

Executive Phase Documentation

By Team 2 Enterprises

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Agenda and Meeting Minutes

Team 2 Enterprises Agenda Module 7

Module 7		Organized by: KS	Date: 8/27
Lead By	Topic	Details	Start Clock Time
Gary	Interpersonal Check-ins	Gary reports on how he is doing after hand surgery. Team supports.	5:30 (4 min)
Kurt	Defining Scope	What is scope? • Culmination agreed upon work schedules, cost, deliverable, time • Boundaries of agreed upon work to do • Listing what's covered in the project • DeFuria: Breadth of work must be performed for project deliverables	5:34 (3 min)
All	Scope Change Request Form	Talent Acquisition Requires Changes: • Schedule: Yes/ No , how: • Cost: Yes /No, how: TBD see Procurement • Scope: Yes(weak) /No, how: More work because have to do a procurement document (research, etc), Quality review (for voice talent),	5:36 (10 min)
Kurt, Katy	Procurement Documentation	1. Decide on documentation If we have to fill out the templates with vendors, then: • Purchase Order • Notice to Proceed • Show Cause Notice (justification) • Bid Request	5:46 (5 min)

		If we do not have to fill out template with vendors, then: 2. Complete documentation • Find templates • Fill Out/ Revise templates (assuming here that most we don't need to fill out)	
All	Final Document Decision	1. Quality Review 2. Scope Verification 3. Progress Report	5:51 (5 min)
All	Quality Review	Checklist: 1. Talent Requirements: • Use Quality Matter Rubric 2. Talent Performance • Could be part of a general review • Add supplementary section about talent	5:56 (10 min)
All	Scope Verification	How would talent impact...? 1. Gap Analysis: 2. Project Charter: 3. Project Portfolio Document 4. ID Document 5. Facilitator's Guide	5:56 (10 min)
All	Progress Report	Executing the Talent Recording: Assumptions, assumptions, assumptions	5:56 (10 min)
All	Action Items	Task Name Scope Change Request Forms, • Scope Change Request Letter, • Scope Change Log: <u>Gary + Katy</u> Meeting Minutes + Agenda: <u>Natalie</u> Procurement Document: <u>Kurt + Natalie</u> Other: Quality Review: <u>Katy</u> Pre Dr. C Revisions (Saturday Morning): <u>Gary (send off to Dr. C.)</u> Post Dr. C Revision (Saturday Afternoon to Sunday): <u>Katy</u> Final Edits (Sunday evening): <u>Natalie</u>	6:06 (8 min)
Kurt, Katie	Communication	Summarizes expectations and methods of communication	6:14 (3 min)

• **Questions for Dr. C:**

- Do we have to provide a script for Procurement Documentation?
- Do we make up vendors to fill out the Procurement Documentation?
- Should quality review be the whole project or just to the specific change?
- To what extent are we filling out the procurement documentation? (such as, who the contract goes to, the bidders, process, etc.)
- Second, you mentioned that the procurement document included the purchase order, notice to proceed, show cause notice and bid request. In the readings you provided and in DeFuria, I was not able to find out exactly what those documents

contained. May I ask for guidance, such as templates? (I did find [this website](#). Would it be a good model for a template?)

Meeting Minutes

Thursday 8/27		Completed By: NL
Time		
5:30	Meeting start	
5:35	Review of prior meeting's decisions	
5:40	Discuss/define scope - each team member shares their definition	
5:45	Discuss scope change request form – what will change (schedule, cost, scope)? Discuss how talent acquisition will affect scope.	
5:52	Discuss procurement documentation – are we providing templates only or filling in information?	
6:04	Decide on 4 th document we will cover: • Meeting Minutes & Agenda • Scope Change Request Form • Procurement Documentation • <u>Quality Review</u> – will this apply to overall project/training or specifically to talent acquisition?	
6:20	Delegate revisions of execution documents to team members • Meeting Minutes & Agenda: Kurt + Natalie • Scope Change Request Form: Gary + Katy • Procurement Documentation: Kurt + Natalie • Quality Review: Katy	
6:35	Meeting end	

Scope Change Request Notification

To: Ms. Jones
8/28/2020
From: Mr. Kurt Schwartz
CC: Judie Thompson / Sheena Perez

Date:

In response to Scope Change Request # 00001; initiated by Ms. Judie Thompson on 8/26/2020.

