enterprises the best possible learning solutions within the project parameters.</p>	<p>Their continued employment with START will be influenced by the success of this project.</p> <p>Successful implementation of the training could result in PJ Enterprises contracting START again in the future.</p>

Stakeholder	Responsibilities and Impact on the Project	Project Impact on Them
Mike Merrill, Department Executive	<p>Ultimately responsible for ensuring his department supports PJ Enterprises business goals.</p> <p>His direct impact on the project has been delegated to Jane McKenzie. As her executive, he still has the authority to influence the project indirectly.</p>	<p>Successful implementation of this project moves PJ Enterprises much closer to achieving their ambitious business goals positioning him as the executive of a pivotal department in a rapidly growing company.</p>
Lucy Feldman, Information Systems	<p>Responsible for interactions with PJ Enterprise's intranet.</p> <p>Her support is key to making the electronic product reference accessible at all TO workstations.</p>	<p>This project could result in a slight increase to her workload as she'll need to ensure TOs have access to the most current version of the electronic product reference.</p> <p>The success of the electronic product reference could highlight the importance of a well-functioning intranet and allow her to argue for additional resources to upgrade as necessary.</p>

Description of Work

Project Purpose

START aims to reduce call time by increasing the accessibility of product information through an electronic format and standard categorization. Reduced call time will both increase customer satisfaction and drive sales.

START also intends to address the 30% increase in customer service complaints by creating and implementing instructor-led customer service training for telephone operators and customer service supervisors.

Business Objectives

The improvement in customer satisfaction will assist PJ Enterprises with meeting their business objectives of increasing profitability, maintaining or exceeding projected targets, and improving customer-service scores. More specifically, START aims to:

- Equip telephone operators to move from 2-3 calls per hour to 4-5 calls per hour.

- Decrease customer service complaints by 10%.
- Increase sales by a minimum of 10%.

Project Deliverables

Solution	Delivery Method	Seat Time or Pages	Description
Electronic Product	PDF	100 pages	<p>START will develop an organizational structure for the items by categories and product groups.</p> <p>START will ensure usability in terms of clickable indexing, navigation, and text-search functionality.</p>
Customer Service Training for TOs and CSSs	ILT	8 hours	START will develop small group training sessions designed to teach TOs how to use the PDF Product Reference and improve their customer service skills. A facilitator guide will be provided.

Deliverables In Scope

START will undertake the following tasks to ensure the completion of the deliverables in the aforementioned chart:

- Develop PDF Product Reference with clickable indexing and key word search functionality.
- Outlining additional information for the PDF Product Reference, if necessary.
- Develop an organizational structure for the PDF Product Reference.
- Develop training plan and instructional materials for the following customer service skills:
 - Components of a call/telephone etiquette
 - Acknowledgement/active listening

- Open-ended questions to drive conversation and ensure first-call resolution.
- De-escalating upset callers
- Resources for finding answers to unfamiliar questions
- Facilitate 5 initial training sessions.
- Provide facilitator guide to ensure supervisors have completed their training validation..
- Provide templates and files to be printed for the training sessions. For printing, see Out of Scope.

Out of Scope

START will not perform the following tasks:

- Organizing the PDF product reference.
- Updating the electronic resource when new catalog items are released every quarter.
- Copywriting the product reference.
- Scheduling shifts so that all telephone operators and customer service supervisors can attend training.
- Development of any reusable learning objects/e-learning for independent practice. When PJ Enterprises requests them, START will be happy to submit a new proposal/charter.
- Printing instructional content for use during training.
- Maintain or update training or materials after agreed upon project completion date.

Project Completion Criteria

The project is considered completed when all deliverables are signed-off by the project sponsor, the initial 5 training sessions are complete, and future PJ Enterprises trainers have completed their trainer validation.

Project Parameters

Budget

Project Budget

Deliverable /Solution	Type of Training/ Deliverable	Seat Time or Scope Figure	Total Hours Estimated	Cost
PDF Product Reference	PDF	100 pages	135 hours	\$18,630
Customer Service Training for CSSs and TOs	ILT	8 hours	400 hours	\$55,200
TOTAL			535 hours	\$73,830

Project Team Members & Roles

Team members and roles for the project

Name	Role	Responsibilities	Est. Hours Needed
Amy Law	Project Manager	Oversees project; manages project risk, change, and leads the project team to accomplish the project objectives; tracks the project and conducts regular and timely reporting to the project sponsor.	80
Sarah Ernster	Project Coordinator	Works with the project manager to schedule and track tasks for project team; maintains communications; organizes design document	43

Name	Role	Responsibilities	Est. Hours Needed
Teresa Catford	Business Analyst	Conducts task analysis; supports change management; conducts initial TO/CSS trainings	38
Tyler Shirey	Instructional Designer	Conducts Task Analysis; develops outline, objectives, and assessments; designs instructional materials; coordinates development of instruction; conducts initial trainings	287
Robert Bradford	Technical Communicator	Proofs and defines design document and PDF product reference; develops and proofs instructional materials	87
TOTAL START HOURS			535
Jane MacKenzie-Smith	Project Sponsor	Assumes role of tie-breaker; reviews deliverables; signs-off on project milestones	60
Ray Johnson, Assistant Merchandising Manager	SME	Provides information for PDF product reference; reviews product reference prototype and final version	60
Sheena Perez	SME	Reviews TO/CSS design document; reviews training	10

Name	Role	Responsibilities	Est. Hours Needed
Sarah Commons and Maria Gomez, CSS	SME, Trainers	Review training; assist in conducting trainings; teach make-up training	30 each
Rosalinda Sanchez, TO	TO new-hire, SME	TO training review	10
Paula Moore, TO	TO SME	TO training review	10

Project Milestones

Project Milestones for this project are listed below.

