

## Project Change Request

PJ Enterprises Project - Customer Success Advocates

<b>PJ Enterprises – Customer Service Advocates Project Change Request</b>	
<b>Topic:</b> Face-to-face or virtual instructor-led CS-101 Customer Service Advocate Training	
<b>Lesson#</b> N/A	<b>Date:</b> May 5, 2020
<b>Phase:</b>	
<input type="checkbox"/> Analysis <input checked="" type="checkbox"/> Design <input checked="" type="checkbox"/> Develop <input checked="" type="checkbox"/> Implement <input type="checkbox"/> Evaluate	
<b>Change Requestor:</b> Patricia Courtney (Instructional Designer)	<b>Change Request #</b> 3
<b>Change Category</b> (Check all that apply):	
<input checked="" type="checkbox"/> Schedule <input checked="" type="checkbox"/> Cost <input checked="" type="checkbox"/> Scope <input checked="" type="checkbox"/> Resources <input checked="" type="checkbox"/> Testing/Quality <input checked="" type="checkbox"/> ILT/CBT <input checked="" type="checkbox"/> Requirements/Deliverables	
<b>Does this Change Affect</b> (Check all that apply)?	
<input checked="" type="checkbox"/> Training <input type="checkbox"/> Data Collection <input checked="" type="checkbox"/> Contract/SOW <input checked="" type="checkbox"/> Deliverables/Job Aids <input type="checkbox"/> Other	
<b>Describe the Change Being Requested:</b> Modify training delivery methodology from the current state of face to face (ILT) to Computer-based training via CD/DVD.	
<b>Describe the Reason for the Change:</b> The need for consistent telephone coverage would be essential under the original training delivery method outlined in the scope of the project. Creating a CBT would eliminate the need for additional coverage and not impede PJ Enterprises customer satisfaction rating.	
<b>Describe all Alternatives Considered:</b> Paying Telephone Operators overtime to attend training (increased cost) Recruiting coverage from other areas of the business to step in (lacking experience) Hiring temporary employees to be used to cover phones during training (not cost effective)	
<b>Describe any (Possible) Technical Changes Required to Implement this Change:</b> The technology team will need to check the status of the computers to be used for this training for updates and/or upgrades to ensure the audio and video files on the CD/DVD will work and display properly during training. This training will be tracked and documented by issuing a Certificate of Completion added to the employee electronic personnel file.	

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<p><b>Describe any Risks to be Considered for this Change:</b> Increase in budget Talent - Employees technology knowledge, skills and abilities Culture shift Stakeholder commitment</p>
<p><b>Estimated Resources and Costs needed to Implement this Change:</b> Increased cost in the development and design of the CBT and related documents including the creation of CD/DVD to deliver the training. With CBT implementation possible updates/upgrades to technology resources needed to deliver the training to ensure the quality of audio and video are not compromised for an estimated cost not to exceed of \$40,000.00</p>
<p><b>Describe any Implications to Quality:</b> Employee engagement/trust Impact of the training on the customer Changes in project schedule</p>
<p><b>Alternatives and Recommendation:</b> The change in the delivery methodology will provide flexibility in training schedules allowing for the need for additional telephone operator coverage to be at a minimum. Converting this training delivery method to a CBT provides PJ Enterprises the opportunity to provide on demand training to all newly hired telephone operators within days of hire.</p>
<p><b>Disposition:</b></p> <p><input checked="" type="checkbox"/>Approve                      <input type="checkbox"/>Reject                      <input type="checkbox"/>Defer</p>
<p><b>Justification of Approval, Rejection, or Deferral:</b> This CBT will provide the telephone operators a flexible training opportunity without compromising the level of customer satisfaction they are currently delivering. It will require a limited amount of coverage with a minimum, of two Telephone Operators and a Supervisor that will not be available when the training occurs. A CBT will provide new employees immediate training as they begin their new career at PJ Enterprises. In addition to the CBT there are some interactive activities offered that will be optional. All testing will be proctored and taken with other trainees.</p>

## Project Change Request

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<b>Accepted:</b>		
<b>Name</b>	<b>Signature</b>	<b>Date</b>
Jane Smith (Sponsor)	Jane Smith	5/2/2020
John Doe (Project Manager)	<i>John Doe</i>	5/2/2020
Sheena Perez (SME)	Sheena Perez	5/2/2020
Judie Thompson (catalogs Dir.)	<i>Judie Thompson</i>	5/2/2020
<b>Approved:</b>		
<b>Name</b>	<b>Signature</b>	<b>Date</b>
Jane Smith (Sponsor)	Jane Smith	5/2/2020
John Doe (Project Manager)	<i>John Doe</i>	5/2/2020
Sheena Perez (SME)	<i>Sheena Perez</i>	5/2/2020
Judie Thompson (catalogs Dir.)	<i>Judie Thompson</i>	5/2/2020

