Reviving PJ Enterprises

by

Fourward Instructional Design, Incorporated

September, 13, 2018

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Reviving PJ Enterprise

By Fourward Instructional Design, Inc.

Project Description - PJ Enterprises has contracted Fourward Instructional Design, Inc. to conduct a full-scale gap analysis in order to identify solutions that will allow the organization to a) reach their revenue goals b) increase customer satisfaction and c) improve the work environment/culture. The gap analysis may reveal one or many areas that need improvement in the corporation. Fourward ID, Inc. will report on all of the issues that were discovered as a result of the gap analysis, regardless of whether they are related to Learning & Development. While Fourward ID, Inc. may not have the expertise to address all of the issues PJ experiences, those that involve training and onboarding solutions will be addressed by our company. Once the appropriate solution has been determined, Fourward will design and develop a plan for PJ Enterprises to execute. Our goal is to come up with a comprehensive plan agreed upon by all parties.

Project Gap Analysis Strategy

Information Needed

- Culture of the company and of actual call center (employee/employee relationships, employee/manager relationships)
- Attitudes of employees at each organizational level, common frustrations
- Routines, processes and protocols for operators and managers - preparation for shifts (huddles, etc), individual calls, routing of complaints and issues
- Current training material/process for call center operators
    - The experience of attending a training on catalogue/new products (if possible)
- Information about what phone system is currently used.
    - When and why was it chosen?

- ○ Any technical issues with this phone system? System dysfunction or user error?
- ○ Is it fully understood by the employees - operators as well as customer service managers?

Team Strategy

We will examine the customer response surveys and the current training material. We will also interview operators and managers to get their feedback on a number of issues (training, attitude, response rate, customer feedback, perceived issues with the phone system or process, solicit suggestions from the operators regarding what they think would make their job technically easier, etc).

It would also be helpful to interview Sheena Perez, to see how she went about creating the current training and why she made the decisions she made. Getting insight from her could help pinpoint where specific root issues may be. By interviewing the HR director, we could gain insight into hiring practices and qualities they look for in potential candidates. If needed or determined more beneficial based on company culture, we may also send out an anonymous survey via SurveyMonkey so employees do not feel put on the spot answering questions in person.

Last, a procedural analysis would be very revealing. That would entail spending a day or two (or more if possible) on the floor with the operators, listening, observing interactions between employees, customers and any training we can attend.

Analysis Plan

Activity/Method	Purpose or Information You Hope to Gain	Person Responsible
Interview operators	Hope to gain more insight into what their job is like. What their opinion is about the culture of the call center. What types of	Each individual operator

	things could be causing the customer complaints. Ask them to describe the process they experience in handling customer calls.	
Interview Managers	Find out what their relationship is like with the operators. Find out the opinion of the culture. Find out their opinion about their training and training for operators. What could be causing customer complaints.	Individual Managers
Interview Sheena Perez	Find out how she developed the training for operators. What drove the decision making for the training. Is money an issue for developing proper training? Her thoughts on the rise of customer complaints.	Sheena Perez
Interview HR Director	Find out about hiring practices. What are the qualities of the ideal candidate. Opinions on the high turnover rate.	HR Director
Procedural Analysis	Spend a day/morning or as long as needed, observing the operators, managers and listen in on some calls. Take detailed notes on what is seen and heard. Also include how the managers operate and interact. If possible, sit in on a new product training session.	Individual operators and the managers
Training Materials /Process Review	Understand as deeply as possible what the process is like for operators acquiring product knowledge	Sheena Perez/HR Director

Questions to Ask: [Operators]

- Customer complaints have gone up 30% in the past year. Why do you believe that is?
- What can you tell me about the training your received on new products?
- From your perspective, what is the general attitude or mood among your fellow operators?
- Is there anything that keeps you from doing your best at your job? Any roadblocks that you experience in your role? Are there any issues with the actual phone system?
- Have you used phone systems in other companies that have been easier to use?
    - (If they say it's cumbersome) What would make the phone system better so that you could do your job more effectively?
- Describe the average customer you talk with on calls in three adjectives.
- What do you enjoy about your job? What do you dislike?
- What do you think would make your job more rewarding?
- What do you feel you struggle with the most in your role?
- Do you feel valued? Do you feel your ideas and hard work are appreciated?
- If you could change one thing that would make the company more successful, what would it be?

Questions to Ask: [Managers]

- Customer complaints have gone up 30% in the past year. Why do you believe that is?
- Do you believe that you receive adequate training on new products? Do operators? Please explain.
- How do you handle customer complaints about operators?

- What is the current protocol for remediating operators with inadequate product knowledge?
- From your perspective, what is the general attitude or mood of operators toward their job?
- Is there anything that keeps you from doing your best at your job? Any roadblocks?
- If you could change one thing that would make the company more successful, what would it be?
- If money and time were no issue, what would you need to make this call center the best it could be? (Encourage them to think big and out of the box).
- What do you think about the actual phone system? Were you in on the purchase decision and if so why did you choose this one?
- Do you think the phone system is inhibiting or helping your operators?
- Do you feel the operators are proficient at their job? If not what training may help them?

Questions to Ask: [Sheena Perez]

- Customer complaints have gone up 30% in the past year. Why do you believe that is?
- How did you (or someone else) determine appropriate new product training for operators?
- What parts of the training process do you think are successful as they stand, and what areas do you think need improvement?
- If money were not an issue, what changes, if any, would you make to the training process?

Roadblocks & Dependencies

- There could be concerns with employees being honest. They may be concerned that they will be punished for being honest.

- Employees may not have any idea why there are problems. They may not understand why there is a problem, possibly placing blame on the customer.
- Sheena may feel like her training material is being attacked and become defensive.

Strategies to Mitigate Risks

- We must reinforce that these interviews are private and specific identities will not be revealed. To address this, we will also provide a survey option for those who wish to remain anonymous but still provide feedback via SurveyMonkey instead.

- We must show the customer response data to ensure that employees realize there is an issue. We could show targets and how negative responses translate to a loss of business.

- We should applaud Sheena for the current success, but explain to her that there may be other ways to create training. We could also determine (through interviews) that there are outside factors that determine the creation of training material. Let her know that we are not here to attack anyone. As our questions note, if training materials and methods were indeed not up to her, we will inquire about what areas she thinks the training could improve, and what she would do differently if given the opportunity.

Project Charter for Fourward Instructional Design (Team 2)

Due: July 30, 2018

Team Members: Julie Cabaniss, Chelsey Geiseler, Michael Marolla, Rebecca Schweitzer

Project Information: The ultimate goal of this project is to help PJ Enterprise, Inc. improve their customer service to the point where customers give mostly positive feedback about their experience, return to buy more merchandise from the company and also promote the company to their friends which will help to grow the customer base.

Project Name: Reviving PJ Enterprises

Project Sponsor: PJ Enterprise VP, Haley Smith

Project Owner: HR Director, Ted Stevens

Stakeholders & Impacts

Stakeholder	**Impact**
Project sponsor Vice President of PJ Enterprises	Overseeing project from afar
Project Owner: HR Director	Making sure all aspects follow company guidelines
Tie-breaker	
Reviewers L&D Manager and Sheena Perez (merchandising manager),	Very involved. The operators performance is a direct reflection of her leadership and training.
Subject matter experts (if other than reviewers). Judie Thompson (catalogue director), Customer Service Supervisors, Operators.	Very involved. They will be providing the details that will aid in the creation of effective training material.
Project Team Members	Team members do most if not all of the project detail work.

Version Date July 30, 2018

Description of Work:

Fourward Instructional Design will conduct an analysis of the processes, perceptions and problems currently facing PJ Enterprises regarding their customer service. Based upon interviews with customer service professionals, managers and other stakeholders as well as a review of data and a procedural analysis, Fourward Instructional Design will summarize their findings and recommendations to JP Enterprises. Where appropriate, Fourward ID will then design, prepare and facilitate training to address any issue(s) that require such a solution.

Project Purpose:

The purpose of this project is to give employees the tools they need to succeed in customer interactions, which will positively affect the two areas targeted for improvement and growth -- customer service quality and increased revenue. We believe that given better job aids, reference material and training, the issues in customer service will diminish and operators will be able to better serve the customers, resulting in more repeat business and growth in the customer base.

Business Objectives:

- To raise customer satisfaction rate
- To grow profits
- Meet all business goals for the year

Project Deliverables: only the in scope items.

1. New Product and Customer Service Training
2. Operator Manual
3. Product Reference Database Training

Out of Scope:

1. Job quality and satisfaction may be out of line with top performing companies in this industry.

There may be some human resource and cultural issues at JR Enterprises that could be addressed to make the operator jobs more satisfying and reduce turnover. In addition, some of these factors may help JR Enterprises attract employees that are more committed to the company and their work. Some factors to investigate might include the following:

- Is operator and manager pay level competitive with top companies in the same industry?
- Why are operators not paid to attend training? Not paying employees for the time they spend in training sends a message that their time is not respected *and* the training is not important. And this is done when they are *onboarding* - their first exposure to the company culture.
- Are employees encouraged to talk with each other and managers about difficulties they experience in a way that makes them feel safe and as though they are part of a problem solving team?
- Paradigm Shift: Since the success of the company depends upon repeat customers and growing the customer base (some of which will be done through word of mouth from other customers), the employees interacting directly with the customer (the operators) need to be cherished and nurtured by the company. They will make or break the future of the client base.

2. Current ordering system is not aligned with technology and consumer buying trends. Some factors to investigate might include:

- When considering long-term growth, does the lack of an operable online presence for browsing products and direct-to-consumer orders position PJ Enterprises at a disadvantage?
- Although many loyal older customers may want to continue receiving and ordering via a catalogue, the next generation of consumers aging into the target demographic will be unlikely to want to use an ordering system that is perceived as inconvenient and more time consuming than necessary compared to options provided by competitors in the space (boutiques/specialty gift, big-box retail, online).

