

Team 2 Enterprises Project Charter

Project Name					
PJ Enterprises Customer Service/Staff Development Plan					
Approval Date	7/10/2020	Est. Time	Ten (10) Weeks	Last Revision	9/11/2020
Project Information					
Team 2 Enterprises will supply innovative solutions to help PJ Enterprises reach its upcoming business year goals. Team 2 Enterprises will focus their efforts on the quality of customer service and staff development.					
Business Case					
• PJ Enterprises has multiple areas of focus for improvement to reach its upcoming business goals, which includes a goal of quality service delivery. Some of the issues uncovered appear to be problem-based, such as necessary hardware / software upgrades, facility maintenance, a high employee turnover rate, and low employee morale. Others are performance-based problems that could potentially be resolved through training and education, such as product knowledge, telephone etiquette, and product sales. • Despite growth and profits, performance deficiencies within the telephone operator and customer service departments are negatively impacting customer relations, and future sales. • Team 2 Enterprises will focus their efforts on designing, developing, and delivering a training program that focuses on improving the quality of customer service and staff development.					
Business Objective		Completion Criteria		Deliverables	
• Focus on quality and customer service. • Improve customer service scores by 10 percent. • Increase product sales. • Reduce employee turnover.		• Execution of two training sessions to be conducted on site. • Delivery of five (5) copies of the training materials, and the Facilitator Guide (FG). • Delivery of a screening guide for HR (Human Resources). • Full implementation of quality standards. (Quality Matters rubric, used throughout the entire process)		• Training for all current telephone operators, which includes computer-based training (CBT), instructor lead training (ILT), job aids/ quick reference guide (QRG) and mentoring during training. • Facilitator Guide. • Interview screening guide (ISG) for HR (Human Resources) recruitment. • All deliverables will be developed using quality standards, such as Quality Matters.	
In Scope				Out of Scope	
• Training Related: Training the telephone operators on customer service and telephone etiquette.				• Training supervisors and upgrading the phone systems or software database.	

• Non-Training Related: Supporting HR to improve the operator recruitment process.					
Risks					
Phase	Likelihood	Risk Owner		Mitigation Plan of Impact	
Analyze	Medium	Judie/Sheena availability		Backup SMEs (4 supervisors we can use)	
Design	Medium	Judie/Sheena		Backup SMEs (Subject Matter Experts) (4 supervisors we can use)	
Development	Medium	Judie/Sheena		Backup SMEs (4 supervisors we can use)	
Implementation	Low	Telephone Operator scheduling issues.		Supply paid time (2 hours) before or after the start of the shift to complete training	
Evaluate	Low	SMEs and Telephone Operators not completing the survey.		Supply incentives for survey completion and score improvement.	
Assumptions				Constraints	
• SMEs will be available to the design team. • Project owner (Point of contact, and an alternate for decision making) will be available. • Sufficient time and space will be given to complete the training. • Vendor will complete deliverables on time.				• Training must follow the Americans with Disabilities Act (ADA/508 compliant). • Time availability for PJ Enterprises employees. • Instructor availability. • Budget constraints.	
External Dependencies			Vendor Assistance		
• Employee participation. • Training environment: • Classroom (space to conduct the training) w/ individual workstations that will support computer-based training and face-to-face instruction and mentoring. • Vendor deliverables			Printing of the following materials: • Facilitator’s Guide (FG). • Quick Reference Guide (QRG). • Interview Screening Guide (ISG) for HR.		
Project Leaders			Stakeholders		
Project Role	Name	Business Role	Name	Role	
Project Sponsor	Ms. Jones	VP Marketing	Sheena Perez	Merchandising manager	SME (1)
Project Manager	Team 2 Enterprises (Kurt Schwartz)	Consultant	Judie Thompson	Catalog director	SME (1)
			Ms. Jones	VP Marketing	(1)
Project Owner	Judie Thompson	Catalog Director	Various	Customer-service supervisors	(4)

			Various	Telephone Operators	(25)
Milestones					
Phase		Status	Deadline	Cost	Completion
(Analyze) Meeting with SMEs and HR leadership to decide requirements.		Completed	7/14/2020	\$6,000.00	7/13/2020
(Design) Training Solutions – storyboard, QRG outline, etc.		Completed	8/25/2020	\$20,000.00	8/23/2020
(Design) Work with HR and recruitment to create a streamlined process for employee interviews.		Completed	8/14/2020	\$3,000.00	8/12/2020
(Develop) Creating CBT, Job Aids, QRGs, and work with vendors to build FG.		Completed	8/30/2020	\$50,000.00 + \$4,000.00	9/3/2020 (2 additional days to add narration to the CBT)
				\$54,000.00	
		\$4,000.00 added for audio narration of CBT (Computer Based Training), was approved by Ms. Jones on 8/28/20 Ms. Jones			
(Implement) Launching CBT, Job Aids/QRGs, manual.		Completed	8/31/2020	\$8,000.00	8/30/2020
(Evaluate) Assessing customer service scores and call volume increases. Send follow-up surveys to phone operators after completion.		Initiated	9/11/2020	\$2,000.00	
FINAL COST				\$93,000.00	
Approvals					
Name		Role	Date	Signature	
Judie Thompson		Catalog Director	7/8/2020	Judie Thompson	
Sheena Perez		Merchandising Manager	7/9/2020	Sheena Perez	
Ms. Jones		VP Marketing	7/10/2020	Ms. Jones	