This email is to inform you on the disposition of scope change request (SCR) 00001. The change requested audio voice-over recordings be applied to the computer-based training (CBT) module which supports the upcoming telephone operator training scheduled for 9/7/2020 and 9/8/2020.

The cost to add audio to the CBT postproduction will be \$4,000.00, and **will not** impact the delivery or execution of the telephone operator training scheduled for 9/7/2020 and 9/8/2020.

The cost of \$4,000.00 was approved on 8/28/2020 by Ms. Jones. \$4,000.00 will be added to the original **DEVELOP PHASE** costing of \$50,000.00, as outlined in the Charter document. The new total of \$54,000.00 for DEVELOP PHASE pricing will be reflected in final invoicing.

The request to add voice recordings to the CBT has been approved and executed.

Sincerely,

Mr. Kurt Schwartz

Kurt Schwartz
Team 2 Enterprises Project Manager
8675-309 (Tommy Two-Tone)

Scope Change Request Form

Step 1. *Requesting official states nature of scope change required:* Requesting professional voice and audio recordings be used to support the CBT.

Requesting Official: **Judie Thompson** Signature Judie Thompson

Date 08/26/20

Step 2. *Project Manager validates that requesting official is authorized to make scope changes.*

Accept: **X** KS 8/26/20

Reject:

Validating Official: **Kurt Schwartz** Signature Kurt Schwartz

Step 3. *Estimate of cost and time to accomplish scope change:*

- Cost: + \$4,000.00 (Add audio narration/voice-over recording to CBT)
- Time: + 4 hours Impact to vendor deliverables work package and risk index
 - No impact to project completion date.

Estimate by: **Natalie Lauri**

Signature Natalie Lauri

Date 08/27/20

Step 4. *Describe the impact of scope change on the schedule end date:* Priority #2
Medium impact to project or business operations which may result in some adverse impact to revenue and/or project schedule. *(All stakeholders have been notified)*

Determination by: **Kurt Schwartz**

Signature Kurt Schwartz

Step 5. *Requesting official indicates acceptance or rejection:* (Check One.)

X Accept additional cost and schedule impacts of this change.

 Reject additional cost and schedule impacts of this change.

Authorizing Official: **Ms. Jones**

Signature Ms. Jones

Date 08/28/20

Step 6. *Project Manager changes planning and baseline documents to reflect scope change.*

- WBS
 - Schedule
 - Charter Document/Budget
 - Risk Assessment
 - User Impact Analysis
 - Implementation Study
-

Step 7. *Project Manager communicates scope change to appropriate stakeholders.*

Email notification sent to Ms. Jones, Ms. Judie Thompson, and Ms. Sheena Perez on

8/28/2020 by: Kurt Schwartz 8/28/2020 (PM)

- See enclosure 1
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Step 8. *Project Manager annotates scope change in the Scope Change Log.*

Scope Change Log (SCL) updated with SCRF 0001 on 8/29/2020

Kurt Schwartz 8/29/2020

- See enclosure 2
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Encl:

1. Scope Change Request 00001 email notification
 - The original email is posted on the shared drive- (W7) "SCRF notification"
2. Change Request Log
 - The original log entry is posted on the shared drive- (W7) "CRF Log"

Change Request Form Log

Change Request Form Log

Project Name	PJ Enterprises Customer Service/Staff Development Plan		
Requested By	Ms. Judie Thompson	Date	8/26/20
Request Number	SCRF 00001	Name of request	Professional voice-over recordings
Change Description	Need to add professional narration to the computer-based training (CBT) module.		
Change Reason	Project customer requested professional narration of the CBT in order to give the product a more polished presentation.		
Impact of change	Priority #2		
Proposed Action	Accept/Implement		
	In Review	Approved	Rejected
Status		X	
Approval Date	8/28//2020		
Approved by	Ms. Jones (Sponsor)		