Project Completion Criteria

This project will be accepted once the trainings have translated into effective operator customer service. This will be determined within four weeks of the training completion. Customer surveys, order processing data and operator feedback will be gathered and reported to the Project Sponsor. At that time, if changes need to be made to reach desired goals, they will be made then.

Project Milestones

The milestones below are based upon using a combination of the ADDIE and Agile models for instructional design.

Milestone	Date
(Analysis/Design) - Fourward will **deliver a basic outline of structure/topics covered** for new training for Owner/Sponsor sign off by...	1 month.
(Development) - Fourward will **deliver a first draft skeleton** of facilitator's guide for training for feedback and review based on agreed-upon outline by...	6 weeks
(Iterative Development) - Fourward will **deliver a revised skeleton based on edits** from Sponsor/Owner	1 week
(Development) - Fourward will **deliver a first full draft of the facilitator's guide**, including all supporting materials for review by...	6 weeks
(Iterative Development) - Fourward will submit a **revised full draft of guide** based on edits from Sponsor/Owner by...	2 weeks
(Final Development) - Fourward will submit a **final draft of guide** based on edits from Sponsor/Owner by...	1 week
(Implementation) - **Projected date for New Product/Customer Service training** in-person, mandatory (paid), to be held on...	Training date 1 month from completion and acceptance of the final draft
(Evaluation) - **post-training employee feedback surveys will be administered** at the end of the training on...	same day as above
(Iterative Development) **Updates to training deliverables -** any minor 'tweaks' needed based on employee feedback and customer service data.	4 weeks after training.

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

Risk Register

Risk Area	Low, Medium, or High Likelihood	Risk Owner	Project Impact-Mitigation Plan
Change in leadership	medium	Upper management of PJ Enterprise	
Employee buy in	medium	Project Sponsor and upper management of PJ Enterprise	
Leadership buy in	medium	Project Sponsor and upper management of PJ Enterprise	

Assumptions

- As agreed upon with leadership, employees will be given a day off work duties and paid for the training
- The training will be mandatory under the circumstances above
- PJ will provide a space for the training that includes a projector and white board and enough seating and table space for all employees to attend and participate.

Constraints:

- Based on communication from leadership, the phone system will continue to be used as the main system for orders to be placed
- New product database is being installed

External Dependencies

Budget

Category	Cost/Hours Estimate
Procedural Analysis and report	2 Weeks (80 hours) @ $65/hr = $5,200
Digital Data Analysis (customer feedback, customer surveys, customer attrition, etc..) and report.	3 Weeks (120 hrs) @ $65/hr = $7,800
Interviews with stakeholders and report	2 Weeks (80 hrs) @ $65/hr = $5,200
Development of basic outline and structure of topics to be covered in training.	4 Weeks (160 hrs) @ $65/hr = $10,400
Skeletal Draft	6 Weeks (240 hrs) @ $65/hr = $15,600
Revised skeletal draft	1 Week = $2,600
First full draft of Facilitator’s Guide	6 Weeks = $15,600

Revised draft of Facilitator's Guide	2 Weeks = $5,200
Final draft of Facilitator's guide	2 Weeks = $5,200
Implementation Training preparation, (with all teaching aids ready to go)	4 Weeks = $10,400
Update of training deliverables	2 Weeks - $5,200

Vendor Assistance Required

Project Team Members & Roles

Name	**Role**	**Responsibilities**	**Est. Time Investment**
CustomerData Software Company	Install product software system.	Product system needs to be functional and management and representative from Fourward ID need to be trained on the software.	To be done before the project begins or at least within a week after the project begins.
ProPrint Inc.	Printing of Training materials.	Will print final version of professional training materials.	1 Week

Approvals

Role	Signature	Date
Project Sponsor		
Project Manager		

SCOPE MANAGEMENT PLAN

REVIVING PJ ENTERPRISE

FOURWARD INSTRUCTIONAL DESIGN, INC.
123 FAKE STREET
PHILADELPHIA, PA 19148

8/4/18

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Introduction

The Scope Management Plan provides the scope framework for this project. This plan documents the scope management approach; roles and responsibilities as they pertain to project scope; scope definition; verification and control measures; scope change control; and the project's work breakdown structure. Any project communication which pertains to the project's scope should adhere to this Scope Management Plan.

The ultimate goal of this project is to help PJ Enterprise, Inc. improve their customer service to the point where customers give mostly positive feedback about their experience, return to buy more merchandise from the company and also promote the company to their friends which will help to grow the customer base. To reach this goal, Fourward Instructional Design, Inc. will provide the following services and deliverables:

- New Product and Customer Service Training
- Operator Manual
- Product Reference Database Training

External resources needed for this project will include printing services for some of the training and manual items. It is also assumed that the third party product software vendor will have the new product database up and running by the time our work begins.

Scope Management Approach

For this project, scope management will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Project Manager, Sponsor and Stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements. Proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Manager will submit the scope change request to the Change Control Board and Project Sponsor for acceptance. Upon approval of scope changes by the Change Control Board and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

Roles and Responsibilities

The Project Manager, Sponsor and team will all play key roles in managing the scope of this project. As such, the project sponsor, manager, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope throughout the entire duration of the project. The table below defines the roles and responsibilities for the scope management of this project.

Name	Role	Responsibilities
Sara Drake	Sponsor	- Approve or deny scope change requests as appropriate - Evaluate need for scope change requests - Accept project deliverables
Michael Marolla	Project Manager	- Measure and verify project scope - Facilitate scope change requests - Facilitate impact assessments of scope change requests - Organize and facilitate scheduled change control meetings - Communicate outcomes of scope change requests - Update project documents upon approval of all scope changes
Julie Cabaniss	Technical Team Lead	- Measure and verify project scope - Validate scope change requests - Participate in impact assessments of scope change requests - Communicate outcomes of scope change requests to team - Facilitate team level change review process
Rebecca Schweitzer	Team Member	- Participate in defining change resolutions - Evaluate the need for scope changes and communicate them to the project manager as necessary
Chelsey Girseler	Team Member	- Participate in defining change resolutions - Evaluate the need for scope changes and communicate them to the project manager as necessary

Table 1.1, ***Scope Management Roles and Responsibilities***

Scope Definition

The scope for this project was defined through a comprehensive requirements collection process. First, a thorough analysis was performed on the company's current customer service procedure and data, including customer surveys as well as hard data on orders, repeat customers, rate of order entry by operator and other relevant statistics. In addition, interviews were conducted to determine the current feelings and culture among the operators regarding their job, level of frustration, obstacles they encounter, successes that they have and other things. These interviews and the data collection informed the scope of the project and the deliverables that are needed. From this information, the project team developed the project requirements documentation, the requirements management plan, and the requirements traceability matrix for what the new training and documentation must accomplish.

Project Scope Statement

The project scope statement provides a detailed description of the project, deliverables, constraints, exclusions, assumptions, and acceptance criteria. Additionally, the scope statement includes what work should not be performed in order to eliminate any implied but unnecessary work which falls outside the of the project's scope.

This project includes includes all tasks and deliverables that are needed to provide PJ Enterprises, Inc. with the training necessary to develop high quality customer service for their customer base. The deliverables for this project are

- New Product and Customer Service Training
- Operator Manual
- Product Reference Database Training

The project will also include the flexibility to modify and expand the deliverables as necessary in the future. This project will be accepted once the trainings have translated into effective operator customer service. This will be determined within four weeks of the training completion. Customer surveys, order processing data and operator feedback will be gathered and reported to the Project Sponsor. At that time, if changes need to be made to reach desired goals, they will be made then.

Assumptions made for this project include the following:

- As agreed upon with leadership, employees will be given one or two days off work duties (depending upon how long it is deemed the training needs to be) and paid for the training.
- The training will be mandatory under the circumstances above
- PJ will provide a space for the training that includes a projector and whiteboard and enough seating and table space for all employees to attend and participate.
- New product database will be up and running by the time we begin our project.

Constraints for this project include the following:

- Based on communication from leadership, the phone system will continue to be used as the main system for orders to be placed.
- The new product database will need to be used, regardless of how well it functions.
- The $400,000 budget will need to include everything, possibly even payroll for employees to take one to two days off for the training.
- Incentive programs for employees to apply the training effectively to maximize customer satisfaction will be in the hands of management.

Exclusions from this project include the following:

1. Job quality and satisfaction may be out of line with top performing companies in this industry. There may be some human resource and cultural issues at JR Enterprises that could be addressed to make the operator jobs more satisfying and reduce turnover. In addition, some of these factors may help JR Enterprises attract employees that are more committed to the company and their work.

2. Current ordering system is not aligned with technology and consumer buying trends and needs to be changed. This is being taken care of by PJ Enterprise, Inc. management at this time.

Work Breakdown Structure

In order to effectively manage the work required to complete this project, it will be subdivided into individual work packages which will not exceed 40 hours of work. This will allow the Project Manager to more effectively manage the project's scope as the project team works on the tasks necessary for project completion. The project is broken down into three components, New Product and Customer Service Training, Operator Manual, Product Reference Database Training (flow chart needs to be changed to reflect only the training part). Each of these phases is then subdivided further down to work packages which will require no more than 40 hours of work and no less than 4 hours of work (see WBS structure on the next page).