## PJ Enterprises Project – Customer Success Advocates Agenda

Date: May 6, 2020

Time: 10:00 a.m. – 11:30 a.m. (CT)

### Agenda Items:

- Roll call
- Project Change Request form #3 (CR3) and discussion
- Vote to approve/reject or defer CR3
- Next Steps

### Meeting Minutes:

In attendance:

<b>PJ Enterprises</b>	<b>Team 2</b>
Jane Smith (Sponsor)	Maria Bagshaw (Project Manager)
John Doe (Project Manager)	Patricia Courtney (Instructional Designer)
Sheena Perez (SME)	Dawn Needham (Instructional Designer)
Judie Thompson (catalogs Dir.)	Amy Koshoshek-Winkler (Technical Writer)

The CR3 was discussed at length with the following decisions and outcomes.

- Description of the change being requested: Modify training delivery method from ILT to CBT training via a CD/DVD.
- Reason for the change: The need for consistent telephone coverage would be essential under the original training delivery method outlined in the scope of the project. Creating a CBT would eliminate the need for additional coverage and not impede PJ Enterprises customer satisfaction rating.
- Categories the change will impact: Schedule, Cost, Scope, Resources, Testing/Quality, IL/CBT Training, Requirements/Deliverables, and Contract with Team 2.
- Alternatives and recommendations discussed: The following alternatives were discussed and noted.
  - Paying Telephone Operators overtime to attend training (increased cost)
  - Recruiting coverage from other areas of the business to step in (lacking experience)
  - Hiring temporary employees to be used to cover phones during training (not cost effective)

- Possible technical changes required to implement change: The technology team will need to check the status of the computers to be used for this training for updates and/or upgrades to ensure the audio and video files on the CD/DVD will work and display properly during training. This training will be tracked and documented by issuing a Certificate of Completion added to the employee electronic personnel file.
- Risks and associated costs to be considered for this change:
  - Talent - Employees technology knowledge, skills and abilities
  - Culture shift
  - Stakeholder commitment
  - Increase in budget (rough estimate 150 to 200 hours for 4 hour level-2 CBT). Additional estimated cost not to exceed \$40,000.
- Vote to approve, reject or defer change: Approved change and content in CR3 form.
- Justification of approval: This CBT will provide the telephone operators a flexible training opportunity without compromising the level of customer satisfaction they are currently delivering. It will require a limited amount of coverage with a minimum, of two Telephone Operators and a Supervisor that will not be available when the training occurs. A CBT will provide new employees immediate training as they begin their new career at PJ Enterprises. In addition to the CBT there are some interactive activities offered that will be optional. All testing will be proctored and taken with other trainees.
- Jane Smith (Project Sponsor) signed off and approved the CR3.

**Next Steps:**

- Jane Smith will schedule additional meetings with the appropriate stakeholders to discuss the additional costs and schedule timeline associated with this change and if another Change Request Form is needed.
- The budget and project charter should be revised to reflect the changes. All changes should be communicated to the team members and stakeholders through a Scope Change Log report and/or email. If the scope change request is approved, the changes need to be added to the project to ensure the change is implemented. The budget and project charter should be revised to reflect the changes. All changes should be communicated to the team members and stakeholders through a Scope Change Log report and/or email.

**PJ Enterprises - Customer Service Advocates  
Status Report #7**

**Prepared by: Maria Bagshaw, Project Manager, Customer Service Advocates**

**Date: May 7, 2020**

<b>Project Status</b>	On track with potential risks. Project objectives still within scope.
<b>Summary</b>	This report discusses work progress with regard to the milestones and with the change from an in-person trainer to a computer-based training module at the request of PJ Enterprises. It has been decided by both Customer Service Advocates and PJ Enterprises that this change will benefit both telephone operators and the continued administration of training.
<b>Final Disposition</b>	Final approval was given by the sponsor, project manager and the SMEs to continue with this change. Risks and mitigation have been noted.

<b>Milestone progress or changes</b>	<b>Original date</b>	<b>Revised date (if applicable)</b>	<b>Overview of progress</b>
Instructional design/lesson plan development	6/1-6/20	n/a	This process is on track. The design/development will be slightly changed to accommodate the CBT change request.
Handouts/Student guide/workbook	7/1-7/15	n/a	On track
CBT development	7/30	7/16-8/20	Replace with CBT development Combine PPT/visuals hours and test creation. Hours needed: 150-200 total
Delivery of CBT CD for SME review	9/15	9/1	CD to be delivered for review before training roll out to telephone operators by 9/15

### **Issues & Challenges**

- Potential risk : underestimation of time to program and develop CBT materials and make changes before 9/15 roll out
- Known risk: increases in budget due to development or timing
- Potential risk: need to do extra training for employees on technology

### **Additional notes or highlights:**

Currently advising an estimated \$40,000 increased costs for technology resources and potential extra technology training for telephone operators. This amount has been agreed to by all parties should it be required.

