# Project Charter for JKKL Consulting

Wednesday, November 18, 2020

## Project Information - KP

### Project Background

Happy Products and More (HP&M) is a mail-order and Internet catalog business marketing high-quality gifts, apparel, and home accessories. In operation for six years, HP&M is seeking to aggressively grow their company while remaining profitable. To reach this goal, they would like to focus efforts on improving the quality of customer service and resulting customer service scores by 10% and improve the quality of the work environment through staff development and recognition.

Management has identified several areas of concern. Employee retention and morale are low. Customer service complaints have increased 30% since the same period in the previous year. In the coming year, HP&M will be updating its current technology including new hardware configurations and equipment. Additionally, new HR policies were recently introduced along with a new company handbook. HP&M has designated a budget of $400,000 to employ JKKL Consulting to assist the company in reaching their determined growth goals through training to address these concerns.

JKKL Consulting conducted a full gap analysis to assess current conditions at HP&M and identified key sources impacting telephone operator performance and customer service. The results of the analysis and recommendations were presented to Jane MacKenzie during a stakeholder meeting in which both parties determined the solutions most appropriate to implement.

### Project Name and Description

The name of this project is Telephone Operator Training. JKKL will deliver on three components of the project for Happy Products & More (HP&M):

* JKKL Consulting will design training for Telephone Operators. The training will be divided into two areas: Customer Services Skills and SimplyOrder System. Each training session will be four hours for a total of eight hours. There will be four main training sessions and one make-up session for each component. The trainings will be instructor-led, provide hands-on practices, and provide instructional and training materials.
  + The Customer Services Skills training will include telephone etiquette, scripts, dealing with difficult customers, addressing complaints, and escalating call to supervisors as needed.
  + The SimplyOrder training will include hands-on practice with the system including locating products and details, completing/cancelling an order, marketing/cross-marketing products and processing returns/exchanges.
  + JKKL Consulting will incorporate Sarah Commons and Maria Gomez into the trainings to watch and lead sessions on their own, with guidance as needed during trainings for Telephone Operators.

### Project Manager

Jeanne Wilson will be the Project Manager for JKKL Consulting on this assignment.

### Project Sponsor

The Project Sponsor for this assignment is Jane MacKenzie of Happy Products & More.

## Description of Work - KP

### Project Purpose

The purpose of this project for Happy Products & More is to provide training for the Telephone Operators and Customer Service Supervisors in conjunction with the SimplyOrder development and implementation phase. The goals are to improve customer service, increase efficiency, and enrich Telephone Operator employee satisfaction.

### Business Objectives

Training the Telephone Operators in areas to include telephone etiquette, customer service skills, marketing skills, specialized product knowledge, and other expertise previously escalated to Supervisors will result in improved customer service satisfaction. That, along with the accurate and consistent product data in SimplyOrder, will increase the speed and accuracy in which the Telephone Operators will be able to respond to customer service questions. In addition, providing guidance for the facilitators/trainers will lead to opportunities for employee growth and further enhance overall employee satisfaction. The updated training, product database, and trainer coaching will enhance employee satisfaction and decrease turnover. These combined updates will help Happy Products & More reach the total sales goal of seven million dollars this year.

### Project Deliverables in Scope

| Solution | Delivery Method | Seat Time or Pages | Description |
| --- | --- | --- | --- |
| Customer Service & SimplyOrder Training Program | Customer Service Training:  Instructor Led  SimplyOrder Training:  Instructor Led & Hands-on Computer Practice | 8 hours total  4 hours for Customer Service  4 hours for SimplyOrder | Customer Service Training:   * Customer service skills * Telephone etiquette * Scripts for common customer engagement tasks * Dealing with difficult customers * Addressing complaints * Marketing products * Cross-selling and upselling products   SimplyOrder Training:   * Hands on practice with SimplyOrder   + Locating products   + Finding product details * Completing an order * Cancelling an order * Processing returns and exchanges |

### Sub-documents in Scope

JKKL Consulting will create the following documents and deliverables to complete training:

* Course Design Document
* PowerPoint slides used during training
* Handouts used during training
* Scripts/job aids used on-the-job as a resource
* Assessment question and answer scenarios
* Role-play scenarios and activities for experiential learning
* Facilitator Guide

### Out of Scope

The following projects are not deemed as part of this scope, but may be revisited later:

* Any materials, guides, or documentation outside that specified above
* Consultation with IT regarding product information layout and screen flow of the database
* Train-the-Trainer Program
* Management Training Program

### Project Completion Criteria

The project will be complete when all specified deliverables, specific to Customer Service Training, and SimplyOrder Training, are signed off and delivered to Happy Products & More management.