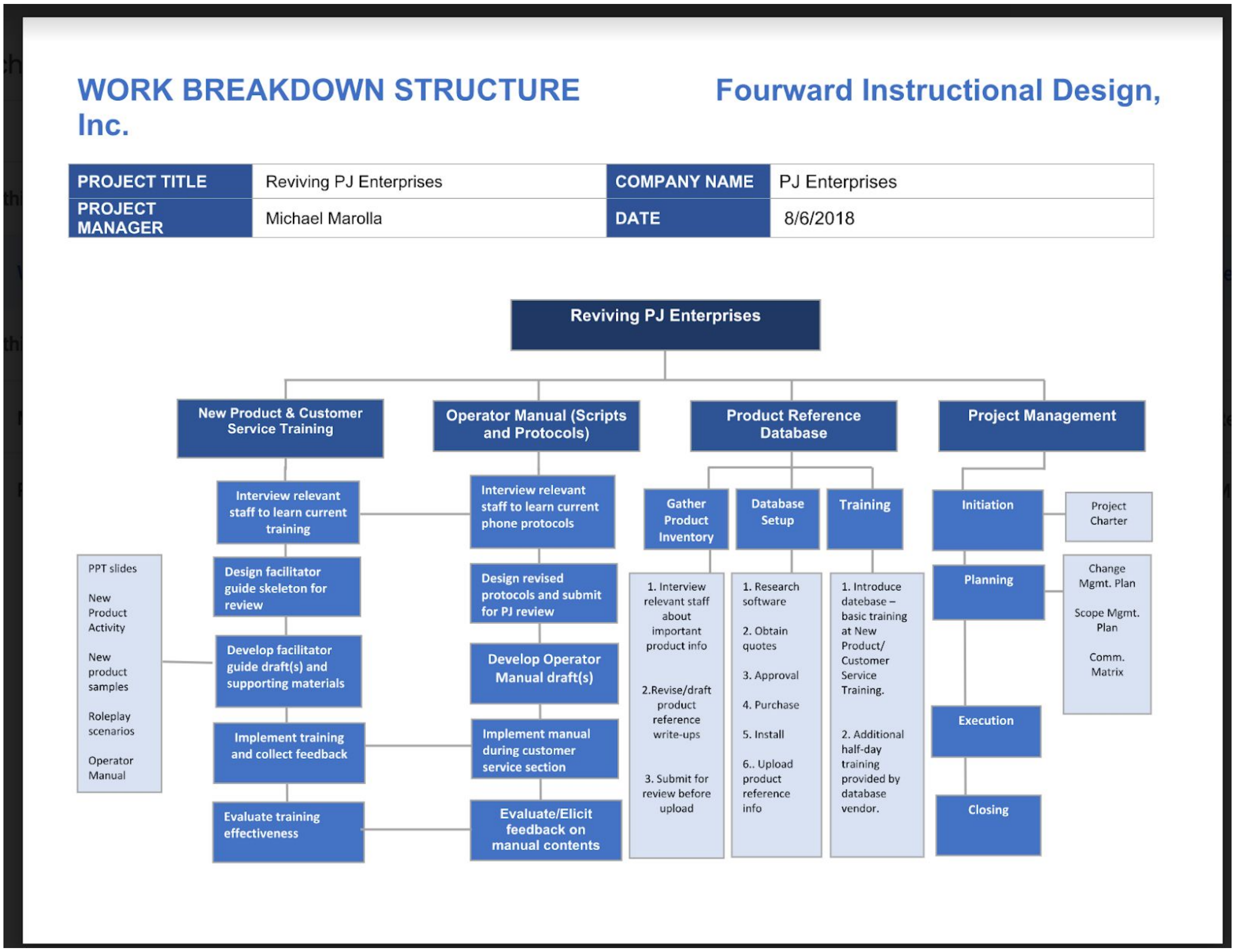

Figure 1.1, ***Work Breakdown Structure (WBS)***

In order to more clearly define the work necessary for project completion the WBS Dictionary is used. The WBS Dictionary includes an entry for each WBS element. The WBS Dictionary includes a detailed description of work for each element and the deliverables, budget and resource needs for that element. The project team will use the WBS Dictionary as a statement of work for each WBS element.

Level	WBS Code	Element Name	Description of Work	Deliverables	Budget	Resources

Scope Verification

As this project progresses the Project Manager will verify interim project deliverables against the original scope as defined in the scope statement, WBS and WBS Dictionary. Once the Project Manager verifies that the scope meets the requirements defined in the project plan, the Project Manager and Sponsor will meet for formal acceptance of the deliverable. During this meeting the Project Manager will present the deliverable to the Project Sponsor for formal acceptance. The Project Sponsor will accept the deliverable by signing a project deliverable acceptance document. This will ensure that project work remains within the scope of the project on a consistent basis throughout the life of the project.

Scope Control

The Project Manager and the project team will work together to control of the scope of the project. The project team will leverage the WBS Dictionary by using it as a statement of work for each WBS element. The project team will ensure that they perform only the work described in the WBS dictionary and generate the defined deliverables for each WBS element. The Project Manager will oversee the project team and the progression of the project to ensure that this scope control process if followed.

If a change to the project scope is needed the process for recommending changes to the scope of the project must be carried out. Any project team member or sponsor can request changes to the project scope. All change requests must be submitted to the Project Manager in the form of a project change request document. The Project Manager will then review the suggested change to the scope of the project. The Project Manager will then either deny the change request if it does not apply to the intent of the project or convene a change control meeting between the project team and Sponsor to review the change request further and perform an impact assessment of the change. If the change request receives initial approval by the Project Manager and Sponsor, the Project Manager will then formally submit the change request to the Change Control Board. If the Change Control Board approves the scope change the Project Sponsor will then formally accept the change by signing the project change control document. Upon acceptance of the scope change by the Change Control Board and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all project team members stakeholders.

Sponsor Acceptance

Approved by the Project Sponsor:

Date:

Sara Drake
VP PJ Enterprises

Communications Management Plan

Reviving PJ Enterprises

Fourward Instructional Design, Inc.
123 Fake Street
Philadelphia, PA 19148

8/4/2018

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Introduction

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings. A project team directory is included to provide contact information for all stakeholders directly involved in the project.

Communications Management Approach

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

As with most project plans, updates or changes may be required as the project progresses or changes are approved. Changes or updates may be required due to changes in personnel, scope, budget, or other reasons. Additionally, updates may be required as the project matures and additional requirements are needed. The project manager is responsible for managing all proposed and approved changes to the communications management plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with the project's Change Management Plan and ensures that all project stakeholders remain aware and informed of any changes to communications management.

Communications Management Constraints

All project communication activities will occur within the project's approved budget, schedule, and resource allocations. The project manager is responsible for ensuring that communication activities are performed by the project team and without external resources which will result in exceeding the authorized budget. Communication activities will occur in accordance with the frequencies detailed in the Communication Matrix in order to ensure the project adheres to schedule constraints. Any deviation of these timelines may result in excessive costs or schedule delays and must be approved by the project sponsor.

Fourward Instructional Design organizational policy states that where applicable, standardized formats and templates must be used for all formal project communications. The details of these policy requirements are provided in the section titled "Standardization of Communication" in this document.

Fourward Instructional Design organizational policy also states that only a Vice President or higher level employee may authorize the distribution of confidential information. The project manager is responsible for ensuring that approval is requested and obtained prior to the distribution of any confidential information regarding this project.

Stakeholder Communication Requirements

As part of identifying all project stakeholders, the project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the project manager in the project's Stakeholder Register. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the project's communication channels and ensure that stakeholders have access to these channels. If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.

Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project's Stakeholder Register and use this, along with the project communication matrix as the basis for all communications.

Roles

Project Sponsor - Sara Drake, Vice President of PJ Enterprises
The project sponsor is the champion of the project and has authorized the project by signing the project charter. This person is responsible for the funding of the project and is ultimately responsible for its success. Since the Project Sponsor is at the executive level communications should be presented in summary format unless the Project Sponsor requests more detailed communications.

Program Manager - Judie Thompson, Catalog Director of PJ Enterprises
The Program Manager oversees the project at the portfolio level and owns most of the resources assigned to the project. The Program Manager is responsible for overall program costs and profitability as such they require more detailed communications than the Project Sponsor.

Key Stakeholders - Sheena Perez, Judie Thompson, Customer Service Supervisors, and Operators
Normally Stakeholders includes all individuals and organizations who are impacted by the project. For this project we are defining a subset of the stakeholders as Key Stakeholders. These are the stakeholders with whom we need to communicate with and are not included in the other

roles defined in this section. The Key Stakeholders includes executive management with an interest in the project and key users identified for participation in the project.

Change Control Board - Julie Cabaniss, Chelsey Gieseler, Michael Marolla, Rebecca Schweitzer
The Change Control Board is a designated group which is reviews technical specifications and authorizes changes within the organizations infrastructure. Technical design documents, user impact analysis and implementation strategies are typical of the types of communication this group requires.

Customer

The customer for this project is PJ Enterprise, Inc. As the customer who will be accepting the final deliverable of this project they will be informed of the project status including potential impacts to the schedule for the final deliverable or the product itself.

Project Manager - Michael Marolla
The Project Manager has overall responsibility for the execution of the project. The Project Manager manages day to day resources, provides project guidance and monitors and reports on the projects metrics as defined in the Project Management Plan. As the person responsible for the execution of the project, the Project Manager is the primary communicator for the project distributing information according to this Communications Management Plan.

Project Team - Julie Cabaniss, Chelsey Giesler, Rebecca Schweitzer
The Project Team is comprised of all persons who have a role performing work on the project. The project team needs to have a clear understanding of the work to be completed and the framework in which the project is to be executed. Since the Project Team is responsible for completing the work for the project they played a key role in creating the Project Plan including defining its schedule and work packages. The Project Team requires a detailed level of communications which is achieved through day to day interactions with the Project Manager and other team members along with weekly team meetings.