Milestone	Date
PDF Product Reference Prototype Sign-off	April 19, 2016
Design Document for TO/CSS Trainings Sign-off	April 19, 2016
TO/CSS Training Prototype Lesson Plans Sign-off	May 24, 2016
TO/CSS Training Pilot Test Evaluation	June 10, 2016
Final PDF Product Reference Sign-off	July 6, 2016
TO/CSS Training Revision Sign-off	July 26, 2016
TO/CSS Training Implementation	August 8, 2016

Vendor Assistance Required

No outside vendor assistance will be required to complete this project.

Possible Problems and Risks

Below are the possible problems and risks to the project.

Problem Area	Likelihood 1 – 5	Problem Owner	Possible Impact to Project	Mitigation Plan
TOs not available for training	4	PJ Enterprises	Lack of 100% training attendance will reduce company wide training effectiveness.	PJ Enterprises agreed to schedule a "make-up" training session for those employees who miss the initial training. This will be delivered by PJ Enterprises staff in training and be observed as a trainer validation by START.
Unanticipated high call volume	2	PJ Enterprises	High call volume will require TOs to remain on the phones to process orders instead of attending the training.	If there is a need for additional "make-up" training sessions, these will be delivered by PJ Enterprises staff only.
SMEs not available	2	PJ Enterprises	Delays in access to content and review information will negatively affect the project quality and timeline.	START Project Manager will provide timely communication with PJ's Project Sponsor regarding potential impacts of missing SME's on deliverables timelines; Project Sponsor and Project Manger will renegotiate deliverables timeline as necessary.
Turnover mid-training	3	PJ Enterprises	Attempting to add a new employee to a training program already in progress may result in incomplete information and unnecessary confusion.	New employees should shadow a successfully trained employee until they are able to attend the make-up training.

Problem Area	Likelihood 1 – 5	Problem Owner	Possible Impact to Project	Mitigation Plan
Training space and presentation resources are not available on the dates scheduled.	1	PJ Enterprises	Employees will not be able to be trained. Training will have to be postponed and the project may be delayed.	Project Sponsor and START Project Manger will renegotiate trainings timeline as necessary.

Assumptions

START is responsible for:

- Development of all deliverables - PDF Product Reference, training plan and instructional materials.
- Deliver 5 complete versions of the 8 hour TO/CSS training: 1st/2nd halves for AM shift staff; 1st/2nd halves for PM shift staff; mentored/guided make-up session
- Ensure accessible information in PDF Product Reference by developing new organizational structure of content and include a clickable table of contents and text-search capabilities
- Assumes project management for deliverables and provides PJ Enterprises' Project Sponsor regular status reports.
- Timely completion of the project.
- Monitoring and adhering to the project budget and schedule.
- Keeping the Project Sponsor informed of any issues that may impact the timely and successful completion of the project.

PJ is responsible for:

- Reviewing all materials, in a timely manner, to ensure that they are accurate and complete.
- Providing suitable equipment and space to deliver training as outlined in the design document.
- Working with START to determine an acceptable development and training schedule.
- Providing START with appropriate Subject Matter Experts to inform development and provide examples used in the training.
- Providing START with all necessary source materials in a timely manner, including graphic and text content for the PDF Product Reference.

- Establishing the training rollout schedule and scheduling shifts to ensure that all telephone operators and customer service supervisors are able to attend.
- All printing and assembly of course materials.
- Updating the PDF product reference after initial production and sign-off.
- Communicating additional product information not provided in the current product reference.
- Ensure the product reference is accessible on all TO and CSS workstations.

Constraints

Schedule constraints for this project include:

- TOs need to be trained and ready for the release of the third-quarter catalogue at the end of August 2016.
- Project team members have planned vacation periods within the project's time line that will be taken into account when projecting completion dates.
- The shift-work nature of the PJ Enterprises employees will affect their availability for input, reviews, and training.

Cost constraints for this project include:

- START agrees to work within an estimated budget of less than \$74,000 for all billable expenses.
- Materials production and potential overtime pay will also impact the overall budget available to this project.

Scope constraints for this project include:

- Staffing/Turnover will reduce the effectiveness of the training for the project.
- Information Services has minimal bandwidth to offer for launch and implementation of new technology resources that limits the scope of development for the electronic product guide.

External Influences/Dependencies

Increased call volume due to seasonal shifts may impact TO/CSS ability to attend scheduled trainings.

Approvals

Role	Signature	Date
