

PJ Enterprises Project Charter

March 29, 2020

Project Information: Based on previous performance and training issues, PJ Enterprises has requested a redesign of quarterly training for telephone operators and customer service supervisors. Creating new training will help PJ Enterprises to meet financial and customer satisfaction goals in addition to employee satisfaction. A gap analysis is needed to assess and ensure the training will meet the company's goals (customer satisfaction, financial and employee satisfaction).

Project Name: Customer Success Advocates Training and Job Aids

Project Sponsor: The project sponsor is Jane Smith from PJ Enterprises.

Project Owner/Manager: The project manager is John Doe from PJ Enterprises.

Stakeholders	Impact
Jane Smith, Project Sponsor	Controls the budget and signs off on plan.
Jane Smith, Tie-breaker	Final decision maker on any issues that cannot be resolved.
John Doe, Project Owner	Keeps project on task, on budget, and in scope. Drives the project forward with employees; positive presence.
Sheena Perez (SME) <i>Merchandising Manager</i>	Guides what is needed for training; identifies areas of concern or confusion.
Judie Thompson (SME) <i>Catalogs Director</i>	Guides what is needed for training; identifies areas of concern or confusion.

Version Date: March 29, 2020

Description of Work: The project team will develop a training program and supplemental materials to incentivize and support telephone operators and their supervisors.

Project Purpose: The purpose of this project is to increase customer and telephone operator satisfaction through training and employee incentive programs.

Business Objectives: Implementing the training program will help PJ Enterprises to meet these company goals:

- Focus on quality and customer service with a minimum of 10 percent improvement on customer-service scores.
- Decrease customer service complaints.
- Increase telephone operator response times from 3 to 6 per hour.
- Focus on quality of work environment and staff development and recognition.
- Increase capacity via the call system to within the 90% capacity range to enable telephone operators to reach their goals.
- Decrease disproportionate turnover.

Project Deliverables: The following items will be delivered for this project:

- Job aid(s)
- Training module
- Employee incentive program

In Scope: The following items are considered in scope for this project:

- Instructor-led training (or virtual instructor-led) that allows for role playing for the telephone operators as customers in order to improve customer service scores.
- Online job aid or product resource guide and/or template designed for consistency of product information so operators can find product information easier.
- The development of an employee incentive program.

Out of Scope: The following areas and item are considered out of scope for this project:

- Any type of new hire orientation
- Any training materials not specified above (supervisors or management, etc.)
- LMS or other training system beyond current existing conditions
- Technology and/or software upgrades that house the catalogs.

Project Completion Criteria: The project will be considered complete based on the following:

- Review the project with the team to ensure all project tasks are showing 100% complete.
- Confirm completeness with the team. The team should collaborate at this time to see if something was discussed or promised to someone but wasn't delivered yet and make it right.
- Interview the customer to make sure they accept the project as complete. Review project invoices to make sure everything has been paid. Any outstanding invoices should be discussed at this time. Having a project checklist to present at this time reiterates the work that was done in relation to this project.
- The last step is to obtain official customer signoff showing their acceptance that the project is complete. Stakeholders should be included in this communication, so they know that PJ Enterprises is happy with the solution.

Project Milestones: Project milestones and deliverable are on the following dates, based on a start date of 5/1/2020 and a launch by 9/30/2020.

Milestone	Date	Approximate Hours	Percent of Project
GAP and need analysis	5/20/2020	60	14.1%
Instructional Design	6/1/2020	70	16.3%
Lesson Plan Development	6/20/2020	35	8%
Creation of Handouts	7/1/2020	40	9.3%
Student Guide/Workbook Development	7/15/2020	45	10.5%
PowerPoint and/or other Visuals	7/30/2020	65	15.2%
Test and Exam Creation	8/20/2020	35	8%
Employee Incentive Roll Out	9/1/2020	40	9.3%
SME and Shareholder Review	9/15/2020	40	9.3%
Totals		430	100%

Note: A detailed schedule will be completed once the Design Document is created.

Risks: This table represents an assessment of possible problems and risks that could impact the project and cause delays and/or budget overages.