Steering Committee - Judie Thompson, Sheena Perez, Ted Stevens (HR Director), Sara Drake (Vice President), Project Team
The Steering Committee includes management representing the departments which make up the organization. The Steering Committee provides strategic oversight for changes which impact the overall organization. The purpose of the Steering Committee is to ensure that changes within the organization are effected in such a way that it benefits the organization as a whole. The Steering Committee requires communication on matters which will change the scope of the project and its deliverables.

Technical Lead - Julie Cabaniss
The Technical Lead is a person on the Project Team who is designated to be responsible for ensuring that all technical aspects of the project are addressed and that the project is implemented in a technically sound manner. The Technical Lead is responsible for all technical

designs, overseeing the implementation of the designs and developing as-build documentation. The Technical Lead requires close communications with the Project Manager and the Project Team.

Project Team Directory

The following table presents contact information for all persons identified in this communications management plan. The email addresses and phone numbers in this table will be used to communicate with these people.

Role	Name	Title	Organization/ Department	Email	Phone
Project Sponsor	Sara Drake	Vice President PJ Enterprises	PJ Enterprises	sdrake@pj.com	(555) 555-1212
Program Manager	Judie Thompson	Catalog Director	PJ Enterprises	judiet@pj.com	(555) 555-1313
Project Manager	Michael Marolla	Project Manager	PJ Enterprises	michaelm@pj.com	(555) 555-1414
Project Stakeholders	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register
Customer	PJ Enterprises		PJ Enterprises	J.Doe@xyz.com	(615) 555-8121
Project Team	Michael Marolla Chelsey Giesler Rebecca Schweitzer Julie Cabaniss				
Technical Lead	Julie Cabaniss				

Communication Methods and Technologies

The project team will determine, in accordance with PJ Enterprises organizational policy, the communication methods and technologies based on several factors to include: stakeholder communication requirements, available technologies (internal and external), and organizational policies and standards.

PJ Enterprises maintains a DropBox platform within the PMO which all projects use to provide updates, archive various reports, and conduct project communications. This platform enables senior management, as well as stakeholders with compatible technology, to access project data and communications at any point in time. SharePoint also provides the ability for stakeholders and project team members to collaborate on project work and communication.
For stakeholders who do not have the ability to access DropBox, a web site will also be established for the project. Access to the website will be controlled with a username and password. Any stakeholders identified who are not able to access DropBox will be issued a unique username and password in order to access the web site. The project manager is responsible for ensuring all project communications and documentation are copied to the web site and that the content mirrors what is contained on the DropBox platform.

PJ Enterprises maintains software licenses for MS Project software. All project teams are responsible for developing, maintaining, and communicating schedules using this software. PERT Charts are the preferred format for communicating schedules to stakeholders. The project schedule will be maintained on both the DropBox platform and the project website.

All project communication and documentation, in addition to being maintained on the DropBox platform and project website, will be archived on the internal PJ Enterprises shared drive which resides in the PMO program directory. Organizational naming conventions for files and folder will be applied to all archived work.

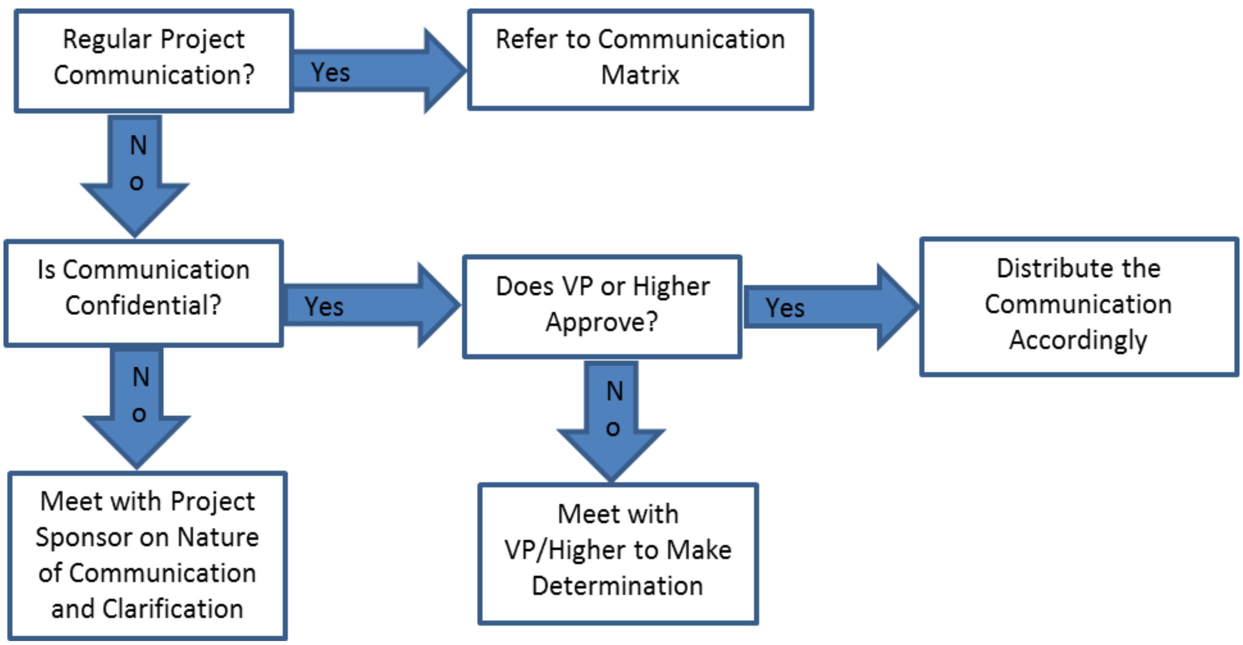
Communications Matrix

The following table identifies the communications requirements for this project.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	
Kickoff Meeting	Introduce the project team and the project. Review project objectives and management approach.	• Face to Face	Once	• Project Sponsor • Project Team • Stakeholders	Project Manager	• Agenda • Meeting Minutes	• Soft copy archived project in DropBox site and project web site
Project Team Meetings	Review status of the project with the team.	• Face to Face • Conference Call	Weekly	• Project Team	Project Manager	• Agenda • Meeting Minutes • Project schedule	• Soft copy archived on project DropBox site and project web site
Technical Design Meetings	Discuss and develop technical design solutions for the project.	• Face to Face	As Needed	• Project Technical Staff	Technical Lead	• Agenda • Meeting Minutes	• Soft copy archived on project DropBox site and project web site
Monthly Project Status Meetings	Report on the status of the project to management.	• Face to Face • Conference Call	Monthly	• PMO	Project Manager	• Slide updates • Project schedule	• Soft copy archived on project DropBox site and project web site
Project Status Reports	Report the status of the project including activities, progress, costs and issues.	• Email	Monthly	• Project Sponsor • Project Team • Stakeholders • PMO	Project Manager	• Project Status Report • Project schedule	• Soft copy archived on project DropBox site and project web site

Communication Flowchart

The communication flowchart below was created to aid in project communication. This flowchart provides a framework for the project team to follow for this project. However, there may be occasions or situations which fall outside of the communication flowchart where additional clarification is necessary. In these situations the Project Manager is responsible for discussing the communication with the Project Sponsor and making a determination on how to proceed.



Guidelines for Meetings

Meeting Agenda
Meeting Agenda will be distributed 5 business days in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

Meeting Minutes
Meeting minutes will be distributed within 2 business days following the meeting. Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.

Action Items
Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action

items resulting from the meeting. The review of the new action items will include identifying the owner for each action item.

Meeting Chairperson
The Chairperson is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chairperson will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

Note Taker
The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will give a copy of their notes to the Chairperson at the end of the meeting as the Chairperson will use the notes to create the Meeting Minutes.

Time Keeper
The Time Keeper is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Time Keeper will let the presenter know when they are approaching the end of their allocated time. Typically a quick hand signal to the presenter indicating how many minutes remain for the topic is sufficient.

Parking Lot
The Parking Lot is a tool used by the facilitator to record and defer items which aren't on the meeting agenda; however, merit further discussion at a later time or through another forum. A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. The Parking Lot list is to be included in the meeting minutes.

Communication Standards

For this project, PJ Enterprises will utilize standard organizational formats and templates for all formal project communications. Formal project communications are detailed in the project's communication matrix and include:

Kickoff Meeting – project team will utilize PJ Enterprises standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the PJ Enterprises standard slideshow template.

Project Team Meetings – project team will utilize PJ Enterprises standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the ABC Corp. standard slideshow template.

Technical Design Meetings - project team will utilize standard templates for PJ Enterprises meeting agenda and meeting minutes. Additionally, any slides presented will use the PJ Enterprises standard slideshow template.

Monthly Project Status Meetings - project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the ABC Corp. standard slideshow template.

Project Status Reports – project team will utilize ABC Corp. standard templates for meeting agenda and meeting minutes. Additionally the standard project status report document, available on the share drive, will be used to provide project status.

Informal project communications should be professional and effective but there is no standard template or format that must be used.

Communication Escalation Process

Efficient and timely communication is the key to successful project completion. As such, it is imperative that any disputes, conflicts, or discrepancies regarding project communications are resolved in a way that is conducive to maintaining the project schedule, ensuring the correct communications are distributed, and preventing any ongoing difficulties. In order to ensure projects stay on schedule and issues are resolved, PJ Enterprises will use its standard escalation model to provide a framework for escalating communication issues. The table below defines the priority levels, decision authorities, and timeframes for resolution.

