

Project Charter for Team #3: Instructional Design Solutions

November 15th, 2015

Project Information

Project Name and Description

The purpose of this project is to design, develop, and deliver a training that is to be completed by customer service supervisors and operators prior to an upcoming catalog mailing. This face-to-face training program will replace a prior instructor led training program, which was designed and delivered by one of the individuals who will serve as a subject matter expert for this project. A \$400,000 budget has been set for the project, with an end goal of increasing sales. PJE goals include a net profit increase of \$2 million that will require aggressive growth, primarily through a focus on work environment, staff development, and customer service. Phase one of this project was an extensive front-end analysis that incorporated qualitative and quantitative research. Training has been deemed to be an appropriate solution to some of the needs assessed; therefore, ID Solutions will work with appropriate stakeholders, including SMEs, to develop, design, and implement a training program. Following implementation, ID Solutions will evaluate the training solution, seek client feedback, re-assess needs and revise as appropriate.

Project Manager

The Project Manager for Instructional Design Solutions is Kim Myers. She has been in contact with Jane MacKenzie from the start and both have worked together to assess the aspects of the project.

Project Sponsor

The Project Sponsor for PJ Enterprises is Jane MacKenzie, Director of Sales Support.

Stakeholders and Impact

| Stakeholder | Responsibilities | Impact |
|------------------------------------|---|---|
| Jane MacKenzie, Project Sponsor | Serve as point person, answer IDS questions, provide PJE staff support, review and sign off on all documents. | Success of this project allows Jane to meet the project assigned to her by VP of sales. Improved customer satisfaction could increase sales, which could increase sales and need for sales support staff. |

| Stakeholder | Responsibilities | Impact |
|--|--|---|
| Jane MacKenzie, Tie-breaker | Jane will make decisions, both strategic and content, should SMEs disagree. | Success of this project allows Jane to meet the project assigned to her by VP of sales. Improved customer satisfaction could increase sales, which could increase sales and need for sales support staff. |
| Sheena Perez, Reviewer and Subject Matter Expert | Provide product guide subject matter. | Success of this project will reduce Sheena's workload long-term, allowing her to focus on areas beyond training. |
| Bruce Bennett and Yun Tsien, Additional Subject Matter Experts | Provide tech-related subject matter as it pertains to the catalog launch training as well as integration of product guide with current and pending ordering systems. | Success of this project hinges upon the involvement of Bruce and his team. Seamless integration of information and the ordering system is necessary for the training to be successful. |
| Project Team Members: Bo Yang, Project Coordinator Cassandra Dority, Tech Writer Matthew Oaldon, Instructional Designer Kim Myers, Project Manager | Oversee analysis, design, development, implementation, and assessment of catalog implementation training. | Successful completion of the project will fulfill IDS contractual obligations. |
| Ray Johnson, Assistant Merchandising Manager | Provide product guide and subject matter and review of materials. | With Sheena's limited time, Ray will be able to work with team for the necessary material information |
| Sarah Commons and Maria Gomez, Customer Service Supervisors | SMEs, reviewers, training assistance and train the trainer candidates for the future. | Provide the opinions from supervisors' perspective. Long-term trainer for the future once ID has completed the contract. |

| Stakeholder | Responsibilities | Impact |
|--|---|--|
| Paula Moore and Rosalinda Sanchez, Telephone Operators | SMEs to assist with TO perspective. May assist in reviewing some of the training for input. | Provide the opinions from the front line employees with different expectation due to their experience. |

Description of Work

Project Purpose

ID Solutions will create a template for a training module for the launch of new products and catalogs to assist TOs in becoming better-informed about products and quicker response the telephone orders.

Business Objectives

The primary goal of this project is to improve customer service scores by 10%. This includes an improvement in operator product knowledge, customer wait time, calls taken per hour, and the overall customer experience. Better informed TOs will be able to respond to telephone orders more efficiently, which helps PJ Enterprises achieve objectives of 10 percent improvement on customer-service scores and eventually maintain aggressive growth up to \$7 million in annual sales.

