

Help Desk Project Charter

By:

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Project Management 410

University of Wisconsin-Stout

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| Project Contact and Approval Information | | | |
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| Project Name/Number | | Educational Software | |
| Sponsoring Organization | | Educational Software | |
| Project Sponsor | | Name: John Barton Phone: x1001 Office Address: Office 20 123 Educational Software Ln. Email: john.barton@someeducationalSoftware.com | |
| Project Leader | | Name: Oscar Ocampo Phone:x1002 Office Address: Office 30 123 Educational Software Ln. Email: Oscar.Ocampo@someeducationalSoftware.com | |
| Team Members (Name) Title/Role Phone Email | | | |
| Jan Edwards | Customer Service Supervisor | x1005 | Jan.Edwards@someeducationalSoftware.com |
| Dan Samuels | Technical Support Supervisor | x1006 | Dan.Samuels@someeducationalSoftware.com |
| Cindy Kline | Human Resources (HR) | x1007 | Cindy.Kline@someeducationalSoftware.com |
| Linda Peters | Finance Rep | x1008 | Linda.Peters@someeducationalSoftware.com |
| Rich Evans | Legal Advisor | x1009 | Rich.Evans@someeducationalSoftware.com |
| 5 existing Customer Service Reps | | | |
| 4 existing Testing & Tech Support Reps | | | |
| Principle Stakeholders Title/Role Phone Email | | | |
| John Barton | CEO | x1001 | john.barton@someeducationalSoftware.com |
| Jan Edwards | Customer Service Supervisor | x1005 | Jan.Edwards@someeducationalSoftware.com |
| Dan Samuels | Technical Support Supervisor | x1006 | Dan.Samuels@someeducationalSoftware.com |
| Linda Peters | Finance Rep | x1008 | Linda.Peters@someeducationalSoftware.com |
| Date Chartered:10/18/2011 | | Project Start Date: 10/3/2011 | |
| | | Target Completion Date: 2/20/2011 | |
| Revision: 1.0 | | Date: | |
| Sponsor Approval Signature: | | Date: | |
| Updates & Approval Log | | | |
| Revision | Date | Sponsor Approval Signature | |
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| 1.0 | BUSINESS ANALYSIS |
| 1.1 | <p>Business Problem/Opportunity</p> <p>What is the problem? Customers are provided with technical help documentation in a hard copy and electronic format with the purchase of the company’s product but there is no technical assistance offered.</p> <p>What is the real problem? The company has not established a Technical Support Helpdesk for customers to call in with technical problems or answering questions via the Internet.</p> <p>Whose (who-all’s) problem is it? The project will involve the Test & Technical Support department along with Human Resources.</p> <p>Where does the problem come from? Customers aren’t familiar with mechanics of the product enough to able to solve them through the available hard copy documentation.</p> <p>Why do we want to solve the problem? Provide technical solution to customers as well as increase customer satisfaction to maintain company’s mission.</p> |
| 1.2 | <p>Project Scope/Objective</p> <p>The goal of this initiative is to develop and establish a Technical Support Helpdesk within company facility to expand support services for clients and customers.</p> <hr/> <p>In Scope:</p> <ul style="list-style-type: none"> • Plan the entire installation and deployment of the new system in addition to Technical Support operation and facility construction • Purchase and install new system. • Hire additional staff. • User training of all technical and customer support staff. • Special technical training for one telephone and one technical support staff member. • Testing and trial of the new system with “safe” customers. • On-going maintenance and support of the system. <hr/> <p>Out of Scope:</p> <ul style="list-style-type: none"> • Include computers for new Helpdesk staff • Training for school/home customers • Software updates • Revision of current technical support material • New furniture or equipment for new employees • Expansion of facility space walls that would make the total facility larger |

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| 1.3 | <p>Benefits & Potential Value(s):</p> <p>This project will include many benefits including:</p> <ul style="list-style-type: none"> • Improve overall customer support services • Improve hardware technology • Increase web activity with Internet-base Helpdesk • Expand physical facility • Increase staff members • Single, central system for data • An efficient triage (all-in-one) for customers, decrease lead time • Possibility of providing on-site/off-site training to customers <p>Potential values include:</p> <ul style="list-style-type: none"> • Customer referrals • Increase company's reputation |
| 1.4 | <p>Impacts of Doing Nothing – Internal to the Business</p> <p>Company will not expand and does complement its mission to satisfy customers. This may lead to diverse agreement among different departments and causes mistrust among each other.</p> <ol style="list-style-type: none"> 1. High stress in employees due to the increase of responsibilities 2. Mistrust amongst employees because of the decrease of customer satisfaction 3. Production cost may increase due to time spent on answering customers questions regarding technical support. |
| 1.5 | <p>Impacts of Doing Nothing – External to the Business</p> <p>Customer will seek alternative solution due to a lack of customer support and technical assistance. The reputation of the company customer service will decrease which discourages new customers.</p> |