Priority	Definition	Decision Authority	Timeframe for Resolution
Priority 1	Major impact to project or business operations. If not resolved quickly there will be a significant adverse impact to revenue and/or schedule.	Vice President or higher	Within 4 hours
Priority 2	Medium impact to project or business operations which may result in some adverse impact to revenue and/or schedule.	Project Sponsor	Within one business day
Priority 3	Slight impact which may cause some minor scheduling difficulties with the project but no impact to business operations or revenue.	Project Manager	Within two business days
Priority 4	Insignificant impact to project but there may be a better solution.	Project Manager	Work continues and any recommendations are submitted via the project change control process

** NOTE: Any communication including sensitive and/or confidential information will require escalation to VP level or higher for approval prior to external distribution.

Glossary of Communication Terminology

Term	Definition
Communication	The effective sending and receiving of information. Ideally, the information received should match the information sent. It is the responsibility of the sender to ensure this takes place.
Stakeholder	Individuals or groups involved in the project or whose interests may be affected by the project's execution or outcome.
Communications Management Plan	Portion of the overall Project Management Plan which details how project communications will be conducted, who will participate in communications, frequency of communications, and methods of communications.
Escalation	The process which details how conflicts and issues will be passed up the management chain for resolution as well as the timeframe to achieve resolution.

Sponsor Acceptance

Approved by the Project Sponsor:

Date:

Sara Drake
Vice President, PJ Enterprises

CHANGE MANAGEMENT PLAN

When it becomes necessary to change the scope or work schedule for the project, this form will need to be filled out and signed by the proper authorities in order for the change to be enacted.

Change Request Form

Project Name	Reviviving PJ Enterprises	Date	
Project Number	1981	Requestor	
Project Manager		Project Owner	

Describe the Requested Change

Describe the Reason for the Request

Risk Identification/Analysis

Impact Analysis	
Work Products to be Modified	Version Number

Decision	
☐ Approved	☐ Rejected
☐ Approved with modifications	☐ Deferred
Justifications	

Additional Comments

Approver's Printed Name

Date

Title

Design Document

Project Name: Reviving PJ Enterprises

Prepared by: Fourward Design, Inc. Julie Cabaniss, Rebecca Schweitzer, Michael Marolla, Cheley Gieseler

Date: 8/18/18

Target Audience:

The target audience for this project includes both the phone operators who handle all customer calls as well as their managers.

General learner characteristics: The age range for the operators spans multiple generations, from ages 22 to 65 years old. Both genders are represented, but the women outnumber the men by a ratio of 2 to 1. The education level for the operators is generally at the high school level with some operators having a little post-secondary education or training. The managers are also generally high school educated but have worked their way up in the organization and some of them have or are pursuing some higher education or training.

The level of comfort with the computer and software varies greatly among the operators, with the younger generation being digital natives and the older workers needing a bit more guidance and practice to help them build the skills and confidence they need to navigate the software efficiently. Overall, however, all operators are proficient to a level of at least a low intermediate (able to click and double click, mouse, and type at 35-40 wpm.

Many of the operators have families to take care of and a number of them are single parents. They have a lot of stress in their lives as they are in the low to middle low income bracket and trying to raise children. Many of the operators have another job in addition to the one they have at PJ Enterprises. Some of the younger operators may not have the family stressors but they are time-poor as well as low-paid. As a result of these stressors, many are always looking for better opportunities.

Application of learning theory:

Adult Learning Theory: According to Malcolm Knowles, there are four main principles to adult learning theory and they include the following (these are taken from the e-learning industry website: https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles)

1. Adults need to be involved in the planning and evaluation of their instruction.
2. Experience (including mistakes) provides the basis for the learning activities.
3. Adults are most interested in learning subjects that have relevance and impact to their job or life.
4. Adult learning is problem-centered rather than content-centered.

In the case of PJ Enterprises, this would mean that the operators and managers are consulted in advance as to what needs to change in their learning environment and process. This is covered as part of our planning analysis and is the foundation on which we will build the new learning resources. Also, learners will be learning via task-oriented activities throughout the training, which supports the experiential learning tenet in the theory. The relevance of this training is obvious, if the operators and managers are able to use the resources available to them in a more effective way, their job success and satisfaction will greatly increase. Finally, this training is entirely problem centered as it is being designed to address current problems in the customer service process.

Training format:

The training format will be blended format, realistic scenario lessons with prompt feedback from peers and the instructor.

Learning Environment

Organizational:

The operators and managers that handle all of the customer calls sit on one side of the corporate building and the rest of the staff and leadership sit on the other side. This is very representative of the division between the customer service department and the rest of the management and staff. The managers of the operators report to the vice president of the company on a weekly basis but that is it. The operators don't know the other managers or employees, they just know their direct, immediate managers. There is no effort to build a culture of camaraderie or caring amongst the operator staff. They just show up, punch in, do their job and punch out. There is no daily debriefing or check-in by the manager unless there is a problem.

Physical:

Every operator has a computer at their desk, they sit in cubicles to reduce noise interference. They are equipped with headsets for the calls that come in and they have comfortable chairs with rollers on the legs. Each operator has a spacious desk, unlimited pens, paper, any office supplies they need. There is a kitchen within a few yards of each caller with a water cooler and refrigerator for any food they bring in to work. They are given a 15-minute break twice during the day and also a 30-minute break for lunch or dinner, depending upon their shift.

The manager of the operators is available at all times to help when needed. The managers have their own office but it is close to where the operators are and when the operators need immediate help, they push a button that lights up a beacon on the top of their cubicle so that the manager knows he/she is needed immediately. There are different colors for the beacon that indicate whether the manager needs to dial into the call or is needed physically at the operator's desk.

1. Terminal Objective: Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.			
Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Demonstrate ability to log in to the database, locate search function, listen for product title or product ID number and effectively search for product.	Watch a screenshare video that demonstrates how to use the search function on the database.	Info Gap Worksheet: Search for 15 items on the worksheet given the information provided. First seven items are product IDs. Learner must fill in the product title. The other seven items are product titles. Learner fills in the ID.	Log into the database and listen to five calls. Learner will identify a product title or ID number to search based on call dialogue and pull up the correct product in the database within 30 seconds of the caller giving the ID or title.
	Assessment: n/a	Assessment: 100% of worksheet items are correct within 15 minutes.	Assessment: Learners are instructed to raise a hand upon completion with correct product displayed on their screen. Instructor will visually check for accuracy. 80% (4 of 5 call scenarios) accuracy within 30 seconds per scenario.
Identify product via key words in customers description.	Watch a screenshare video that demonstrates an operator effectively listening for key words and searching for a product in the new database.	Worksheet: Match written description with a new product.	Log into the database. Listen to a call. Learners determine keywords from the conversation on the call and search for correct product within 20 seconds.
	Assessment: n/a	Assessment: 9/10 of the worksheet items are correct within 10 minutes.	Assessment: Learners will complete 90% accuracy (9/10) scenarios when given 20 seconds per scenario.
Effectively communicate product information.	Watch a screen share video/audio of a call that demonstrates an operator effectively searching for a product, identifying related	Activity: Product Jeopardy In teams, learners will be quizzed on products based on keywords that they need	Roleplay: Information Gap - Customer calls - groups of three. Sitting back to back, pairs will roleplay while one

	products (as listed in product description) and upselling related products to a customer.	to search for or customer scenarios for upsell.	person observes with a rubric for feedback. Each roleplay participant has limited information about the situation and a goal. (Operators goal is to identify product based on keywords and upsell related products.)
	Assessment: n/a	Assessment: Each team should end with a minimum of three correct questions.	Assessment: Learners will evaluate each other as an operator using a rubric while they are in the observer role in the triad.

2. Terminal Objective: **Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.**

Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Demonstrate the ability to identify the correct and incorrect strategies in a practice scenario with the help of a partner.	Watch 3 training scenario videos. Each video will have different operator responses and strategies applied. Video will explain both the correct and incorrect strategies.	Learners will read through transcripts of their own calls and try to identify what they did right and wrong.	With a partner, learners will come up with different scenarios to "test" their partner. The duo will work together to assess the strategy.
	Assessment:	Assessment: Identify at least 80% of correct and incorrect strategies in your own calls.	Assessment: Learners will fill out a self-assessment when finished with this activity.
Identify why certain strategies are incorrect.	Listen to customer feedback about why their experience was not good. *Feedback will be focused specifically on the strategies taken by the operators*	In small groups, discuss why the targeted responses are incorrect and brainstorm on what could have made the experience better and why. Once completed, instructor will explain the reasoning of correct and incorrect strategies to the group.	Individually, the learner will be given a random call that did not go well. They will need to explain why the strategy taken was wrong and suggest a better strategy. They will need to backup their response with 2 reasons.

	Assessment: n/a	Assessment: learners are able to confer in small groups and discuss their experience.	Assessment: Learners are able to explain the “why?” of both the correct and incorrect strategy as defined on the rubric.
Properly identify the correct strategies on your own.	Instructors will explain the instructions for the final assessment of knowledge.		Learners will be acting out 5 live scenarios with a member of the instructional team. They will need to respond correctly to a variety of calls.
	Assessment:	Assessment:	Assessment: Learners must identify and respond correctly to at least 4 of the 5 scenarios. The score will come from a rubric designed by the instructional team.

Assessment Summary
Assessment summary -We have decided to use formative assessment where learners are able to demonstrate their proficiency with the task at hand. Learners who fail to master the skills will be redirected back to review the scenarios and content so that they can retake the formative assessments to master the process and information.

Evaluation Plan

Formative

Formative evaluation of the development of the learning solutions would be conducted throughout the project. It will consist initially of presenting the stakeholders with an outline and any prototype (a storyboard) of computer assisted training - scenarios for instance - to get their feedback and reaction. They will be asked to give unbridled feedback and will be encouraged to be honest because they will end up using this training in the end. (Instructional designers will not be offended:)

After this initial feedback, stakeholders that can provide ongoing feedback will be identified and approached to assist the Fourward ID, Inc. designers as the project proceeds. They will be allowed to stop their customer work and focus on the feedback when it is needed. They will be paid their hourly rate to do so and their quotas for customer service will be adjusted to account for their time away from the phones.

