

# Project Plan

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## Project Information

PJ Enterprises Call Center Service Delivery Training

### Project Name

Call Center Service Delivery Training

### Version Control

Version	Date	Comments
1.0	11/23/14	Initial document

### Project Description/Overview

We will design and develop a Call Center Customer Service Delivery Session to be delivered by Customer Service Customer Satisfaction Supervisors. The session will include:

- Basic customer service skills to provide customers with a consistent and satisfying experience
- The skills necessary to de-escalate a customer call so the issue can be resolved
- The procedural knowledge to process customer returns

### Project Purpose and Justification

The staff of the Call Center isn't skilled in providing exceptional customer service. They are also in an environment, which is negative and non-supportive. It is contributing to a very high rate of complaints, which is affecting the workload, the efficacy in delivering exceptional service and the ability to meet sales goals. This is an immediate and pressing issue on a number of operational concerns that could make or break the company. Addressing the immediacy of this issue is imperative not only to reduce the level of complaints, but also to retain the customer base, to improve the climate, and to provide the skills, resources, expectations and competencies the front line customer service staff deserve.

## **Business Objectives**

This year PJ Enterprises would like to meet or exceed this year's targets.

- \$7 Million in annual sales
- \$13 Million in Catalog Sales
- \$7 Million from Retail Division
- \$12 Million from acquisitions
- 40% increase in customer lists
- Net Profit of \$2 Million

PJ enterprises would like to see a 10% improvement on customer service scores; although, it is our strong belief that we can significantly exceed this percentage.

PJ Enterprises would like to improve the quality of the work environment for its employees, implement a program for more effective staff development, and create a more relevant staff recognition program.

# Scope Statement

The purpose of this training is to provide the skills and competencies to deliver exceptional customer service in a Call Center environment to both the Customer Satisfaction Representatives/Customer Satisfaction Representatives as well as the Customer Service Customer Satisfaction Supervisors/Customer Satisfaction Customer Satisfaction Supervisors.

## Deliverables Included

The deliverable includes a training module with the following objectives:

- Basic customer service skills to provide customers with a consistent and satisfying experience
- The skill sets necessary to de-escalate a customer call so the issue can be mitigated and/or resolved
- The procedure knowledge to resolve customer's requests to return product returns

The deliverables will also include:

- A class facilitator guide
- A class participant guide
- Job aids to assist the representative with remembering vital information
- A Train the Trainer class to certify the supervisor trainers
- Certification of the supervisor trainers through two classes in which each supervisor co-facilitates a class with a Project Facilitator and two classes in which each supervisor facilitates a class.

The intention is to have all staff trained by mid-January and thus reduce complaints, increase sales, improve the climate and to set forth staff performance expectations that will move the company in the right direction.

## Exclusions

Below are exclusion to what ARBO, Inc. will provide to PJ Enterprises.

- Certifying more than 2 trainers
- Certifying additional trainers after the deliverable
- Updating the course and materials for updates after the deliverable

## Project Completion Criteria

Below are completion criteria for this project.

- A training program is in place to provide the TOs with the skills, competencies and knowledge to effectively respond to customer calls with a minimum need to escalate calls to Customer Satisfaction Supervisors
- A minimum of 2 Customer Satisfaction Supervisors are certified to deliver the Call Center Customer Service Delivery class

## External Dependencies

Below are factors external to ARBO, Inc., but will impact the project.

- The customer base- maintaining and growing it

## Assumptions

Below is a list of assumptions ARBO, Inc. is making prior to initiating this project.

- All stakeholders have been identified
- The supervisor facilitators are on board with facilitating training
- The participants will be allowed the time to attend training
- The supervisor facilitators complete the certification process
- Training facilities will be provided
- PJ will implement an evaluation rubric, holding Customer Satisfaction Representatives accountable to skills learned in the training.
- PJ will implement and maintain an electronic merchandise database.
- If PJ needs assistance certifying trainers in the future, ARBO, Inc. will gladly submit a proposal to offer assistance.
- Key stakeholders will follow through on reviews and suggesting revisions as requested. They will provide their feedback by milestone dates outlined in plan.

