

Project Charter for Team 2

November 8th, 2020

Project Name

Help PJ Enterprises

Project Sponsor

Chief Operations Officer (PJ Enterprises)

Project Owners

HR Manager and Sales Manager (PJ Enterprises)

Stakeholders

- Judie Thompson, Catalog Director (PJ Enterprises)
- Sheena Perez, Merchandising Manager (PJ Enterprises)
- Customer Service Supervisors (4) (PJ Enterprises)
- Instructional Designers
- Systems Administrator (PJ Enterprises)

Table of Contents

Business Case	3
Business Objectives.....	3
Project Deliverables	3
In Scope.....	4
Out of Scope.....	5
Project Completion Criteria	6
Project Milestones	6
Risks	7
Assumptions.....	8
Constraints	8
External Dependencies	8
Vendor Assistance Required	8
Approvals	9
Scope Management Plan	10
Scope Management Approach	10
Roles and Responsibilities.....	11
Scope Definition.....	12
Project Scope Statement	12
Work Breakdown Structure	13
Scope Verification	15
Scope Control.....	15
Communications Matrix	16
Change Request Form	18
Sponsor Acceptance.....	19
Change Request	20
Scope Verification Form.....	22

Business Case

Management at PJ Enterprises wants to increase sales from \$5 million annually, \$10 million in catalog sales, and \$5 million from the retail division to \$7 million, \$13 million and \$7 million, respectively. Individual sales are relatively small (\$250-\$500), so revenue and growth are driven primarily by sales volume. Establishing an ecommerce website for customers to place orders online facilitates additional sales by providing fast, convenient 24/7 access to purchases without queues. Furthermore, an increasing proportion of PJ Enterprise's target audience (women aged 25-55 with family incomes of \$40k-80k) consists of Millennials, who tend to prefer making online purchases. An online platform also allows for faster delivery of marketing content to a wider audience.

Maintenance costs for an ecommerce website are low compared to the costs associated with hiring and maintaining a larger workforce. These lower costs combined with increased sales generated from the ecommerce site will move PJ Enterprises toward its increased profit goal for this year (\$1 million to \$2 million).

The training portion of this project will address staff knowledge and skill in serving customers. Currently, two out of every three respondents to the customer service survey complain about service, including telephone operators' lack of product knowledge and telephone etiquette. Customers also report that even after long wait times, telephone operators are frequently unable to answer their questions and ask customers to call back or transfer them to customer service supervisors. Half of last year's respondents are not inclined to do business with PJ Enterprises again because of poor customer service. This suggests a high risk of customer attrition, which will work against sales growth and profit goals. Training that utilizes effective instructional design and assessment to evaluate learning will increase telephone operators' ability to answer questions, solve problems and upsell products, which will increase sale size and volume, while decreasing customer attrition.

Business Objectives

- Increase sales volume by 40%
- Increase annual sales 40%
- Increase profits 100%
- Decrease the number of customer complaints related to telephone operators' product knowledge by 75%
- Decrease the number of calls that are transferred to customer service supervisors
- Achieve 70% customer retention rate
- Increase average sale from \$250-\$500 to \$300 - \$600 (20%)

Project Deliverables

Call Center Training

- Computer-based training modules
- Asynchronous course in the existing LMS
- Printouts and reference materials

Modules will address the core concerns with the call center: telephone etiquette, customer service, order-taking process, strategies for resolving complaints, and product knowledge training template that can be filled in each season with new products. Deliverables include the source files and job aids.

eCommerce Website

A functional website that customers can use to search the catalog and place orders. PJ Enterprises staff members trained on how to edit and update the website content.

In Scope

Deliverable #1 – Call Center Training

Team 2 Consulting will design and create four user-ready computer-based training modules that can be used for self-paced training by Call Center employees. Each training module will include vignettes or demonstrations as appropriate to the topic and one or more Knowledge Checks. Training modules will be developed on the following topics/items:

- General telephone etiquette
- Order-taking procedures and general process to access product information
- Defusing angry customers/conflict resolution
- Internal problem escalation process
- Training templates for seasonal product training
 - Instructions for populating templates with new products
 - Sample complete templates
 - Other training materials on how to fill in templates for new seasonal products

Deliverable #2 – eCommerce Website

Team 2 Consulting will design and create an eCommerce website for PJ Enterprises for the purpose of selling PJ Enterprise products online.