Future users/stakeholders will be asked to try and use/understand the portion developed that week, and give feedback that will inform continuing development or revision of the developed portions.

It is expected that oftentimes the designers will solicit feedback more frequently than once a week as they develop working relationships with the stakeholders.

When the first draft of the entire course is completed, the stakeholders will be asked to go through the entire training for a final review before it is implemented.

Summative

The summative evaluation will be done a week and then again a month after implementation of the training. It will consist of the following:

- Survey of the operators and managers that hones in on their feelings about their job performance and satisfaction before and after the training.
- Data Analysis: Managers and Fourward Instructional Design will look at the customer satisfaction data, call volume and resolution and finally bottom line sales figures after the training.
- In addition, course completion by employee will be documented and compared to the change in their performance.
- Any changes that need to be made will be documented and shared with management, with a recommendation and cost estimate as to when and how they could be done.

Confirmative

Six months after the training has been implemented, it is recommended that another, abbreviated analysis be conducted to be sure the training had the intended outcomes on an ongoing basis. This confirmative evaluation will consist of the same items as the summative evaluation but the survey will be shorter. The data analysis will still be done, however and recommended changes from the summative evaluation will be revisited.

Reviving PJ Enterprise

A Facilitator's Guide to Redesigning Customer Service at PJ Enterprise, Inc.

Contents **Page(s)**

Introduction

The goal of this facilitator's guide is to equip the trainer with the lesson plans and all resources needed to conduct the training successfully. The purpose of the training is to change how the customer service department operates, so that the customer service representatives have a high rate of success closing sales and pleasing customers. The hope is that after the training, PJ Enterprise, Inc. customers will give mostly positive feedback about their experience, and not only return to buy more merchandise from the company but also promote the company to their friends. If successful, this training and expected outcomes will result in a growing customer base and increased revenue for the company.

To reach this training goal, Fourward Instructional Design, Inc. will provide the following services and deliverables:

- New Product and Customer Service Training
- Product Reference Database Training

This facilitator's guide addresses both of the trainings.

Purpose of this Facilitator's Guide

PJ Enterprises is changing how customer service representatives are trained on the company's products and how they interact with customers over the phone. In order to make these changes, the customer service representatives will go through a new two-day training which will cover the following product reference database training and new product and customer service training. This facilitator's guide provides detailed information and direction to anyone conducting these trainings. It includes step-by-step guidance for an instructor, even if they are new to PJ Enterprises and relatively unfamiliar with the environment.

Target Audience: The audience for this training includes customer service representatives as well as all managers that oversee customer service. In addition, the merchandising manager should go through the training with the customer service staff and management.

Learning Objectives

The Learning Objectives for this course include:

1. Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.
2. Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.

Learning Environment

Location:

Training is to be held at the PJ Enterprise corporate headquarters in Philadelphia, Pennsylvania. The Human Resources Department will host the training and the head of HR, Sara Finley is the contact person regarding the facilitation of this training. There is a large conference room that can function as a temporary training room. There are a few desktop computers in that room, however, most of the trainees will bring their laptops from their desks.

Prior to the day when training takes place, JP Enterprises will meet with the IT Department to make sure that all employees can access the new software on their laptops and that the security requirements have been implemented.

Equipment and Materials:

- User's manual for telephone system
- Whiteboard
- Projector hooked up to a computer.
- A wall, screen or whiteboard on which to project images/videos.
- Sticky flipchart
- Post-its
- Markers/pens and extra paper.
- Laptops or desktop computer, chair and desk for every trainee.
- Speakers that hook up to the computer for audio for all that is being projected (videos, etc..)

Time Requirements

Time duration estimates for each session are listed in a separate column. No specific time has been assigned to allow flexibility for scheduling purposes. Note that breaks have been built in, however, to allow opportunities for restroom visits and snacks. Total session times (to include breaks) have been included at the end of every enabling objective.

Facilitator Expectations

Prior to Training

It is recommended that facilitators meet with personnel from PJ ENTERPRISES several weeks prior to the training in order to:

1. Gather more information about the audience members' needs and priorities and past experiences with the content
2. To go over the lesson outline, the timing and facility requirements.
3. Request to see the actual room where the training will take place and review with the personnel representative how the equipment will be set up and where the trainees will sit.
4. Solidify access to copiers and other resources they may need to use to prepare for the training.
5. Create a checklist for standard meeting protocol which everyone during the training will need to abide by - for instance, no cellphones, respect one another, etc…
6. Provide a pre-training survey to the customer service trainees asking about their job satisfaction and frustrations they currently encounter on the job.

During Training

During the two days of training, facilitator will assume that the following will take place:

1. All customer service representatives and managers will be on time and present for the entire training.
2. All trainees will be paid their normal hourly rate for attending the training.
3. There will be a one hour lunch break for all trainees both days.
4. Standard meeting protocol will be observed by facilitators as well as all trainees (no cellphones, respect one another, etc…)
5. Formative assessment/check-ins will be conducted throughout the training to ensure all participants feel comfortable and are encouraged to give feedback regarding how the training is going for them - to make sure the hours spent in the training are not wasted.

After Training

1. Provide students with the end of course survey and a certificate saying they went through the training.
2. Follow up with managers a week later as to how the customer service training is working.
3. Two weeks after training, verbally check in with customer service trainees and ask the how their days are going and if they are having any difficulties. The point of this is to see if they are applying the best practices that they learned in training or are they resorting to their old behavior. If they aren't applying the practices, the facilitator can provide a one-page cheat sheet review or checklist to them or their managers to remind them what they need to do.

4. Four weeks after training, provide students with the same survey they received prior to training regarding job satisfaction and frustrations they are encountering.
5. Four weeks after training the facilitator should also work with the head of L & D to analyze the call data - customer satisfaction and sales figures - along with the trainee surveys to see what may need to be done in the near or not-so-near future.
6. A final evaluation report will be written by Fourward ID, Inc., based upon the four week data and will be submitted to management and the facilitator.

Expert Product Knowledge Workshop Objectives

Terminal Objective: Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.

Enabling Objectives:
1. Demonstrate ability to log in to the database, locate search function, listen for product title or product ID number and effectively search for product.
2. Identify product via keywords in customer description.
3. Effectively communicate product information.

Terminal Objective: Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.

Enabling Objective:
1. Demonstrate the ability to identify the correct and incorrect strategies in a practice scenario with the help of a partner.
2. Identify why certain strategies are incorrect.
3. Properly identify the correct strategies on your own.

Objectives and Facilitator Guide

<table>
<tr><td colspan="2">Terminal Objective: Given a customer request prompt, learner will be able to access correct product description using ID or descriptor within 20 seconds and communicate product information to customer.</td></tr>
<tr><td colspan="2">Enabling Objective 1: Log on to database, locate search function, listen for product title or ID and effectively search for product.</td></tr>
<tr><th>Activities and Methods</th><th>Time Estimate</th></tr>
<tr><td>1. Introduction and Housekeeping:
➢ Introduce self, general training agenda, restroom location, break times,
➢ Ice Breaker activity: members will go around the room saying 2 truths and one lie about themselves. The group will have to figure out which statement is the lie about the person. Each person will have the chance to give their 2 truths and a lie.

3. Introduce Training Objectives (see slide)

4. Brainstorm/Discussion:
“What are some challenges you experience when it comes to communicating with customers about products over the phone?”

➢ Elicit feedback about common issues and experiences, scribe on the whiteboard. Group or categorize into common themes (brainstorm web, etc.)
○ If not yet addressed, ask about access to product information and access speed as an introductory transition to feedback and goals, below.</td><td>10 min

10 min

5 min

5 min

15 min</td></tr>
</table>

5. Presentation (Absorb) ➢ Introduce aggregate customer feedback on surveys and operator / customer service representative goals for this fiscal year. ➢ Introduce the new database as a solution most requested by operators during needs analysis. Play video demonstration of database (shows basic features including step by step of how to search) <link> ➢ Elicit any questions from the group before moving on to practice activity.	20 min
6. Practice Activity (Do) – Info Gap Worksheet ➢ Introduce activity: *"Now that we've seen a step by step video of how to use the basic search function on the database, let's learn by doing as we practice using this new tool."* ➢ Read worksheet directions aloud and summarize task. Demonstrate the example by using the projector, but ask learners to direct you about what to do step by step. *("Okay, what do I need to do first? ...Great, now I've logged in. Next, what should I click?")*	10 min
➢ Pass out worksheet and set learners free to work at their stations. Inform them of how long they have to complete the activity – 15 minutes. ➢ Give a five-minute warning before bringing the group back together to debrief.	15 min
7. Debrief: ➢ Check answers as a group. (Slide 6) Elicit answers from learners and ask them to tally their total at the top.	5 min

8. Practice Activity (Connect) – Listening to Calls ➢ Introduce activity: *"So far we've learned how to use the database to search for products. Now let's add another element – a customer request. The goal of this activity is to listen for the correct product information and pull it up within 30 seconds of hearing the customer request."* ➢ Facilitator will play a recording of five calls. Learners will listen to each call and identify a product title or ID number to search for based on call dialogue and pull up that info within 30 seconds. When the learner has the information on the screen, they should raise their hand immediately. ➢ Facilitator will use a stopwatch to time from the moment the customer in the call gives the product information. Visually check to see who has the correct information pulled up on their screen after their hand is raised. **9. Debrief:** ➢ Discussion / Self-Reflection: Work in small groups (4-6 people) to discuss these questions, then come together as a group to talk about what was said. ➢ Inform learners there will be 10 minutes to work in groups, then 10 as a whole. Give a 5 minute time warning before bringing groups together. Discussion Questions: o *How did you do with these two activities?* o *What do you like about this new tool? How do you think it might make customer calls easier?* o *Anything you found challenging or didn't like with the database so far? Any other functionality you'd like to have?*	15 min 10 min
BREAK	**10 min**