# Project Plans

## Constraints

Below are constraints ARBO, Inc. will experience, based on our research.

- The climate in this environment will be a work in progress and will need to be traversed carefully in the initial stages of implementation. There will be growth pains and rough patches. Keeping the focus on how things will improve over time will be something leadership will need to promote. There will also be times when staffing will be short due to all employees attending training. Though this will be addressed, it may still be a factor to consider relative to sufficient coverage.

## Milestones

Below are milestones associated with the development of this course.

<b>Milestone or Activity</b>	<b>Course/Deliverable</b>	<b>Target Date</b>
Phone skills design document and materials for Project Owner Review	Design Document	12/1/2014
Create Facilitator's Guide	Facilitator's Guide	12/11/2014
Create Participant Guide	Participant Guide	1/12/2015
Create Job Aids	Job Aids	1/12/2015
Deliver the Train the Trainer Session	Train the Trainer Session	12/17/2014
Complete delivery of Call Center Customer Service Delivery Session	Call Center Customer Service Course	1/15/2015
Evaluate Training Effectiveness	Training Effectiveness Evaluation	4/20/2015
Deliver Evaluation Report	Analysis Report	4/30/2015
Evaluate Training Effectiveness	Training Effectiveness Evaluation	7/20/2015
Deliver Evaluation Report	Analysis Report	7/30/2015

## Primary Plans

Foresightedness is an important component to effectively plan this project. Formal schedules will be developed and followed to ensure a successful deliverable. Schedules will be developed to manage:

- Resources
- Activities
- Timelines
- Budget
- Quality
- Risk

## Status Reports

Below is a list of status reports and when they will be submitted.

- Project Team Project Status to Project Manager
  - Email Weekly Every Tuesday in a.m.
- PJ Sponsor & Owner Project Status Meeting
  - Bi-Monthly On Thursday Afternoons.
  - Person responsible is Project Manager
- PJ Sponsor & Owner Project Escalations Meeting
  - As Needed
- Project Manager PJ Customer Satisfaction Representatives Training Requirements Meeting
  - Once one month prior to first training
- PJ Customer Satisfaction Representatives Process Change Team Meeting
  - Two meetings; one month and one week prior to first training
  - Project Manager & PJ Management Representative will meet with Customer Satisfaction Representatives
- PJ SMEs and ARBO Project Team Leads to gather information for developing training
  - Meet as needed

# WBS Diagram



# Schedule

Project Schedule					
Start Date	Due Date	Activity	Who	Completion Date	Comments
11/17/14	11/17/14	Assessment Documentation Reviewed			
11/17/14	11/17/14	Review client sample calls	Stephan & Joy		
11/17/14	11/17/14	Review procedures	Stephan & Joy		
11/17/14	11/24/14	Design Document			
11/17/14	11/17/14	Write objectives	Stephan & Joy		
11/18/14	11/18/14	Create Design Outline	Stephan & Joy		
11/19/14	11/19/14	Create Assessment	Stephan & Joy		
11/20/14	11/20/14	Submit design document for SME review	Brenda		