# Scope Verification

## PJ Enterprises

<b>Unit/Program</b>	Operations Call Center (OCC)
<b>Category</b>	Customer Service Advocate Training
<b>Task Knowledge</b>	Task Knowledge, Task Performance
<b>Target Audience</b>	Call Center Telephone Operators
<b>Date Instructional Materials Created or Updated</b>	September 15, 2020
<b>CBT Version Number</b>	20v1.0
<b>Length of CBT</b>	4 hours
<b>Instructional Designers</b>	Dawn Needham, Maria Bagshaw, Patricia Courtney, Amy Koshoshek-Winkler
<b>Subject Matter Expert (SME)</b>	John Doe, Jane Smith, Sheena Perez, Judie Thompson
<b>Instructional Strategies</b>	Lecture, Discussion, Activities
<b>Copyright Information</b>	No copyright materials were used in the creation of this lesson
<b>Pre/Post requisite lessons or Web Based Trainings (WBT)</b>	None
<b>Instructional Materials Approval Name and Date</b>	John Doe <i>John Doe</i> Chief Operations Manager April 20, 2020



# Scope Verification

## PJ Enterprises

### 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.

#### In Scope

This project includes the following items that are considered in scope for this project:

- Face-to-face or virtual instructor-led training that allows for role playing for the telephone operators as customers in order to improve customer service scores.
- Online job aid or product resource guide and/or template designed for consistency of product information so operators can find product information easier.
- The development of an employee incentive program.

#### Out of Scope

The following areas and item are considered out of scope for this project:

- Any type of new hire orientation
- Any training materials not specified above (supervisors or management, etc.)
- LMS or other training system beyond current existing conditions
- Technology and/or software upgrades that house the catalogs.

#### Acceptance Criteria

The project will be considered complete based on the following acceptance criteria:

- Review the project with the team to ensure all project tasks are showing 100% complete.
- Confirm completeness with the team. The team should collaborate at this time to see if something was discussed or promised to someone but wasn't delivered yet and make it right.
- Interview the customer to make sure they accept the project as complete. Review project invoices to make sure everything has been paid. Any outstanding invoices should be discussed at this time. Having a project checklist to present at this time reiterates the work that was done in relation to this project.
- The last step is to obtain official customer signoff showing their acceptance that the project is complete. Stakeholders should be included in this communication, so they know that PJ Enterprises is happy with the solution.

# Scope Verification

## PJ Enterprises

### Project Deliverables

The following items will be delivered for this project:

- Face-to-face or virtual instructor-led training that allows for role playing for the telephone operators as customers in order to improve customer service scores.
- Online job aid or product resource guide and/or template designed for consistency of product information so operators can find product information easier.
- The development of an employee incentive program.

<p>CBT complete and produced on compact disk (CD).</p> <ul style="list-style-type: none"> <li>● Lessons, role plays, activities, and videos, and knowledge checks created with Subject Matter Experts (SME).</li> </ul>	<p>Initials _____</p> <p>Initials _____</p>
<p>Job aids and desk top resources</p> <ul style="list-style-type: none"> <li>● Resources produced and validated by SMEs.</li> <li>● Online tutorials incorporated into lessons.</li> </ul>	<p>Initials _____</p> <p>Initials _____</p>
<p>Employee Incentive</p> <ul style="list-style-type: none"> <li>● Friday afternoon “Kudo’s”</li> <li>● Every Friday “Kudo’s” will be given to operators: Reading of their good customer service comments.</li> <li>● Person to receive the most for the week will receive extra lunch or break time(paid)to use in the upcoming week.</li> </ul>	<p>Initials _____</p> <p>Initials _____</p>
<p>Instructional Designers will return to PJ Enterprises 6 months from today to observe training progress. Designers will offer any observations to PJ Enterprises for improvements (if needed) to the curriculum and/or behaviors.</p>	<p>Initials _____</p> <p>Initials _____</p>

# Scope Verification

## PJ Enterprises

The deliverables have been provided to PJ Enterprises as complete. Signing off on this document signifies that the approving client representative is satisfied with the completed deliverables list above. The client acknowledges satisfactions and completion with all element of the deliverable.

PJ Enterprises Representative: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_

Team 2 Instructional Designer \_\_\_\_\_ Date: \_\_\_\_\_  
Representative (PM): \_\_\_\_\_