Total time for Introduction, EO #1	**2 hours**

Enabling Objective 2: Identify product via key words in a customer's description.	
1. Introduction (Absorb): *"Welcome back. So far we've practiced using the database to search for products when the ID or exact name is given by the customer. But as we know, sometimes the customer doesn't have that information readily available, so we are left to fill in the blanks to try to figure out what product they might be talking about. The database is going to help us with that by using the key word search function. This will save time and energy that should reduce miscommunication, call wait times, returns and the overall likelihood of customer dissatisfaction. Let's watch a video to learn the steps."* ➢ Learners watch a video (shows the steps of how to do a keyword search as they see an example scenario of a call with a customer who doesn't know an exact product title or ID.) <link>	10 min
2. Practice Activity (Do) – Matching Worksheet ➢ Summarize the directions for the worksheet (Handout #2): • Complete worksheet by matching customer quotes with new products, with database as help. ➢ Inform learners they will have 10 minutes to complete the worksheet. ➢ Give a two minute time warning before ending activity.	15 min
3. Debrief: ➢ Check answers as a group. Elicit answers from learners and ask them to tally their total at the top. ***Learners must have an 80% or better to pass this activity***	5 min

➢ *If 80% is not reached, the learner must set up a time to review with the instructor.*	10 min
4. Practice Activity (Connect) - Listening to a Call ➢ Facilitator will play a recording of five more calls of customer dialogues with operators. Learners will listen to each call and identify keywords to search for the product. When the learner has the information on the screen, they should raise their hand immediately. ➢ Facilitator will use a stopwatch to time from the moment the customer in the call gives their description of the product (this time there will not be an exact title or ID). Visually check to see who has the correct information pulled up on their screen after their hand is raised.	
5. Debrief: ➢ Reveal answers and clarify any questions about the process of keyword searching. ➢ Reflection - Think, Pair, Share: Learners work in pairs to reflect on the questions below (Slide 10) for 5 minutes and then share thoughts as a group. Give a two minute warning before bringing the group back together and leading a discussion / scribing responses. ○ *What are some good clarifying questions, statements or strategies operators can use to gain more information about an item?* ○ *How can you "buy more time" politely if you need it?* ○ *What is the longest you feel is okay for a customer to wait on hold?* ○ *What is the protocol in place if you can't find the item a customer is looking for?*	20 min

Total time for EO #2:	**1 hour**

Enabling Objective #3: Effectively communicate product information to customer.	
1. Introduction (Absorb): *" Now you've demonstrated that you can effectively search for the products customers ask for. But can you effectively <u>communicate</u> that product information to the customer? We are going to work with new products to practice this important skill."* ➢ Learners will also watch a video that demonstrates best practices in effective communication of product information. ➢ Learners will be given 10 minutes to explore the new products offered by clicking on the section of the database called "New Products" and reading product descriptions. Instruct learners to think about what keywords would be associated with each, and what information would be important to convey to a customer.	15 min
2. Practice Activity (Do): New Product "Jeopardy" < Quiz link> ➢ Facilitator acts as game show host as learners work in teams to answer questions about new products. Winning team gets five dollar gift cards to Starbucks. ***Rules/Notes***: ● Learners cannot use the "New Products" section of the database, but are allowed to use the search functions they have learned. ● For the purposes of this practice, learners should not form answers as questions since they are simulating real situations. ● On each team, learners must alternate allowing each person to be the team "speaker" who answers questions so that all learners have a chance to demonstrate ability to effectively communicate product information.	30 min

3. Debrief - Group discussion: ○ *What similarities are there between this game and being an operator at work? What skills are needed to be successful in both?* ○ *Which three new products do you think will be the best sellers this year? Why?*	5 min
4. Practice Activity (Connect) - Customer Role Plays *"You've demonstrated your ability to listen for the right information, search on the database and effectively communicate product knowledge. Now let's put it all together in a role play to make it more realistic. This activity will help you practice your product knowledge and communication skills on the spot. It gives you a chance to work on strategies for when things aren't perfectly clear or don't go as planned. The more you practice, the more likely you are to feel ready when talking to customers at work."* ➢ Learners will work in groups of three. Sitting back to back, pairs will roleplay their side of the interaction written on their handout while the third observes with a rubric **(Handout 5)**. *Example:* <u>Person A - Customer:</u> You are calling because you want to order three items that you saw in the catalog, but you can't find the catalog. You remember what the items look like and can describe them (choose three new products to describe without IDs) <u>Person B - Operator:</u> Listen to the call and effectively search for the item within 20 seconds, communicate the product information and take the order. <u>Person C - Observer:</u> Use the rubric to evaluate the operator. Evaluate for timeliness, product knowledge, correct protocol and politeness.	30 min

➢ After each role play, observer gives feedback to the operator. Learners indicate they are finished with that round and facilitator will pass out a new scenario sheet to each participant in the group. Be available to learners with any questions by walking around. **5. Debrief:** Sticky Questions ➢ Write the following questions on sticky flip chart paper. Post them around the room and ask learners to walk around and write replies to each. After 10 minutes, come together to discuss answers as a group. Sticky questions: ○ *What one word comes to mind when you think about how this activity made you feel?* ○ *What did you learn from watching others perform their role plays?* ○ *As the operator, what did you enjoy about interacting with your "customer?"* ○ *As the customer, how did you feel while you were trying to explain the products you didn't have ID's for?* ○ *What was the hardest thing about the roleplay?*	20 min
Break	**20 min**
Total time for EO #3 with break	**2 hours**

Terminal Objective 2: **Given a customer service scenario, learners will be able to correctly identify and demonstrate the correct strategy for action.**	
Enabling Objective 1: Demonstrate the ability to identify the correct and incorrect strategies in a practice scenario with the help of a partner.	
Activities and Methods	**Time Estimate**
1. Introduction ➢ Review Terminal Objective 1 and what was learned in previous training. ➢ Overview of this part of the training	10 min
2. View Operator Scenario Training Videos *"I want you to pay attention to the good AND bad in these videos. What was done well? What could be changed?"* ➢ Training Video #1- more good than bad behavior ➢ Training Video #2- more bad than good behavior ➢ Training Video #3- equal good and bad behavior	15 min
3. Group Discussion/Q&A *"Think about how you approach your calls. Do you recognize any of the actions that came about in the video? Let's discuss what happened."* ➢ Discuss what was seen in the videos. *Do you agree disagree? Why/why not?*	20 min

BREAK	**5 min**

4. Reading your own transcripts (Do Activity) ➢ Instructor reads a sample transcript and demonstrates how to approach the review. *"While you read through your transcripts, try to look at them as if they were someone else. Imagine they were the anonymous operators from the training videos."* ➢ Learners will have 5 transcripts of their own calls. They will be reading and taking notes. ➢ Learners will use the Transcript Activity Sheet to mark down what was done right and wrong in each of their calls. ***Learners must have an 80% or better to pass this activity**** *If 80% is not reached, the learner must set up a time to review with the instructor.*	30 min
5. Partner Scenarios (Connect Activity) ➢ Introduce Activity: *"In this activity you will be working with a partner. Each of you will take turns being the operator and the customer (2 times each or time permitting). As the customer, you will try to test the operator (your partner). Don't take it easy on them, we want to practice some of the things we learned.* ➢ Allow the learners to work with their partners in these scenarios of their own creation. Walk around the room and encourage the learners. **6. Complete Self-Assessment** *"Now it is time to complete a self-assessment of the work you have done so far. Answer the questions on the sheet as honestly as possible. The goal is for you to reflect on this portion of the training and decide how you feel that you are progressing."* ➢ Learners complete the self-assessment	20 min 15 min
Total time for Objective 1	**1 hr 55 min**
Break	**15 min**
Enabling Objective 2: Identify why certain strategies are incorrect.	

1. Customer Feedback (Absorb Activity) *"Now we are going to listen to some real customer feedback. This feedback will focus on the specific strategy that was taken by the operator and why the customer was unhappy about it"* **2. Read the Feedback** *Instructor will read the feedback. After each reading, try to get get a response from one or two of the learners. Do not agree or disagree with their response. Just try to get them talking about it. Try to get through as many pieces of feedback as time will permit (at least 5)* **3. Debrief** *"How did you feel listening to that feedback? Does any of that sound like experiences that you have had?*	5 min 15 min 10 min
4. Small Group Conference (Do Activity) *Learners will confer with the group members sitting at their table. Instruct them to discuss the good and bad of the feedback. When discussing the bad, instruct learners to brainstorm on a better approach for the situation.* **5. Brainstorming Conference** **6. Debrief** *Bring the group back together and listen to the strategies that they came up with for the feedback. Try to pick one group per piece of feedback, unless someone feels strongly about sharing.*	5 min 15 min 15 min
7. Individual Call Assessment (Connect Activity) *"Now it is time for you to work on your own. You will be given one call to listen to at random. Each call will have at least one strategy that is wrong. Your job is to identify the strategy, explain why it is wrong, and suggest a better strategy. You will need to backup your choice with at least 2 pieces of reasoning. "* **8. Learners Assess** *Now is the time that they will be listening to the call. They will be writing down their thoughts and strategies. Be sure to stress that the learners backup their choices.* **9. Rubric** *Give learners the rubric to self-assess. Give them a chance to discuss this with the people at their tables.*	5 min 15 min 15 min