Project Deliverables

Instructional Design Solutions will deliver the following solutions to PJ Enterprises:

| Solution | Seat Time or Pages | Description |
|-------------------------|---|--|
| Product Guide Database | Large database with an information page for each product in the catalog | Create a comprehensive product database including all necessary product information including powerful search capability, the ability to add, modify or delete data, make queries/reports, and create automatic backups. The database team will review the program with PJE IT for hand-off. |
| Catalog Launch Training | 4-6 hours of Instructor-Led Training | We will assess the current training for operators to develop a consistent instructor-led training program for PJE that includes a discussion of new products and how to effectively use the full product guide. In addition, we will create a Participant Guide that will include job aids for navigating the system. |

| | | |
|---------------------------|------------------|---|
| | | <p>The training will be highly interactive, providing numerous opportunities for demonstration, practice, scenarios, assessments and quizzes.</p> <p>The training will also include facilitator guides and frameworks for adding catalog items in the future.</p> |
| Customer Service Training | 2-3 hours of ILT | <p>We will create a comprehensive training that can be reused as needed as a separate program; allowing PJE to include it and/or use as needed separate from the product launch training, and use in orientation.</p> <p>The training will be interactive with role playing, scenarios, and assessments. It will include basic customer service, telephone etiquette, and how to handle common customer concerns.</p> <p>The training will include a facilitator guide, participant handouts, and train the trainer reference guides.</p> |

Work In Scope

ID Solutions team will be responsible for the following tasks to complete the above deliverables:

- Conduct additional analyses on the previous training and training materials to determine how to redesign the new training; submit this to SMEs for review and finalize.
- Create a 5 hour new catalog launch training guide; submit for review, make changes and obtain signoff.
- Write a 3 hour customer service training module, submit for review, make changes and obtain sign-off.
- Write an instructor's guide and participant's guide; submit for review and make changes.
- Create a product database with an easy search function; submit for review and make changes.
- Deliver two day and evening training sessions and one make-up session.
- Conduct the evaluation plan for the training.
- Report the project status to all stakeholders.

Out of Scope

ID Solutions team is not responsible for determining policy and standard changes for PJ Enterprise under this contract. Should PJ Enterprises require our services, we will submit a separate proposal for that work.

ID Solutions is also not responsible for:

- Updating the order entry system to embed the product information.
- Ensuring that SMEs provide reviews in a timely manner.
- Providing a training room of appropriate size and accommodation for the class.
- Printing the training materials.
- Scheduling training time and notifying staff and ensuring their attendance.
- Providing an HDMI-capable projector with full screen for learners to follow along during training.
- All communication with PJE employees.
- Scheduling, session sign-up, and completion tracking.
- Providing Internet access for the training.
- Networked computers or laptops for use by each person who attends the session (one per attendee).
- Drinks and snacks for participants.
- Lunch or evening meals and drinks for participants.
- The method of tracking student completion as needed for PJE records.

Project Completion Criteria

The following criteria will help all stakeholders to see when the project is complete:

- The database is created for data input and can be used for the training purpose.
- The training is conducted twice on January 20th and 21st and a make-up session if needed at the beginning of February.
- The project evaluation is conducted.

Project Parameters

Budget

The budget below is an estimate of time and dollars that will be required to complete all the deliverables for PJ Enterprises. These numbers are an estimate; therefore, the cost could vary by 10% either way.

| Deliverable /Solution | Type of Training/ Deliverable | Seat Time or Scope Figure | Total Hours Estimated | Cost |
|------------------------------|---|--|------------------------------|---------------------------|
| Product Guide Database | Electronic data management system including the capability to persist, update and retrieve product information | Development time@\$150/hr Plus server integration | 352 | \$60,000 |
| Catalog Launch Training | Instructor led Training: Day and evening sessions on consecutive days and one make-up session the following week. Course Development: electronic document Participant and facilitator guides: paper documents | 5, 4-6 hour sessions | 172 -258 | \$16,000 - \$24,000 |
| Customer Service Training | Course Development: electronic document Facilitator reference guide, participant guide, and Participant handouts: paper documents | 5, 2-3 hour sessions | 86 - 129 | \$8,000 - \$12,000 |
| Training Total | | 5, 6-9 hour sessions | 258 - 387 | \$24,000 - \$36,000 |
| GRAND TOTAL | \$84,000 - \$96,000 | | | |