<b>Project Schedule</b>					
<b>Start Date</b>	<b>Due Date</b>	<b>Activity</b>	<b>Who</b>	<b>Completion Date</b>	<b>Comments</b>
11/21/14	11/21/14	SME review and revisions	Sheena Perez, Sarah Commins, Maria Gomez, Paula Moore, and Rosalinda Sanchez, Ray Johnson		
11/24/14	11/24/14	Verify revisions	Stephan & Joy		
11/24/14	11/24/14	Save Document as Final	Stephan & Joy		
11/24/14	12/11/14	Create Facilitator's Guide			
11/24/14	11/24/14	Create PowerPoint slides	Stephan		
11/24/14	11/28/14	Write facilitator guide	Stephan		
11/28/14	11/28/14	Indicate need for flip charts in guide	Stephan		
12/1/14	12/1/14	Submit facilitator's guide for SME Review	Brenda		
12/2/14	12/2/14	SME Review	Sheena Perez, Sarah Commins, Maria Gomez, Ray Johnson		
12/2/14	12/2/14	Verify revisions	Stephan		
12/4/14	12/4/14	Submit facilitator's guide for Signoff from Sponsor	Brenda		
12/4/14	12/11/14	Obtain Signoff from Sponsor	Jane		
1/2/15	1/12/15	Create Participant Guide			
1/2/15	1/2/15	Access ARBO, Inc. Participant Guide Word template	Jean		
1/2/15	1/2/15	Insert course information to align to facilitator guide	Jean		



### Project Schedule

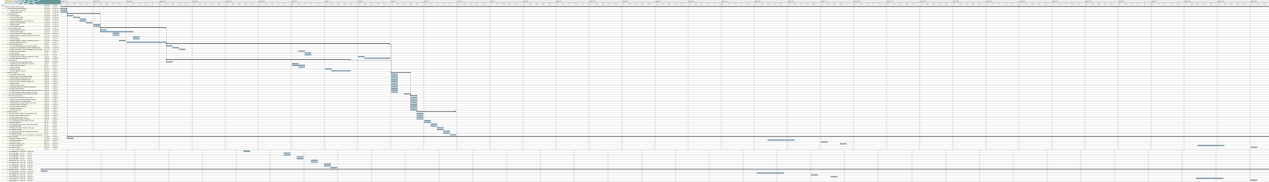
Start Date	Due Date	Activity	Who	Completion Date	Comments
1/3/15	1/3/15	Submit participant's guide for SME review	Brenda		
1/4/15	1/4/15	SME review and revisions	Sheena Perez, Sarah Commins, Maria Gomez, Ray Johnson		
1/5/15	1/5/15	Verify revisions	Jean		
1/5/15	1/5/15	Save Document as Final	Jean		
1/5/15	1/5/15	Submit participant guide for Signoff from Sponsor	Brenda		
1/5/15	1/11/15	Obtain Signoff from Sponsor	Jane		
1/2/15	1/12/15	Create Job Aids			
1/2/15	1/2/15	Create job aid from facilitator's guide	Brenda		
1/5/15	1/5/15	Submit job aids for SME review	Brenda		
11/24/14	11/25/14	SME review and revisions	Sheena Perez, Sarah Commins, Maria Gomez, Paula Moore, and Rosalinda Sanchez, Ray Johnson		
11/25/14	11/25/14	Verify revisions	Brenda		
12/27/14	12/27/14	Finalize Job Aids	Brenda		
12/4/14	12/11/14	Obtain Signoff from Sponsor	Jane		
12/8/14	12/17/14	Pilot Test Course			
12/8/14	12/8/14	Schedule Date and Room	Stephan		
12/10/14	12/10/14	Create flip charts per facilitator guide	Stephan		
12/8/14	12/8/14	SME participants scheduled for class	Stephan		

<b>Project Schedule</b>					
<b>Start Date</b>	<b>Due Date</b>	<b>Activity</b>	<b>Who</b>	<b>Completion Date</b>	<b>Comments</b>
12/10/14	12/10/14	Create participant feedback forms (these will be provided to the participants to note suggestions as the class progresses)	Stephan		
12/15/14	12/15/14	Prepare room, equipment, supplies, etc.	Stephan		
12/16/14	12/16/14	Deliver course	Stephan and Joy		
12/16/14	12/16/14	SME Participants attend	Sheena Perez, Sarah Commins, Maria Gomez, Paula Moore, and Rosalinda Sanchez, Ray Johnson		
12/16/14	12/16/14	Facilitate feedback session with participants	Stephan and Joy		
12/16/14	12/16/14	Gather feedback forms	Stephan		
12/17/14	12/17/14	Evaluate the feedback for possible revisions to course documents	Stephan and Joy		
12/17/14	12/17/14	Make revisions in slides and guides as needed	Stephan		
12/17/14	12/17/14	Save all documents as final with current date	Stephan		
1/23/15	1/23/15	Train the Trainer Session			
1/23/15	1/23/15	Supervisor Trainers attend TTT session	Sarah Commins, Maria Gomez		
1/23/15	1/23/15	Deliver basic adult learning theories training	Jean		
1/23/15	1/23/15	Review how to use facilitator guide	Jean		