- Design and build a cloud-based infrastructure solution on the AWS platform to support an online sales presence for PJ Enterprises
- Create processes for uploading and storing existing and new product photos
- Build a scalable and highly available architecture so that the level and associated cost of AWS resources used reflects the current traffic demand from online shoppers
- Build a fault-tolerant architecture that will remain available to customers if a single AWS datacenter becomes unavailable for any reason
- The solution will include a cloud-based database for storing product, customer, and ordering data.
- Design of the customer-facing website
- Linking the web-based ordering system to the on-premises ordering system
- Chat sales and service function

Out of Scope

Deliverable #1 – Call Center Training

The following items are outside the scope of Deliverable #1:

- Training modules on specific product knowledge
- Maintenance/updates to the training materials
- Hardware/software necessary to deliver the training materials

Deliverable #2 – eCommerce Website

The following items are outside the scope of Deliverable #2:

- Training or support for ongoing maintenance of the website
- Ongoing monitoring and security of the website
- Ongoing review of website expense for cost optimization

Project Completion Criteria

Call Center Training

- Training modules reviewed and approved by the catalog director and merchandising manager
- Final files delivered to Call Center Supervisor

eCommerce Website

- Completed infrastructure with current product catalog uploaded
- Quality assurance check and approval
- ADA accessibility test and approval
- Training materials provided that outline the procedures to keep the website up to date
- Website sales integrate with on-site order system

Project Milestones

Milestone (Call Center Training)	Timeframe	Estimated Cost
Analysis	1 week	\$3,600
Design	2 weeks	\$14,400
Development	3 weeks	\$32,000
Implementation	2 weeks	\$14,400
Evaluation	1 week	\$3,600
Final Rollout	3 weeks	\$14,400
	12 weeks	Total: \$82,400

Milestone (eCommerce Website)	Timeframe	Estimated Cost
Planning	2 weeks	\$6,400
Content	1 week	\$3,200
Design	2 weeks	\$6,400
Development	2 weeks	\$12,800
Launch	1 week	\$3,200
	8 weeks	Total: \$32,000

Risks

Risk Area	Low, Medium, or High Likelihood	Risk Owner	Project Impact-Mitigation Plan
Merchandising Manager and/or Catalog Director leaves	Medium	Project Sponsor, PJ Enterprises	Gather and create documentation of processes and decision making carried out by these staff members; Recruit additional PJ Enterprises staff with enough organizational knowledge to assist
Company suffers significant financial losses – project budget decreases	Low	Project Sponsor, PJ Enterprises	Prioritize tasks and expenses; Project how much funding will still be available for how long and adjust plan; Identify low or no cost tasks that can be completed when/if funding is cut off; Maintain project plans and documentation with sufficient detail for continuation at a later date
Member(s) of contracted project team leaves	Low	Project Manager, Team 2	Contracted company will reassign new staff to cover project tasks;

Assumptions

- SME vendors available for 10 hours a week to consult on training development
- Compliance Vendors available for 20 hours a week during Implementation Stage
- Operator Supervisor available for 5 hours a week to review training development
- Catalog Director available for 5 hours a week to review training development
- Instructional Designers available for 30 hours a week to implement adjustments during first 8 weeks
- Compatibility between the online ordering system and the on-premises ordering system
- PJ Enterprises already has an established LMS they currently use for training
- Administrative access to LMS and on-site order system

Constraints

- Training must be ADA Compliant
- Project must be completed in allotted time
- Project budget must be adhered to
- Website must be ADA compliant
- Website must adhere to Consumer Privacy standards

External Dependencies

- Operator facing site that will be used when interacting with customers.
- Deployment of new hire orientation for telephone operators and customer service supervisors by HR

Vendor Assistance Required

- ADA Compliance Consultant
- Website Privacy Consultants
- Product Catalog/Customer Relations SME
- Website Design Vendors

Approvals

Role	Signature	Date
Project Sponsor: Chief Operations Officer, PJ Enterprises		
Project Owner: HR Manager, PJ Enterprises		
Project Owner: Sales Manager, PJ Enterprises		

Scope Management Plan

Introduction

This project is for designing, constructing and testing an ecommerce website for PJ Enterprises customers to make purchases using a web-based ordering system and seek assistance via an online chat function. This includes designing a cloud-based infrastructure that is scalable and fault-tolerant and linking the web-based ordering system to the existing ordering system. This will also include developing processes for updating the website with new products and storing data for existing products, such as photos. The project will involve contracting outside consultants in web design, web privacy, and ADA compliance.