Project Team Members & Roles

The table below lists all team members working on this project, their high-level responsibilities and the hours required for their participation.

| Name | Role | Responsibilities | Est. Hours Needed |
|--|------------------------|---|-------------------|
| Kim Myers | Project Manager | Manage the projects from inception to completion; provide tracking and reporting of all tasks and budgets to client; maintain all communications with stakeholders | 58 |
| Bo Yang | Project Coordinator | Track and schedule all tasks and communicate them to the team | 23 |
| Matthew Oaldon | Instructional Designer | Create all instructional materials and conduct all training sessions | 193 |
| Cassandra Dority | Technical Writer | Write and update all training materials and necessary supplemental training materials | 81 |
| Kim Myers, Bo Yang, Matthew Oaldon, Cassandra Dority | Business Analysts | Conduct research to ensure the training solution meets the business needs of PJE | 8 each = 32 |
| TOTAL HOURS BY IDS | | | 387 Max |
| Dave Developer | Database Developer | Build a database for the product guide including a template so future products can be entered easily; collaborate with PJE Information Systems and coordinate activities with Kim Myers | 176 |

| Name | Role | Responsibilities | Est. Hours Needed |
|--|--|--|--------------------------|
| Ann Administrator | Database Administrator | Identify database requirements and recommend solutions for the physical components and functionality including search capability, the ability to add, modify or delete data, make queries/reports, and create automatic backups; provide assistance to Dave. | 176 |
| Total Hours by Database Solutions LLC: | | | 352 |
| Jane MacKenzie | Project Sponsor | Serve as point person, answer IDS questions, review and provides final sign off on all documents. | 80 |
| Sheena Perez, Merchandising Manager & Ray Johnson, Assistant Merchandising Manager | Product Guide Subject Matter Experts and Reviewers | Provide input to final research; review all documents for accuracy | 100 total |
| Bruce Bennett, Vice President of Information Systems and Yun Tsien, Manager of New Sales Installation System | Technical Subject Matter Experts | Provide technical support and coordinate integration of product database | 80 |
| Sarah Commons & Maria Gomez, Customer Service Supervisors | Product Guide & facilitator guide Reviewers; assist in conducting the training | Provide input from a supervisor's perspective for facilitator training guide and training. | 97 total |

| Name | Role | Responsibilities | Est. Hours Needed |
|--|-------------|--|--------------------------|
| Paula Moore & Rosalinda Sanchez, Telephone Operators | Reviewers | Provide input from an operator's perspective for product guide training. | 52 total |

Project Milestones

Subject to agreement from PJ Enterprises management, Instructional Design Solutions will provide the deliverables on the following dates:

| Milestone | Date |
|-------------------------------------|------------------------------|
| Database Design | 12/4/2016 |
| Catalog Launch Training | 1/20/16, 1/21/16, and 2/2/16 |
| Design Document | 12/4/2015 |
| Prototype of Product Guide Database | 12/11/2015 |
| Develop Training | 12/18/2015 |
| Develop Product Guide Database | 1/2/2016 |
| Evaluate and Revise | 2/9/2016 |

Vendor Assistance Required

Instructional Design Solutions will require the assistance of an outside vendor to build the product guide database. Instructional Design Solutions will sub-contract Database Solutions LLC to develop the database. Instructional Design Solutions has worked with Database Solutions LLC on several successful projects and thus has an excellent relationship with them.

Instructional Design Solutions accepts all responsibility for the work performed by Database Solutions LLC. The database developer from Database Solutions, Dave Developer, will work together with Bruce Bennett under the supervision of Kim Myers to ensure there is a seamless transition of the database into your current network.