## Project Parameters - LF

### Budget

The budget below is an estimate of time and dollars that will be required to complete all the deliverables for Happy Products & More. Given that this numbers are an estimate, they could vary 10% either way, resulting in budgets of $57,600 to $70,400.

| Deliverable /Solution | Type of Training/ Deliverable | Seat Time or Scope Figure | Total Hours Estimated | Rate | Cost |
| --- | --- | --- | --- | --- | --- |
| Customer Service Training Program | 1. Training Reference Handout 2. Facilitator Guide 3. Presentation slides 4. Coaching of HP&M designated trainers 5. Facilitate five sessions classroom training @ 6 hours each (4 hours plus 1 hour set up and break-down per session) | * 4 hours (seat time only) | 190 hours | $200 | $38,000 |
| SimplyOrder  Training Program | 1. Training Reference Handout 2. Facilitator Guide 3. Presentation slides 4. Coaching of HP&M designated trainers 5. Facilitate five sessions classroom training @ 6 hours each (4 hours plus 1 hour set up and break-down per session) | * 4 hours (seat time only) | 190 hours | $200 | $38,000 |
| **Total** |  |  | **380 hours** | **$200** | **$76,000** |

### Project Team Members & Roles

#### JKKL Consulting Team

The table below lists all JKKL Consulting team players, their high-level responsibilities and the hours required for their participation.

| Name | Role | Responsibilities | Est. Hours Needed |
| --- | --- | --- | --- |
| Jeanne Wilson | Project Manager | Oversee all projects, provide tracking and reporting of all tasks and budgets to client; maintain communications. Serve as backup classroom trainer. | 48 hours |
| Katie Pierre | Project Coordinator | Track and schedule all tasks, communicate same to PM and Team. | 32 hours |
| Kelly Dempsey | Business Analyst | Conclude all research, especially detailed task analysis. Serve as backup classroom trainer. | 48 hours |
| Lei Feng & Katie Pierre | Instructional Designer | Create all instructional materials and deliver all training. | 220 hours |
| Kelly Dempsey | Technical Writer | Write training handouts | 24 hours |
| Lei Feng | Visual Designer | Provide all visual design support. | 8 hours |
| **Total** |  |  | **380 hours** |

#### Happy Products & More Team

The table below lists all Happy Products & More team players, their high-level responsibilities and the hours required for their participation.

| Name | Role | Responsibilities | Est. Hours Needed |
| --- | --- | --- | --- |
| Jane MacKenzie | Project Sponsor | Overseeing the project from the client perspective to ensure that it meets her needs; provides input and sign-off on all stages of the project; approves invoices. She has the power to give go and no-go decisions. She signs off on everything from content to strategic decisions. | 48 hours |
| Sarah Commons &  Maria Gomez | Customer Supervisor | Review all training materials and provide feedback. Participate in pilot training. | 120 hours |
| Paula Moore & Rosalinda Sanchez | TO | Review all training materials and provide feedback. Participate in pilot training. | 96 hours |
| Sheena Perez | Merchandising Manager | Provide specific product information for Customer Service Training and provide feedback | 16 hours |
| Ray Johnson | Catalog Manager Assistant | Review product detail database layout and product detail information | 40 hours |
| Sam Fisher | IT | Provide testing workstations equipped with high-quality headsets | 16 hours |
| **Total** |  |  | **392 hours** |

### Project Milestones

| Milestone | Date |
| --- | --- |
| Customer Service and SimplyOrder Design Document signoff | 4/23/2021 |
| Customer Service Facilitator Guide and Instructional Slides signoff | 5/6/2021 |
| Customer Service Pilot training conducted | 5/21/22021 |
| Customer Service Course Revision sign-off | 5/28/2021 |
| SimplyOrder Facilitator Guide and Instructional Slides signoff | 6/20/2021 |
| SimplyOrder Pilot training conducted | 6/25/20201 |
| SimplyOrder Course revision signoff | 6/30/2021 |

### Vendor Assistance Required

JKKL will not require the assistance of an outside vendor. Should Happy Products & More desire to have an outside printer print the handbook and training materials, they are responsible for acquiring the vendor and scheduling and managing that part of the project so that materials are ready in a timely manner.

JKKL is responsible for all graphic work; should they require vendor assistance, they will obtain written permission from Happy Products & More management prior to contracting the work.