TOTAL TIME FOR OBJECTIVE 2	**1 hr 40 min**

LUNCH BREAK	**1 hr**
Enabling Objective 3: Properly identify the correct strategies on your own.	
1. Explanation for Final Assessment of Knowledge (Absorb Activity) *"You made it! Now it is time for you to test what you have learned. Each of you will be broken up into smaller groups with various members of the instructional team. You will be acting out 5 live call scenarios with a member of the instructional team. You will be the operator and the team member will be the customer. You will need to respond to a variety of different calls and choose the best strategy for action. You will be assessed on the rubric that is in front of you. You will need to identify the correct strategy and respond correctly to 4 out of 5 scenarios to successfully pass this assessment." -Be sure to ask if anyone has questions.* ****Learners/Instructional Team groups have been pre-assigned. See the binder for a list**** **2. Scenario Assessments (Connect Activity)** **3. Conclusion** *Inform learners that they will be notified within 5 business days about their results and feedback. The team will discuss any remediation (if needed) with supervisors. All recommendations will be made to the learner directly via email.* ****Be sure to give phone number/email to learners if there are follow-up questions and/or issues with the results and feedback.***	10 min 2 hours 10 min
BREAK – *1 HOUR INTO THE ABOVE ACTIVITY*	**10 MIN**
TOTAL TIME FOR OBJECTIVE 3	**2 hrs 30 min**

Fourward Instructional Design, Inc.
Reviving PJ Enterprise

Project Execution Plan
for
Redesigning Customer Service at PJ Enterprise, Inc. Project

September 8, 2018

Stakeholder Approvals

Approval Date

____ _______________

Sara Drake - Project Sponsor
Director of Learning and Development
PJ Enterprises, Inc.

____ ______________

Julie Cabaniss
Project Manager
PJ Enterprises, Inc.

____ ______________

Joe Smith
Vice President
PJ Enterprises, Inc

Contents **Page(s)**

Introduction

The project execution phase takes place after the project plan has been developed and is ready to be implemented. The goal of this Project Execution Plan is to provide a comprehensive document that outlines the way in which the progress of the project will be monitored, controlled and reported on, to ensure the most timely and efficient completion of the project. The scope and goals of the project will be summarized again up front and the process outlined here will also include quality assurance measures. If, during the implementation phase, it is determined that a change to the scope of the project is necessary, the process for such a change will be outlined as well in this document. Finally, the necessary forms, charts, checklists, etc.. are included as appendices and referred to throughout the plan.

Changes to this document can be made as the project proceeds, if it appears the need is there. Updates to this document are not uncommon as the project moves forward.

Project Scope and Objectives:

This project includes all tasks and deliverables that are needed to provide PJ Enterprises, Inc. with the training necessary to develop high quality customer service for their customer base. The deliverables for this project are

- New Product and Customer Service Training
- Operator Manual
- Product Reference Database Training

The project will also include the flexibility to modify and expand the deliverables as necessary in the future. This project will be accepted once the trainings have translated into effective operator customer service. This will be determined within four weeks of the training completion. Customer surveys, order processing data and operator feedback will be gathered and reported to the Project Sponsor. At that time, if changes need to be made to reach desired goals, they will be made then.

Quality Assurance

Quality assurance process summary goes here.

Project Execution Plan Overview

All parts of the project management oversight, monitoring and communication go here.

See Forms in Appendices next:

Appendices

The following pages contain forms, charts, datasheets that may be used during the project execution phase. They are referenced in the body of the execution plan above and can be printed out an used or used as electronic templates.

Appendix A - Communication Matrix Chart for Reference

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COMMUNICATIONS MATRIX

The following table identifies the communications requirements for this project.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Kickoff Meeting	Introduce the project team and the project. Review project objectives and management approach.	• Face to Face	Once	• Project Sponsor • Project Team • Stakeholders	Project Manager	• Agenda • Meeting Minutes	• Soft copy archived on project DropBox site and project web site
Project Team Meetings	Review status of the project with the team.	• Face to Face • Conference Call	Weekly	• Project Team	Project Manager	• Agenda • Meeting Minutes • Project schedule	• Soft copy archived on project DropBox site and project web site
Technical Design Meetings	Discuss and develop technical design solutions for the project.	• Face to Face	Bi-weekly	• Project Technical Staff • Project Team	Technical Lead	• Agenda • Meeting Minutes	• Soft copy archived on project DropBox site and project web site
Monthly Project Status Meetings	Report on the status of the project to management.	• Face to Face • Conference Call	Monthly	• PMO	Project Manager	• Slide updates • Project schedule • Changes (if any)	• Soft copy archived on project DropBox site and project web site
Project Status Reports	Report the status of the project including activities, progress, costs and issues.	• Email	Monthly	• Project Sponsor • Project Team • Stakeholders • PMO	Project Manager	• Project Status Report • Project schedule • Changes (if any)	• Soft copy archived on project DropBox site and project web site

Daily Check-in

To prepare for the weekly project team meetings, the Project Manager will do daily or every other day check-ins with every team member to monitor progress, social factors like how members are working together and how they feel about the work they are accomplishing. This will also allow the Project Manager to learn of any changes that need to be made to the project or risks that may be cropping up. A form for this daily check-in can be found in Appendix C.

Appendix B - Example Meeting Agenda and Minutes

Project Execution Phase Meeting Agenda

Reviving PJ Enterprises

9/6/18

Present: Joe Smith, Julia Cabaniss, Michael Marolla, Rebecca Schweitzer, Chelsey Geiseler

Meeting minutes BLUE

- Welcome
- Project Update
  - How are things progressing?- Update from Project Manager

  -All is going according to schedule so far. PM reports that team members have the necessary information and content to create the modules of training.

  -PM reports that communication has been going well. No issues to report.
  - Are things on schedule?- Update from Project Manager

  -PM reports that there have been some logistical questions the team is working out in regards to scenario training (Terminal Objective 2). The team is working with PJ Enterprises to solidify a plan for use of space. This has caused some delay, but there is no reason to believe that it is anything to worry about at this point.
  - Do we foresee any issues?- All parties involved

  -PM sees no major issues that will prevent the successful completion of the project.

  -VP concurs with PM and has no major issues to report.

  -Team members all share and believe that there are no major reports at the moment.
- Change Request
  - Presentation of the change request

  -VP presents and explains the request for an extra day of training. This training will focus on soft skills for the staff.

  -VP will leave it up to the PM and team to determine the best approach (if approved). This could involve in-house resources or the hiring of a SME.
  - Reasoning for change

  -VP believes that this is something that would makes sense, given the nature of the original training plan. Soft skills was not identified as a major need, but it never hurts to brush up on these skills. The hope is that this training will only work to solidify the future success of the staff and company. This will only help to meet everyone's goals.
  - Objections?

  -PM is not opposed to the idea. Pm would like to confer with the team to go over details and determine the impact of the change. Upon first view it seems doable, but the PM wants to do a more thorough analysis with the team.

  -PM has some concerns about schedule and budget, but would like to analyze further.
- Closing Remarks- Agreement to schedule a meeting next week to discuss impact/plan.

Appendix C - Daily Team Member Check-in

Daily Team Member Check-in

Project Name	Reviviving PJ Enterprises	Date	**9/6/18**
Project Number	1981	Team Member for Check-in	Rebecca Schweitzer
Project Manager	Julie Cabaniss	Project Sponsor	Sara Drake

Team Member Responsibilities

Progress made today/Are you on target?

Concerns or Needs

Possible problems down the road?	

Things that are going well:
Additional Comments

Project Manager Printed Name

Date

Signature

Title

Appendix D - Project Status Report

Project Status Report

Weekly Project Status Report

To		Date	End of the week
From		Team Members	
Project		Project Sponsor	

Project Status
There will be a bar at the top of this section (examples seen above), indicating whether the project is on schedule (green), is somewhat delayed or may be delayed - there are risks looming (yellow), or it has or is in serious risk of being delayed or failing. The purpose of this color bar is for management to quickly assess where the project is and if it needs their immediate attention. The body of this status box will then compare the original timeline with where they are now. The option exists to use the Earned Value Methodology or something less mathematical where the work package for the week is clearly outlined and it is clear that the tasks either were or were not completed.

Activities Completed This Week:

Activities in Process	Next Action	Due Date

Activities to Be Started Next Week

Change Requests or Issues that Need Immediate Attention
Additional Comments

Project Manager Printed Name

Date

Signature Title

Appendix E - Project Change Request Form

Change Request Form

Project Name	Reviviving PJ Enterprises	Date	**9/6/18**
Project Number	1981	Requestor	Project Manager, Michael Marolla
Project Manager	Michael Marolla	Project Owner	Sara Drake, VP of PJ Enterprises

Describe the Requested Change
We would like to add one extra day of training for our staff to work on Soft Skills. We feel that this could only help with our desired outcomes and should fit in well with the trainings currently in place.

Describe the Reason for the Request
Given the nature of the trainings that are currently being developed, we believe that the addition of this training can only help improve the skills of our staff. Though we don't feel that this is an area where the staff is severely lacking, we feel that it can only help to have some training on soft skills. Everyone can benefit from some soft skills training. We believe that this addition, in conjunction with the other trainings being developed, will only work to boost the productivity and success of our staff.

Risk Identification/Analysis
We understand that the staff may take offense to this or think that we are accusing them of having no soft skills. This is not the case. We will work to help them understand the decision for this training.
Will we have to change the schedule and projected dates of delivery?

Impact Analysis	
Work Products to be Modified	Version Number
1. The overall training schedule will need to be changed.	2
2. The language in the training may need to be changed to reflect the soft skills training.	2

Decision	
☐ Approved	☐ Rejected
☐ Approved with modifications	☐ Deferred
Justifications	
Additional Comments	

Approver's Printed Name ____________ Date ____________

Signature ____________ Title ____________