

Project Charter for Fourward Instructional Design (Team 2)

Due: July 30, 2018

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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.

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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		