Procurement Documentation

Introduction

Summary

- The purpose of this procurement document is to acquire the services of voice talent for PJ Enterprises' customer service training program.
- Team 2, as the developers of the customer service training, is seeking four professional voice actors for the computer-based portions of the training. These voice actors will provide voice-over work for a computer-based training (CBT) module.

Contents

- Procurement Products/ Work Packages
- Contracts
- Risks
- Cost
- Procurement Constraints

- Contract Approval Process
- Vendor Management
- Schedule Monitoring
- Earned Value Management
- Standardized Procurement Documentation
 - Request for Proposal
 - Contract Notice to Proceed

Procurement Service and or Goods

	Product/ Work Package Title	Description	Timeline
1	Voice talent recording	Voice actor is needed for the development of CBT audio	4 hours

Contracts

	Contract Name	Description	Reason for contract
	PJ Enterprises	Professional voice-over talent for CBT	Add narration to CBT content

Risks

	Type of Risk	Description of Risk	Risk Owner	Mitigation Plan of Impact	Likelihood
1	Priority 2	Medium impact to project or business operations	T2E	1. Have additional resources on standby 2. Communicate widely, consult widely and listen to the responses	MED

Cost

Cost Determination				
	Type of Product	Vendor/Resource	Rate / time (60 minutes)	Cost Rating (high, med, low)
1	Voice actor(s)	Voices.com	\$1,000 / hour x 1	Medium
2	Voice actor(s)	Voice123.com	\$1,800 / hour x 1	High
3	Voice actor(s)	Thevoicerealm.com	\$700 / hour x 1	Low
Average Cost			\$1,167.00 / hour	

Earned Value Management								
Time	Work Package Title	Actual Cost	Planned Value	Planned Value Data Day	Estimated Value	Cost Variance	Schedule Variance	Cost Performance Index

4 hours	Develop CBT	\$4,000	\$4,000	1.00	\$4,000	0	0	0
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Procurement Constraints

	Type	Description
	Schedule	4 hours
	Cost	\$1,000.00 / hour (for one voice actor at four hour each)
	Scope	Record narration to support the CBT module
	Resources	Audio scripts
	Technology	Microphone Sound booth Audio editing software

Contract Approval Process

- Issues request
- Review bids
- Steering committee review
- Steering committee approval
- Project Owner(s) approval
- Project Manager approval
- Contract Notice to Proceed

Vendor Management

Communications Plan				
Date	Meeting Topic	Details	Point of Contact	Progress Update
8/26/20	Scope Change Request	Team members were briefed on approved scope change request to include voice-over narration in CBT module.	Kurt Schwartz (Project Manager)	Request approved, out for bid.

Performance Metrics						
Vendor Name	Good / Service	Delivery	Documentation quality	Developmental costs	Developmental time	Cost per unit (60 min)

1 – Unsatisfactory; 2 – Acceptable; 3- Exceptional

Schedule Management				
Date	Work Package Title: <u>Develop CBT</u>	Vendor Contact	Percent Completed	Comments/Problems
Day 1				

Forms

Request for Proposal

Project Overview	This customer service/staff development training introduces telephone operators to concepts and skills that collectively combine to improve customer service and increase sales. The training will comprise of both computer-based and instructor-led training. Training videos demonstrating customer call scenarios are necessary in the development of this training. Voice actors are needed to provide voice talent to these training videos.
Project Goals	The goal of this project is to enhance the quality of customer service training videos through the use of professional voice acting.
Scope of Work	One voice actor is needed to provide voice narration to the training videos that support the CBT. The total amount of recording time will be 60 minutes. A voice talent agency (ex. Voices.com) will provide four voice actors.
Evaluation Metrics/ Criteria	Voice overs will be evaluated using the Quality Matters rubric.
Submission Requirements	