Project Schedule					
Start Date	Due Date	Activity	Who	Completion Date	Comments
1/23/15	1/23/15	ABRO facilitators assign teachback to trainers	Jean & Brenda		
1/23/15	1//15	Trainers prepare teachbacks	Sarah Commins, Maria Gomez		
1/23/15	1/23/15	Trainers deliver teachbacks	Sarah Commins, Maria Gomez		
1/23/15	1/23/15	Observe teachbacks	Jean & Brenda		
1/23/15	1/23/15	Provide Feedback	Jean & Brenda		
1/23/15	2/5/15	Deliver Training			
1/23/15	12/23/15	Assign course section to each potential trainer	Stephan		
1/27/15	1/27/15	Gather course materials for class	Joy		
1/23/15	1/23/15	Reserve dates, times and rooms	Joy		
1/23/15	1/23/15	Schedule participants for training	Sarah Commins, Maria Gomez		
1/29/15	1/29/15	Co-facilitate 1st course with 1st trainer	Stephan & Joy & Sarah		
1/29/15	1/29/15	Provide Feedback	Stephan & Joy & Sarah		
1/30/15	1/30/15	Co-facilitate 2nd course with 2nd trainer	Stephan & Joy & Maria		
1/30/15	1/30/15	Provide Feedback	Stephan & Joy & Maria		
2/3/15	2/3/15	Observe 1st trainer facilitate 3rd course	Stephan & Joy & Sarah		
2/3/15	2/3/15	Provide Feedback	Stephan & Joy & Sarah		
2/4/15	2/4/15	Observe 2nd trainer facilitate 4th course	Stephan & Joy & Maria		
2/4/15	2/4/15	Provide Feedback	Stephan & Joy & Maria		
2/5/15	/5/15	Certify the trainers as course facilitators (if applicable)	Stephan & Joy & Sarah & Maria		

Project Schedule					
Start Date	Due Date	Activity	Who	Completion Date	Comments
11/18/14	7/30/15	Evaluate Training			
11/18/14	11/18/14	Decide Evaluation Methods	Brenda, Jean, Stephan & Joy		
4/15/15	4/20/15	Conduct Evaluation	Brenda		
4/27/15	4/27/15	Evaluate Results	Brenda, Jean, Stephan & Joy		
4/30/15	4/30/15	Present Results to Client	Brenda		
7/15/14	7/20/14	Conduct Evaluation	Brenda		
7/27/14	7/27/14	Evaluate Results	Brenda, Jean, Stephan & Joy		
7/30/14	7/30/14	Present Results to Client	Brenda		

**Gantt Chart (Gantt Chart file is attached for better viewing options)**



# Risk Assessment

Below are risks and strategies we will use to mitigate the potential effects of those risks.

Risk	Risk Level L/M/H	Likelihood of Event (1 – low to 5 – high)	Mitigation Strategy
<p>Additional changes in key personnel may negatively impact communication between key parties involved in the call center service delivery training project (e.g., between ARBO personnel and a new SME).</p>	<p>Medium</p>	<p>2</p>	<p>Mitigate this risk by having Stephan work closely with current key personnel, making sure all information from SMEs is documented in order to minimize delays and maintain the flow of communication without interruption. He will assume responsibility for documenting communication with current personnel as well as initiating and maintaining communication with any new key personnel hired during ARBO's work on this project.</p>
<p>A PJ facilitator(s) is not willing or able to participate in the train the trainer sessions and/or pilot test course.</p>	<p>Medium</p>	<p>2</p>	<p>The primary action is to first attempt to avoid this risk by maintaining communication with facilitators to understand and address any concerns that may affect their participation. If this is unsuccessful, then Jean will involve the project sponsor in seeking another facilitator(s) to replace the one(s) who will not/is not able to engage in preparation to become a trainer.</p>