Risk Area	Low, Medium, or High Likelihood	Risk Owner	Project Impact - Mitigation Plan
Technology	Medium	PJ Enterprises	<p>Create a list of all technology and applications used. Compare applications to operating system to ensure they are compatible.</p> <p>Review training employees have previously received on technology. If training was inadequate, create job aids on how to use the applications or update existing.</p>
Not enough surveys completed	Medium	PJ Enterprises	<p>Invite participants to complete the surveys. All management must buy into the value of the surveys. Put in place anonymous tracking so we can identify percentage of surveys received. Target number 80% received.</p> <p>Company Intranet SharePoint can be used to create the surveys. SharePoint administrators can send daily report of percentage received to management.</p>
Interviewees withhold information	Medium	PJ Enterprises	<p>The survey integrity must ensure the surveys are anonymous. The management should back this process and advocate the survey is in place to create a skilled workforce with direct employee input.</p>
Unavailability of interviewees	Low	PJ Enterprises	<p>Ensure supervisors assign paid time to complete the surveys and interviews.</p>
Atypical behavior of those being observed	Medium	Observer	<p>Observations discretely: Observer will join call center on multiple occasions prior to employees knowing about the study to allow for complete unobstructed observation.</p> <p>Observer will sit with each employee for a two-hour period documenting</p>

Risk Area	Low, Medium, or High Likelihood	Risk Owner	Project Impact - Mitigation Plan
			environment, types of calls received, reactions to issues observed.
Incomplete reporting/documentation	Low	PJ Enterprises	Management buy in and paid time for employee to do this task.
Sickness that restricts employees from working or attending training.	Low	PJ Enterprises	Trainers will reschedule with employees when appropriate. In addition, a recording of training sessions will be made available.

Assumptions

- Content from catalogs (that is used in training) is supplied by PJ Enterprises.
- All telephone operator employees will be required to go through the training.
- There will be appropriate telephone coverage for telephone operator employees while they are engaged in ILT training.
- Telephone operator employees will be compensated for time spent training.
- The Human Resources department of PJ Enterprises will schedule and communicate training.
- The Human Resources department of PJ Enterprises will collaborate with managers on employee incentives/initiatives.

Constraints

- The need of additional staff to cover the phone operators while training.
- All training must be ADA 508 compliant.
- Project is dependent on a technology upgrade for both software and hardware.
- An unplanned change in the scope, resulting in increased time, resources and delivery timeline.

External Dependencies: The successful completion of this project may be affected by the following external factors:

- Obtaining metrics from the phone company
- Delay in the approved contract and licensing for LMS software upgrade
- Economic meltdown

Budget: The budget below is an estimate of time and dollars that will be required to complete the deliverables for PJ Enterprises.

Category	Hours	Cost Estimate
Course Development	8	\$1,568.00
Design Document	8	1,568.00
Lesson Plan Summary	8	1,568.00
Training Guide	45	8,820.00
PowerPoint and Visuals	65	11,760.00
Job Aids	40	7,840.00
Handouts	40	7,840.00
Employee Incentive Roll out	40	7,840.00
Assessments	35	6,860.00
Project Management	35	6,860.00
GAP/Analysis – Team of four Instructional Designers	60	11,760.00
Totals	385	\$74,284.00

Vendor Assistance Required: Additional vendor assistance needed on this project includes:

- Graphic designer for job aid
- Printer for printing of job aid

Project Team Members & Roles

Team 2 – Consulting Team: The table below list all the roles and high-level responsibilities and estimated hours for the Team 2 consulting team.

Name	Role	Responsibilities	Estimated Hours Needed
Maria Bagshaw	Project Manager	Manage timeline, milestones and budget with PJ enterprises team and client communications.	35
Patti Courtney	Instructional Designer	Design ILT instructional content, training and associated materials.	100
Dawn Needham	Instructional Designer	Design job aids and write scripts for scenarios.	100
Amy Koshoshek-Winkler	Technical Writer	Write scripts for scenarios. Write facilitator guide.	85

PJ Enterprises Team Members: The table below list all the roles and high-level responsibilities and estimated hours for the PJ Enterprises team.

Name	Role	Responsibilities	Estimated Hours Needed
Jane Smith	Project Sponsor	Controls the budget and signs off on plan.	60
John Doe	Project Owner	Keeps project on task, on budget, and in scope. Drives the project forward with employees; positive presence.	70
Sheena Perez	<i>Merchandising Manager (SME)/Trainer</i>	Guides what is needed for training; identifies areas of concern or confusion and trains.	80
Judie Thompson	<i>Catalogs Director (SME)/Trainer</i>	Guides what is needed for training; identifies areas of concern or confusion and trains.	80

Approvals

Role	Signature	Date
Project Sponsor		
Project Manager		