This project also involves designing, developing and evaluating a set of self-paced computer-based training modules on telephone etiquette, taking orders, handling angry callers, and following the internal escalation process. The training will also include templates for self-paced computer-based modules that can be populated with product-specific information as new products are introduced. The project will involve contracting outside consultants in ADA compliance, product catalog design, customer relations and instructional design.

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 and the Work Breakdown Structure (WBS). 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 Project Sponsor for acceptance. Upon approval of scope changes by the 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. 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 duration of the project. The table below defines the roles and responsibilities for the scope management of this project.

Name	Role	Responsibilities
Jane Doe	Sponsor	- Approve or deny scope change requests as appropriate - Evaluate need for scope change requests - Accept project deliverables
Kaylee Griffin	Project Manager	- Measure and verify project scope - Facilitate scope change requests - Facilitate impact assessments of scope change requests - Validate scope change requests - Organize and facilitate scheduled change control meetings - Communicate outcomes of scope change requests to team - Facilitate team level change review process - Update project documents upon approval of all scope changes
Margaret Walker	Team Member	- Participate in defining change resolutions - Evaluate the need for scope changes and communicate them to the project manager as necessary
Patrick Benner	Team Member	- Participate in defining change resolutions - Evaluate the need for scope changes and communicate them to the project manager as necessary
Raphael Macapinlac	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 using employee and customer feedback was performed on the company's current ordering system and process. From this information, the project team developed the project requirements documentation, the requirements management plan, and the requirements traceability matrix for what the ecommerce website and call center training must accomplish.

The project description and deliverables were developed based on the requirements collection process and input from subject matter experts in web design and security, instructional design, ADA compliance, and customer relations. This process of expert judgment provided feedback on the most effective ways to meet the original requirements of providing an ecommerce website, from which PJ Enterprises can increase sale volume and size, and call center customer service training, from which the company can improve customer service ratings, increase sales, and reduce customer attrition.

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 designing, constructing and testing an ecommerce website for PJ Enterprises and designing, developing and evaluating a set of training modules on customer service and new products. The deliverables for this project are 1) an eCommerce website for PJ Enterprises for the purpose of selling PJ Enterprises products online and facilitating online sales and service interactions via live chat and 2) four self-paced computer-based training modules for call center employees on telephone etiquette, order taking, conflict resolution, and escalation, along with a fillable template for product training that can be customized for new catalog items.

The training deliverable will be accepted once the training modules are reviewed and approved by the Catalog Director and Merchandising Manager and once the final files are uploaded to the Learning Management System (LMS) and delivered to the Call Center Supervisor(s). The ecommerce website deliverable will be accepted once 1) the completed infrastructure with the current product catalog is uploaded, 2) the quality assurance check and approval is completed, 3) the site's ADA accessibility has been confirmed, 4) training materials on the procedures to keep the website up to date have been delivered to the Project Sponsor, and 5) it is verified that the website sales system integrates with the on-site order system.

This project does not include ongoing training, administration and maintenance of the ecommerce site or call center training. Specifically, the ecommerce website deliverable will not include ongoing monitoring or security for the website or ongoing reviews of its expenses for cost optimization. The call center training deliverable will not include any materials related to any specific products or the furnishing of the hardware or software required to deliver the training.

Internal personnel and resources, and Team 2 Consulting, Inc. personnel and resources, along with any vendors and subcontractors they deem necessary may be used for this project. Additionally, the project

is not to exceed 90 days in duration or \$115,00 in spending. Assumptions for this project are that support will be provided by the project sponsor and all department managers and that adequate internal resources are available for the successful completion of this project.

Work Breakdown Structure

To manage the work required to complete this project, it will be subdivided into phases and work packages. 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 ecommerce website deliverable is broken down into five phases: planning, content, design, development, and launch. The call center training deliverable is broken down into six phases: analysis, design, development, implementation, evaluation and final rollout. Each of these phases is further subdivided into work packages, each of which will require no more than 40 hours of work and no less than 4 hours of work (see WBS structure below).