Risk	Risk Level L/M/H	Likelihood of Event (1 – low to 5 – high)	Mitigation Strategy
Scheduling conflicts occur with Maria Gomez due to her working the evening shift.	Medium	4	Mitigate this risk by assigning Joy to adjust her schedule as needed to work with Maria Gomez. This will involve Joy scheduling a planning meeting with Maria on 12/1/2014 to set firm dates and times for training to occur with Maria. At this time, it will be determined how to ensure Maria receives the same quality of training and support from ARBO along with accommodation for her work schedule. This may involve Joy conducting training on the evening shift, working with the project sponsor to arrange days off for training for Maria, recording the daytime training for Maria to review, etc.
Delay in signoff during any of the three major milestones puts the training delivery behind schedule.	High	3	To mitigate this risk, Brenda will work closely with the project sponsor. This will involve telephone and email communication to follow-up on delivery of items for signoff, to clearly state the deadlines for signoff, and to contact the sponsor if the signoff is not received by the deadline. If the signoff is delayed due to problems with the deliverables, Brenda will work with the appropriate team member to resolve the issue as quickly as possible.
SME reviews and revisions of the job aids are not delivered on 11/21/2014, which could delay finalization of the job aids.	Medium	2	The primary means of mitigating this risk is for Brenda to maintain communication with the SMEs, including stating the delivery due date and addressing the issue if the due date is not met. In the event that only partial revisions are received from SMEs and there is a risk of finalization not occurring on 12/2/2014, Brenda will first attempt communication with the SMEs who have not met the deadline. If this is unsuccessful, she will verify the revisions that have been received and submit them for signoff.

<p>A room for the pilot test course is not available on 12/17/2014.</p>	<p>High</p>	<p>2</p>	<p>First, Stephan will attempt to prevent this risk by scheduling a room early on 12/8/2014. If no room is available on-site for the training date, then Stephan will first communicate this to the project manager and sponsor to see if priority can be given to training classes. If no on-site room can be made available, he will then attempt to find an off-site room that can be rented so that training is not delayed.</p>
<p>A room for the train the trainer session is not available for the scheduled training delivery date.</p>	<p>High</p>	<p>2</p>	<p>First, Jean will attempt to prevent this risk by scheduling a room one week prior to training. If no room is available on-site for the training date, then Jean will first communicate this to the project manager and sponsor to see if priority can be given to training classes. If no on-site room can be made available, she will then attempt to find an off-site room that can be rented so that training is not delayed.</p>
<p>Rooms for call center service delivery training are not available on the scheduled training delivery dates.</p>	<p>High</p>	<p>2</p>	<p>Stephan and Joy will follow the same mitigation plan of first scheduling on-site rooms in advance, escalating the need for rooms to the project manager/sponsor, and as a last option, renting off-site rooms. The priority is to make sure that training is delivered on schedule.</p>
<p>A PJ facilitator becomes unable to facilitate a call center service delivery course.</p>	<p>High</p>	<p>2</p>	<p>The primary plan for mitigating this risk is to stay in communication with the PJ facilitators and the project sponsor. Stephan and Joy will request immediate communication from the project sponsor regarding any termination of facilitators or other actions that could prevent them from conducting the training courses. They will also request immediate communication from facilitators if they are unable to conduct training due to personal reasons. The primary objective is for training to be delivered, so as a last course of action to prevent failure of the delivery, Stephan or Joy will deliver the training course for the facilitator who is absent.</p>