Deliverable due-date: _____ Budget: _____

Contact: Kurt Schwartz Email: _____

Request for Quote

Name:	
Company:	
Phone:	
Email:	
Good/Service Name:	
Description:	
Request date:	
Additional requirements:	
Cost of human resources:	
Cost of facility/ equipment:	
Total Cost:	

Contract Notice to Proceed

Date:	Address:
Project Name:	Project Manager:

Contractor:	Vendor:
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Dear [Contractor's Name];

Pursuant of your bid request signed on 8/28/2020, you are hereby notified to proceed with your service of providing 4 voice actors as described in the bid request. Upon receipt of this notice and per the terms and conditions that you signed, you are responsible for performing the described work: recording the provided scripts and delivering those scripts in one of the approved formats digitally. You should begin your work 8/30/2020.

Please acknowledge receipt and acceptance of this notice by signing in the space provided below.

Sincerely,

Kurt Schwartz
Project Manager

Quality Control and Review

Team 2 Enterprises decided to use the Quality Matters rubric, as it seems to best measure all the components of our blended learning approach for PJ Enterprises. We plan to use this rubric during the execution phase and throughout the duration of our project to ensure we are staying on track and meeting the goals and objectives outlined during the planning phase.

Standard		Done
General Standard 1: Course Overview and introduction		
	1.1: How to get started instructions	X
	1.2: Purpose and structure of course	X
	1.3 Telephone Operator Policies	X
	1.4: Minimum technical skills	X
	1.5: Self introduction by instructor	
	1.6: Students are asked to introduce themselves to class	
General Standard 2: Learning Objectives		
	2.1: Course-level learning objectives (measurable)	X
	2.2: Module-level learning objectives (measurable and consistent with course-level)	X
	2.3: Learning objectives written from student's perspective	X
	2.4: Instruction on how students can meet learning objectives	X
	2.5: Learning objectives appropriate for level of course	X
	3.1: Assessments measure stated objectives and are consistent with course activities and resources	X
	3.2: Grading policy is clearly stated	X

	3.3: Specific and descriptive criteria for evaluation of student work	X
	3.4: Assessments are sequenced, varied and appropriate to work being assessed	X
	3.5: Students have multiple opportunities to measure own learning progress	X
General Standard 4: Instructional Materials		
	4.1: Instructional materials contribute to achievement of learning objectives	X
	4.2: Purpose of instructional materials is explained to students	X
	4.3: All resources and materials are appropriately cited	X
	4.4: Instructional materials are current	X
	4.5: Instructional materials present a variety of perspectives	X
	4.6: Required and optional materials are clearly noted.	X
General Standard 5: Learner Interaction and Engagement		
	5.1: Learning activities promote achievement of learning objectives	X
	5.2: Learning activities provide opportunities for interaction that support active learning	X
	5.3: Instructor plan for classroom response time and feedback on assignments is clearly stated	X
	5.4: Requirements for student interactions are clearly articulated	X
General Standard 6: Course Technology		
	6.1: Tools and media support course learning objectives	X
	6.2: Tools and media support student engagement and guide student to become an active learner	X
	6.3: Navigation throughout the online components is logical and consistent	X
	6.4: Students can readily access the required technologies	X
	6.5: Course technologies are current	X
General Standard 7: Learner Support		
	7.1: Instructions or link to technical support for operators and how to access it.	X
	7.2: Explanation or link to how student/employee can get help when needed, and who to contact if they have questions.	X
General Standard 8: Accessibility		
	8.1: Course includes accessible technologies and info on how to obtain accommodation.	X
	8.2: Course contains equivalent alternatives to auditory and visual content.	X
	8.3: Course design facilitates readability and minimizes distractions	X
	8.4: Course design accommodates the use of assistive technologies, including ALT + text for photos/images and closed captioning	X