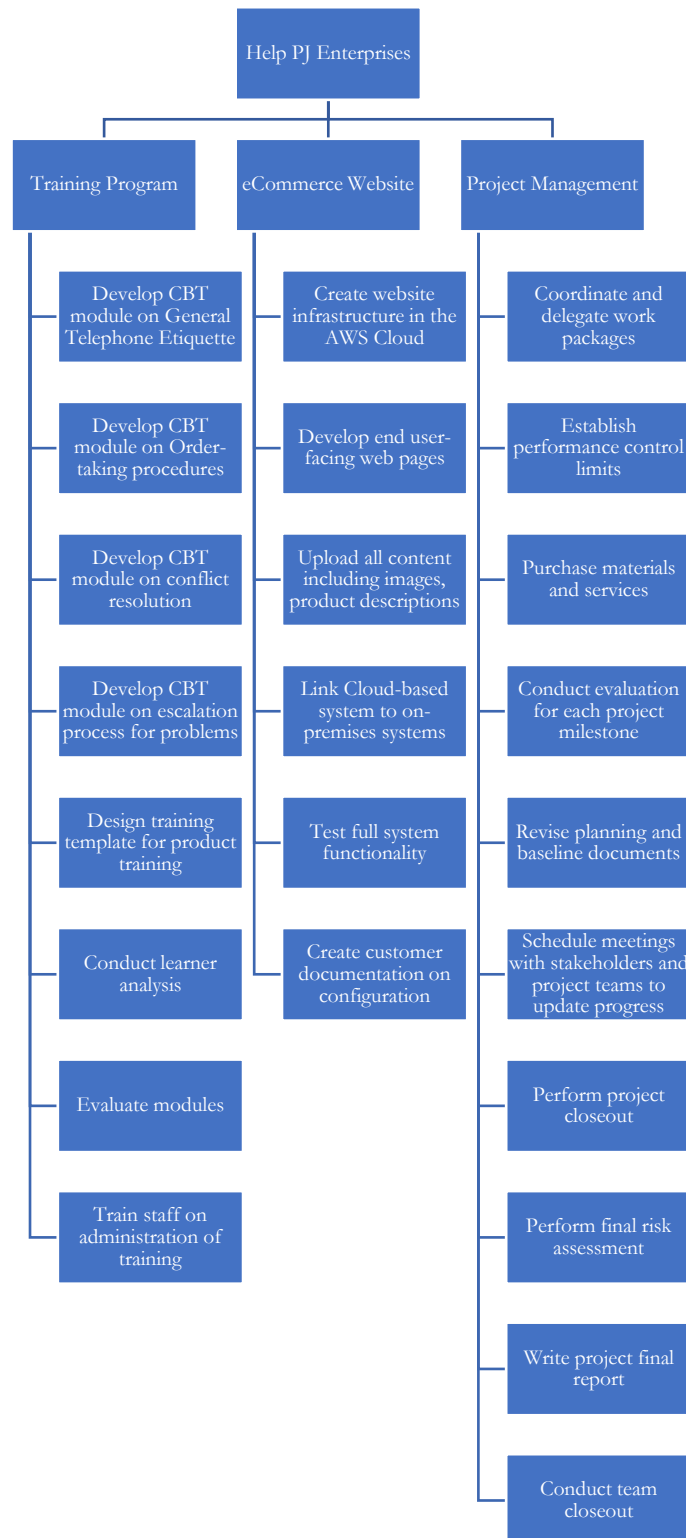


Figure 1.1, Work Breakdown Structure (WBS)

Scope Verification

As this project progresses, the Project Manager will verify interim project deliverables against the original scope as defined in the scope statement and WBS. 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 ensure that they perform only the work described in the WBS 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 is 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. Following a review of the suggested change to the project scope, 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 Project Owners 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 Owners, the Project Manager will then formally submit the change request to the Project Sponsor. If the Sponsor approves the scope change, they will then formally accept the change by signing the project change control document. Upon acceptance of the scope change by the Project Sponsor and Project Owner, the Project Manager will update all project documents and communicate the scope change to all project team members and stakeholders.