# Change Management Plan

## Purpose

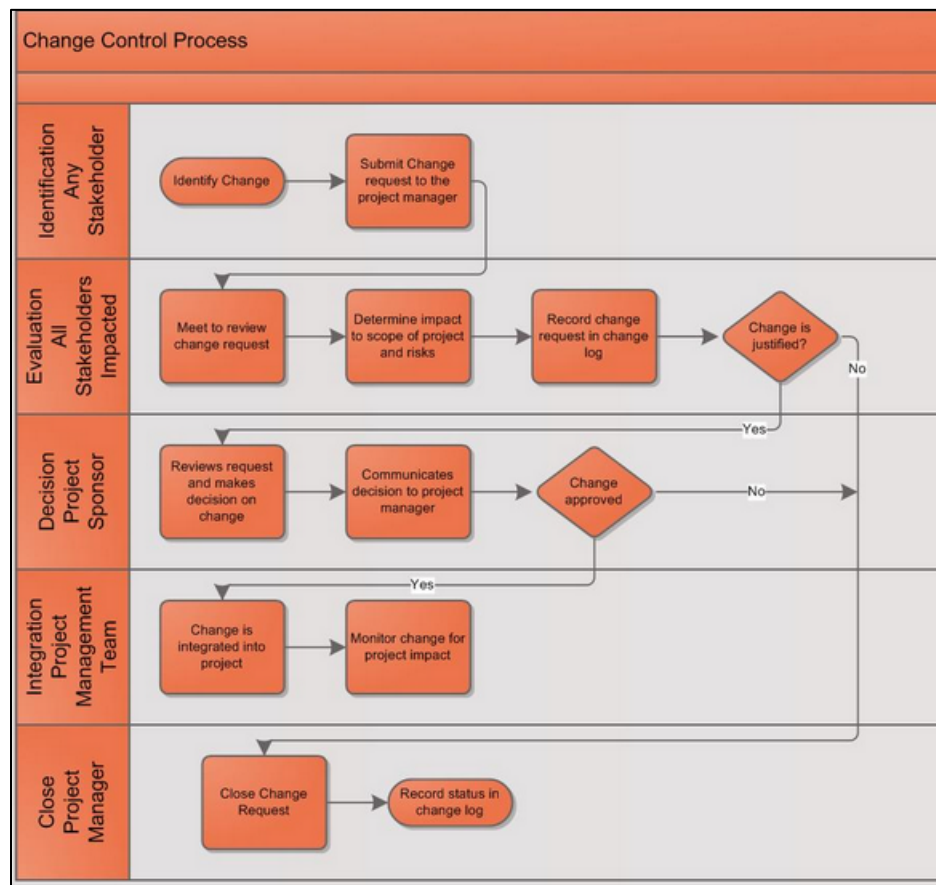
The Change Management Plan provides structure to the change requests impacting the project.

## Goals

The Change Management Plan will provide a mechanism in which change requests can be evaluated and tracked while maintaining control of the scope, budget and schedule of the project plan.

## Change Control Process

For each change requested the following process will be followed:





## Responsibilities

Below is a list of responsibilities and those who are responsible for them.

<b>Person Responsible</b>	<b>Responsibilities</b>
Project manager	Review change, determine feasibility and provide recommendations, track change status
Sponsor	Approve, reject or modify request
Project Team	Incorporate changes into deliverables in a timely and effectively maintaining project quality
Any Stakeholder	Identify and communicate change request

# Communication Plan

## Communication Objectives

The communication objectives are to communicate scope, purpose, process and benefits of the Call Center Customer Service Delivery Training to PJ Enterprise employees.

## Communication Principles

The communication principles are listed below.

- Communication will be delivered based on ARBO, Inc. core values. The communication will be delivered in an honest, straightforward manner.
- All audience members will be provided communication in a manner in which they will be able to understand the concepts and processes.
- The communication will be delivered in a timely manner so employees will be prepared for the training and process changes.