JKKL will not require assistance from the SimplyOrder vendor; Happy Products & More management is responsible for providing an order entry expert/SME.

### Assumptions - JW

#### JKKL Consulting is responsible for:

* Design, development, and delivery of agreed-upon products and services.
  + Customer service training
  + SimplyOrder training
* Project management with bi-weekly status reports to Jane MacKenzie.
* Adherence to project milestones (dates and deliverables).

**Happy Products and More is responsible for:**

* Providing training room facilities and equipment.
* IT support for the SimplyOrder system and workstation performance.
* Printing materials, including training handouts facilitator guides, and job aids.
* Providing SMEs and ensuring access to said SMEs by JKKL Consulting.
* Access to the SimplyOrder test system/sandbox.
* Data entry of product information into the SimplyOrder system.
* Scheduling Telephone Operators for training sessions.
* Timely communication of events that might impact the timeline and delivery of agreed-upon products and services.
* Changes in this timeline will impact the training timeline of the customer service supervisors and telephone operators.

### Constraints

These situations will constrain JKKL Consulting’s ability to successfully carry out the project:

* Access to and scheduling time with SMEs who work various shifts, weekends, and holidays, and who have other job responsibilities.
* The IT schedule for development, implementation and “go live” of the SimplyOrder system.
* Holiday closures and time-off which reduce available project worktime for both JKKL and HP&M.

### External Influences/Dependencies

Successful completion of the project is dependent on the following external factors:

* SimplyOrder vendor technical support and compliance with contractual obligations.
* Vendor delivery of product information for the Fall catalog and data entry into SimplyOrder.

## Possible Problems and Risks - KD

| Problem Area | Likelihood 1 – 5 | Problem Owner | Possible Impact to Project | Mitigation Plan |
| --- | --- | --- | --- | --- |
| Delays from vendors in acquiring product data | 5 | Ray Johnson | Product data may not be loaded prior to training on new system. | There will be holes in the available data until complete, but we will load what is available so that attendees will see it at the training. |
| TOs could resist the length of four hours for sessions for CS training, as it was a strong complaint. | 4 | Jane MacKenzie | Reluctant participation can impact the effectiveness of the training. | Develop internal messaging to TOs outlining the positives of the sessions highlighting things such as: “Professional Development”; “Communications Skills”; “Fun and Interactive Activities”; breaks with snacks provided, etc. |
| Availability of features and benefits information on products to build cross-sell/upsell catalog training content | 3 | Ray Johnson | Expertise in merchandising is required to build successful strategic sales content. With Sheena busy handling Judy’s former duties, we will rely on Ray to carefully consider product features that enable sales. | We will notify Ray of our intended new catalog training structure as soon as possible and provide an outline or template so that he can more easily gather high-level product information. We can also look at historical sales data to help narrow the focus of training content. |
| Staff turnover, particularly our Train the Trainer targets, Sarah Commons and Maria Gomez | 3 | Jane MacKenzie | We are tracking Supervisors to take on the role of trainer for future training plans; if there is turnover during the project, selected candidates won’t co-train during the June training. | A facilitator guide will be provided for the Supervisors to use during their training. Future trainer candidates can familiarize themselves with training practices using the guide. |
| SimplyOrder database not complete | 2 | Marge Morehead | Data entry of product information into the new SimplyOrder system needs to be completed prior to the training | There will be holes in the available data until complete, but we will load what is available so that attendees will see it at the training. |
| Technical issues with new system during training | 1 | Tom Swartz/Sam Fisher | The system may not work as expected due to an unforeseen technical issue. | Create a vendor backup plan and company budget allocation for ordering new equipment (computers, headset, etc.) should there be a hardware failure. Refer to the Project Milestones schedule for any possible time constraints from Pilot Training sessions to live launch for planning installation of new equipment. In the event it is discovered that any workstations will be down during training, notify Jane MacKenzie ASAP so she may adjust numbers of trainees in sessions accordingly. |

## Approvals

|  |  |  |
| --- | --- | --- |
| Role | Signature | Date |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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## Stakeholder Assessment – KD – Revised by JW