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 SharePoint site and project website
Training Project Team Meetings	Review status of the Training project with the team.	• Face to Face • Web Conference	Weekly	• Training Project Team • Vendors (as needed)	Project Manager	• Agenda • Meeting Minutes • Project schedule	• Soft copy archived on project SharePoint site and project web site
eCommerce Site Project Team Meetings	Review status of the eCommerce project with the team.	• Face to Face • Web Conference	Weekly	• eCommerce Project Team • Vendors (as needed)	Project Manager	• Agenda • Meeting Minutes • Project Schedule	• Soft copy archived on project SharePoint site and project web site
Training Project Technical Design Meetings	Discuss and develop technical design solutions for the Training project.	• Face to Face • Web Conference	As Needed	• Training Project Technical Staff	Technical Lead	• Agenda • Meeting Minutes	• Soft copy archived on project SharePoint site and project web site

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
eCommerce Project Technical Design Meetings	Discuss and develop technical design solutions for the eCommerce project.	• Face to Face • Web Conference	As Needed	• eCommerce Website Project Technical Staff	Technical Lead	• Agenda • Meeting Minutes	• Soft copy archived on project SharePoint site and web site
Monthly Project Status Meetings	Report on the status of the project to management.	• Face to Face • Web Conference	Monthly	• PMO	Project Manager	• Slide updates • Project schedule	• Soft copy archived on project SharePoint 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 SharePoint site and project web site

Table 1.2, Communications Management Matrix

Change Request Form

Date:

Project Name:

Date Request Submitted:

Title of Change Request:

Change Order Number:

Submitted by:

Change Category: ☐ Scope ☐ Schedule ☐ Cost ☐ Technology ☐ Other

Description of change requested:

Events that made this change necessary or desirable:

Justification for the change/why it is needed/desired to continue/complete the project:

Impact of the proposed change on:

Scope:

Schedule:

Cost:

Staffing:

Risk:

Other:

Suggested implementation if the change request is approved:

Required Approvals

Name/Title	Date	Approve/Reject

Sponsor Acceptance

Approved by the Project Sponsor:

Jane Doe

Chief Operations Officer, PJ Enterprises

Date: _____

Change Request

December 17, 2020

Project Name: PJ Enterprises

Date Request Submitted: December 17, 2020

Title of Change Request: Add Facilitator Materials and Training

Change Order Number: PJ001

Submitted by: PJE Project Sponsor

Change Category: ☒ Scope ☒ Schedule ☒ Cost ☐ Technology ☐ Other

Description of change requested:

Increase the scope of work to include the creation of a facilitator guide and learner materials to support a face-to-face training option. Increase the scope of work to include a “train the trainer” session for the project team to train facilitators who are PJE key employees.

Events that made this change necessary or desirable:

PJ Enterprises initiated a request to the project management team to add live training option that can be conducted by PJE key staff. The concern by PJE is that operators may continue to underperform after participating in the self-directed learning.

Justification for the change/why it is needed/desired to continue/complete the project:

PJ Enterprises has struggled in previous attempts to improve customer relations skills with its operators. The concern by PJE is that between past performance and the high turnover in the call center, a face-to-face delivery method is also needed. The face-to-face method can be used when onboarding a large group of new employees and for retraining employees who may have participated in the CBT training but still underperform.

Impact of the proposed change on:

Scope: Increase to the project scope to add training documentation and conduct a “train the trainer” session

Schedule: Add 10 business days to the original project end date

Cost: Increase project cost by an additional \$6,000

Staffing: No increase in project staff

Risk: PJE staff who are trained to lead employee training may leave the company

Other:

Suggested implementation if the change request is approved:

Use the slide decks from each of the training modules as the foundation for the facilitator and learner documentation. Use the audio transcript from each slide as the basis for facilitator notes. Use the assessment slides as handouts or discussion topics, depending on the size of the training class and the facilitator’s preference. Project staff will conduct a two-day “train-the-trainer” session with key PJE staff so they can serve as in-house facilitators.

Required approvals:

Name/Title	Date	Approve/Reject
Kaylee Griffin/Project Manager		
PJ Enterprises Project Sponsor		

Scope Verification Form

Project Name	Help PJ Enterprises	Date	December 17,2020
Deliverable(s)	A facilitator guide to support a face-to-face training option. Learner materials including handouts, discussion topics, and training documentation. A “train the trainer” session in which PJ Enterprises employees who will act as facilitators are instructed in best practices for delivering the original training.		
Inspection Results	Upon inspection, this additional deliverable meets the requirements as laid out in the change request form and expansion of the original scope and WBS. The in-person instructor led training is fully complete along with its associated documentation and has been delivered to PJ Enterprises employees.		
The above inspection fully met the deliverable(s) specified in this project’s Scope Statement.			
Executive Approval(s)	PJ Enterprises Executive	PJ Enterprises Executive Signature	
Stakeholder Approval(s)	Project Manager	Project Manager Signature	
Stakeholder Approval(s)	Project Sponsor	Project Sponsor Signature	