## Change Implications

- How will using the new method(s) differ from what employees are used to doing?
  - Providing efficient, comprehensive and skilled customer service, the Call Center will operate more effectively. Less time will be utilized addressing complaints and more time will be devoted to setting forth and carrying out expectations that will serve the business operational goals for PJ Enterprises.
- What practices have to change?
  - Lengthy call times should become a thing of the past
  - Customer Satisfaction Representatives need to be able to access product information efficiently and be adept at efficiently providing appropriate information about the products.
  - Customer Satisfaction Representatives need to be able to provide excellent service and understand how to mitigate complaints.
  - Customer Satisfaction Customer Satisfaction Supervisors need skilled in coaching, training and leading in a Call Center environment.
  - Customer Satisfaction Representatives need to be more available to their staff.
  - The company needs to purchase equipment for their staff.
  - Employees should be paid to attend work-related meetings.
- What behaviors have to change?
  - Customer Satisfaction Representatives need to shorten their call times.
  - Customer Satisfaction Representatives need to stop contributing to behaviors that result in customer complaints.
  - Employees need to respect one another as well as handling the customer service process with respect towards the customer and their time.

- Customer Satisfaction Supervisors need to be skilled in understanding what the delivery of exceptional service is in a Call Center environment, be willing to set an example, and available to train and coach their staff.
- What expectations have to change?
  - How the company develops, administers and communicates the expectations will need to be redesigned and implemented with regularity.
  - Staff will be aware of what the job expectations are and when they have questions, will have the leadership available to them to provide what is needed for them to perform their jobs.
- Describe how employees can participate in and even shape the change through communication?
  - Regular staff meetings.
  - Open lines of communication with facilitation when necessary.
  - Quarterly performance reviews until the expectations are demonstrated and implemented to the level that is necessary.
- Clearly outline the reason for change to help audience understand why they being asked to do what they are being asked to do.
  - To ensure PJ Enterprises can stay in business, these changes are critical and essential. A company can't operate and continue to stay in business when there are this many complaints, and staff aren't clear what is required and necessary to do their jobs effectively.

## Target Audiences and Key Messages

Below are all audiences that will be affected by the project and the key messages we have for each of them.

Audience	Key Messages
All Call Center Staff	The Call Center Staff will know the project is going to make their jobs better. They will be more efficient, which will increase customer satisfaction, which will in turn help to make PJ prosper and become a driving force in the industry.
Project Team	The Project Team will be involved throughout the entire project, As issues arise, the team will have input on corrective measures to address those concerns.
PJ Project Sponsor	The project sponsor will be up to date on all aspects of this project at any given time.

## Challenges and Opportunities

Below is a list of challenges and opportunities as a result of developing this course.

<b>Audience</b>	<b>Challenge</b>	<b>Message to address challenge</b>	<b>Method or Channel</b>	<b>Responsible</b>	<b>Date</b>
Customer Satisfaction Representatives	Resistant to the expectation of managing product return calls instead of transferring the calls	The training will provide them with the necessary skills for them to effectively and efficiently resolve these calls	Face-to-Face meeting	Sponsor and Customer Satisfaction Supervisors	1/21/2014 1/15/2015
Supervisor Training SMEs	Apprehension that they will not be able to effectively facilitate training	Confidence that the Project team will provide them with the skills needed to successfully train the Customer Service Telephone Skills class	Face-to-Face meeting	Project Management Team & Sponsor	11/21/2014
Customer Satisfaction Supervisors	Concern that Service levels will not be met while training events are conducted	Assurance that training events will be scheduled to minimize the impact to service levels.	Email	Sponsor	11/21/2014
Sponsor	Concern about the project's progress	Information and updates about the project's progress including honest disclosure of issues and risks	Face-to-Face Meetings	Project Manager	Bi-weekly On-going throughout the time of the project

# Project Plan Approvals

## Approvals

Name	Role	Signature	Date
Jane Mackenzie	Project Sponsor		
Mike Merrill	Project Collaborator		
Brenda Armstrong	Project Manager		