### Stakeholders Registry

| Stakeholder | Level of Influence | | | Reason |
| --- | --- | --- | --- | --- |
| Hi | Med | Low |
| Jane MacKenzie, Project Sponsor | Hi  Jane is the overseer of the project both internally at HP&M and as liaison to JKKL. She reviews and signs off on all project and training documents. She also garners support from upper management for the project. Jane is the project champion. She can make or break the project. Without her signature, the project does not go forward. Also, she has the authority to kill it. The project needs her full support to be successful. | | | Jane, as project sponsor, is the impetus to launch the project and see it through completion. Without her support, JKKL might not be able to leverage the support needed to implement the solutions to improve customer service, increase sales, and reduce employee turnover. |
| Jane MacKenzie, Tiebreaker | Hi  If a consensus cannot be reached within teams, Jane. MacKenzie will serve as the tiebreaker and make the final determination. | | | Jane will build a strong foundation for her team and future plans in her role as Director of the Call Center. |
| Tom Swartz, Reviewer and Subject Matter Expert | Hi  Tom is responsible for making improvements to the new order entry process. He will provide JKKL with access to the system so they can become familiar with it and prepare for the training.  Tom will review training materials and content for accuracy. | | | Having a streamlined order system will result in increased customer satisfaction due to the increased call speed it would provide, and employee satisfaction from the TOs due to decreased frustrations. |
| Sarah Commons and Maria Gomez, Reviewers and Subject Matter Experts; Train the Trainer Trainees | Hi  These team members will provide information for the content of the training on the subjects of customer service, etiquette with customers, and cross-sell/upsell tips. They will review training materials and content for accuracy.  They will also attend all training sessions and will potentially co-train during the last one or two sessions if they are deemed ready. | | | As key stakeholders in this project, the input provided by these team members will not go unnoticed by management and they will be on track for further career development at HP&M. Success of this project will also result in a more positive, communicative, and supportive work environment for all involved. |
| Telephone Operators, Customer Service Supervisors; target audience | Hi  Telephone Operators and Supervisors will attend one training session. | | | When TOs apply their new skills on the job, HP&M can reach their goals of improved customer satisfaction.  TOs will no longer feel as frustrated with searching for product information as customers become upset and need to be transferred to a supervisor. This will decrease turnover. |
| Jeanne Wilson, Katie Pierre, Kelly Dempsey & Lei Feng: Project Team Members | Hi  We will also conduct an analysis, prepare content, pilot, evaluate, and implement a training aimed at instructing operators on the new system, thus improving customer experience, and advancing sales. | | | JKKL wish for this initial training to be successful for all involved so that they can continue to collaborate with HP&M on further plans for performance improvement.  This first session will lay the foundation for success, and as HP&M’s business expands, JKKL can provide the support structure through training and staff development needed for sustainability. |
| Sam Fisher | Med  Sam will act as our IT contact to prepare the computers in the training room. | | | Successful, glitch-free training sessions will justify the investment the company has made in the training room. |

### Stakeholder Management Plan - KD

The purpose of this project for HP&M is to improve customer satisfaction and retention. It will also serve to increase TO and customer service supervisor employment satisfaction and improve customer service techniques. Our approach will be to create a supportive environment for all stakeholders by taking into consideration the personal WIIFMs. The following stakeholders and their perceived WIIFM are as follows:

|  |  |
| --- | --- |
| Jane MacKenzie | Jane will earn praise from her managers and the potential for advancement in the company. She will be at an advantage to be promoted or receive other potential rewards for her success in her role. The best approach is to collaborate closely with Jane to ensure her feedback is solicited to meet the intended goals. |
| Tom Swartz | Tom will earn the attention from his co-workers and supervisors for his contribution to making this vital change to the success of the company. He will be poised for advancement in his department. The approach with Tom is to recognize his expertise in IT and ensure he understands and addresses the concerns with the current order entry system. |
| Sarah Commons and Maria Gomez | If Sarah and Maria are successful with their Train-the-Trainer tasks, they will likely be promoted to this role. As they will be training their peers, the approach is to coach and provide support so that they feel confident delivering the training. |
| TOs | With new skills, they will be empowered to be successful in their roles, earn promotions, and share in the ultimate goals of the company, which are high-quality, knowledgeable service, and increased sales. The best approach is to provide training that they feel is valuable, recognizing that past trainings have a negative connotation with the TOs. |
| Jeanne Wilson, Katie Pierre, Kelly Dempsey & Lei Feng: Project Team Members | This first session will lay the foundation for success, and as HP&M’s business expands, JKKL can provide the support structure through training and staff development needed for sustainability. |
| Sam Fisher | Sam will build a solid reputation for himself in the IT department if he is associated with a reliable tech environment that facilitates successful training. The best approach with Sam is to work around his schedule in installing the workstations and testing the systems. |