Possible Problems

| Problem Area | Likelihood 1 – 5 | Problem Owner | Project Impact | Mitigation Plan |
|--------------------------------|-----------------------------|--------------------------------|---|---|
| Lack of Motivation /Incentives | 4 | Jane MacKenzie | Would discourage operators from attending the training sessions, which will limit the transfer of knowledge and will ultimately prevent PJE from attaining it goal of 10% improvement in customer service scores. | Ensure that operators and supervisors participating in the training are paid their regular hourly rate or are compensated adequately. |
| Lack of support from IT | 3 | Bruce Bennett & Jane MacKenzie | Would slow down the integration of the database. | Ensure that IT is on-board and aware of the significance of this project and ensure that the timeline of this project does not overlap with installation of the new order answering system. |

| Problem Area | Likelihood 1 – 5 | Problem Owner | Project Impact | Mitigation Plan |
|-------------------------------|-----------------------------|--|--|---|
| Availability of SMEs | 2 | Jane MacKenzie | Could slow the project if SMEs are not available, thus making it more difficult to comply with deadlines and stay within budget | Measures have already been put in place to mitigate this by having more SMEs available for the project. However, the importance of feedback cannot be underestimated. |
| Projects running concurrently | 3 | Jane MacKenzie, Bruce Bennett, Dave Developer, and Kim Myers | If changes occur while the database is being developed, especially to the user interface or navigation, it would delay the completion of the product guide training because of rework. | Don't start development on the product guide training until the planning stage is complete for the database. |

Assumptions

Instructional Design Solutions is responsible for:

- All stated deliverables.
- Project Management for the development of the database and training, and guides with regular status updates with the project sponsor.
- Meeting deadlines and delivering quality solutions.
- Timely completion of the project.
- Monitoring and adhering to the project budget and schedule.
- Providing JP Enterprises with training documents that can be printed and delivered to trainees.
- If applicable, scheduling inexpensive and timely travel.

PJ Enterprises is responsible for:

- Working with Kim Myers to determine an acceptable development and training schedule.
- Providing Subject Matter Experts with expertise in supervision, taking calls and interacting with customers, database integration and for each to provide input and review all deliverables.
- Provide IT support as needed to ensure the database server is properly networked to all operator stations.
- Help manage the scope of the project to ensure deadlines are met and the project stays within budget.
- Providing adequate time for operators to attend training sessions.
- Ensuring operators are paid for attending the training.
- Providing Instructional Design Solutions equipment that will enable them to successfully conduct the training. Equipment is defined as HDMI-capable projector with full screen, an internet connection, and one networked computer per student.
- Providing all necessary source materials.
- Providing communication with PJE employees including enough notice to prepare for the training.
- Scheduling, session sign-up, and completion tracking.
- Drinks and snacks for participants.
- Lunch or evening meals and drinks for participants.
- A training room of appropriate size and accommodations for the class.
- Printing for all course material.
- The method of tracking student completion as needed for PJE records.

Constraints

The following situations could prevent instructional Design Solutions and its partners and staff from their ability to complete the project within scope:

- The nature of shift-work and high turnover may affect the ability of operators to attend training sessions if there is not enough staff to cover shifts.
- Staffing limits may impact the availability of primary and secondary SMEs and create challenges in consistency of viewpoints that require time to resolve.
- The availability of Sheena Perez and other SMEs on a regular basis.
- Availability of Bruce Bennett or IT to resolve any technical issues in a timely manner.

External Influences/Dependencies

External factors that may hinder the successful completion of this include:

- Any factors relating to the business partnership with or commitment of Database Solutions LLC.
- Unseasonably large amounts of snowfall on the days of the training may impact attendance or prevent caterers from delivering lunch.
- Weather issues that cause power failures and the network to crash during training.
- Bandwidth or other issues that slow computer speed during training.

Approvals

| Role | Signature | Date |
|-----------------|-----------|-------|
| Project Manager | <hr/> | <hr/> |
| Project Sponsor | <hr/> | <hr/> |