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| 2.0 PHASES & MAJOR DELIVERABLES | |
| 2.1 | <p>Deliverables</p> <p>Installation and deployment of the new system and the Technical Support operation including:</p> <ul style="list-style-type: none"> • Interactive Voice Response (IVR) system • Implement Helpdesk knowledge-base/ticketing system (triage system) • Implement Online Helpdesk support • Staff training (offside and onsite) • Project documentation • Negotiation of ongoing maintenance contract • Establish communication with customers via new system • Remodeling of facility to accommodate Helpdesk |

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| 2.2 | <p>Activities (list in sequence order if known)</p> <ol style="list-style-type: none"> 1. Identify team for project from testing and HR department. 2. Identify problems and resources need for maintaining Helpdesk 3. Seek staff and department support for Testing & Technical Support <ol style="list-style-type: none"> a) Seek to hire 4 additional staff to accommodate Helpdesk 4. Renovate Technical Support facility at the location of unused storage area 5. Work with Norstan telephone services to install new system 6. Implement knowledge-base system 7. Implement staff training of adopted technology 8. Install remaining components of Helpdesk 9. Complete documentation of process 10. Pilot system with test group 11. Launch Helpdesk |
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| 3.0 PROJECT VITAL SIGNS | |
| 3.1 | <p>Overview of Schedule</p> <ul style="list-style-type: none"> • Requested Start: October 3rd 2011 • Required Delivery: February 20th, 2012 • Timing Concerns: Project start was slightly delayed. There may be issues with staff availability with the holidays (Thanksgiving, Christmas, and New Years) |
| 3.2 | <p>Assumptions / Dependencies</p> <p>Assumptions: The additional staff will be hired. The right staff will be hired to fit the role of the helpdesk.</p> <p>Dependencies: The IRV phone project will be complete. The storage space will be renovated and ready to go for the project.</p> |

3.3 Risks, Likelihood, Consequences, and Contingency Plans

| #1 | #2 | #3 | #4 | #5 | #6 |
|--|--|--------------------|---------------|----------------------------|-------------|
| <i>Risk Number (1,2,etc.) & Brief Description of Risk</i> | <i>Risk Event Description (what could happen)</i> | <i>Probability</i> | <i>Impact</i> | <i>Severity / Response</i> | <i>Rank</i> |
| 1. Staff Turnover | The loss of key staff members could severely impact the project schedule | Medium | High | High | 1 |
| 2. Technical Glitches | Major technical problems could delay the project being completed according to schedule | Medium | High | High | 2 |
| 3. Operating System or Service pack release affecting the educational software | Staff would be moved from the project to support the business needs | Low | High | Medium | 3 |
| 4. Infrastructure may not support the new technology such as the enhanced website or helpdesk software | Infrastructure problems could delay or cause budget overruns for the project | Low | High | Medium | 4 |

| #1 | #1 | #3 | #4 | #5 |
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| <i>Rank of Risk</i> | <i>Risk Number (1,2,etc.) & Brief Description of Risk</i> | <i>Risk Event Description (what could happen)</i> | <i>Risk Response Strategy (can have more than one action per risk if needed)See Example below:</i> | <i>Risk Alarm (trigger) & Risk Action Owner</i> |
| 1 | 1. Staff Turnover | The loss of key staff members could severely impact the project schedule | Strategy: Mitigate through Cross Training Action: Train staff on multiple areas so they could assume different roles. | Staff leave positions |
| 2 | 2. Technical Glitches | Major technical problems could delay the project being completed according to schedule | Strategy: Accept Risk With any project it is probable that there will be some technical glitches during implementation. The implementation schedule has built in extra allowances | Monitor the tasks and ensure they are being completed. |
| 3 | 3. Operating System or Service pack release affecting the educational software | Staff would be moved from the project to support the business needs | Strategy: Accept Risk Since this is a small company, it is not able to control when third parties release new software | Review information on new releases and upgrades for the core products |
| 4 | 4. Infrastructure may not support the new technology such as the enhanced website or helpdesk software | Infrastructure problems could delay or cause budget overruns for the project | Strategy: Transfer Risk Cloud based solutions could be used to as a hosting option. | Performance degradation on critical systems |

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| 3.4 | <p>Major Quality Assurance Reviews and Roles</p> <p>Throughout the project the stage gate process will be used. Reviews will be conducted with the stakeholders after each gate to review the progress and ensure everything is complete. During the project a few customers will pilot the new helpdesk model and surveys will be conducted to ensure that it is meeting the needs of the clients and the staff is comfortable with the changes.</p> <p>Planning: November 1st 2011 Executing: January 13th 2012 Controlling: February 13th 2012 Closing: February 27th 2012</p> |
| 3.5 | <p>Estimated Labor Costs (size, range of Hours)</p> <p>Total of 4400 hours broken down by department:</p> <p>Customer Service Department 1400 hours</p> <p>Testing an Tech Support 2000 hours</p> <p>HR 200 hours</p> <p>Legal 400 hours</p> <p>Finance 400 hours</p> |
| 3.6 | <p>Estimated Non-Labor Costs</p> <ol style="list-style-type: none"> 1. IVR Phone System \$50,000 2. Knowledge Base system \$500 3. Helpdesk Ticket tracking software (Open Source) |
| 3.7 | <p>Interdependencies with Other Projects</p> <p>No specified other projects however</p> <ol style="list-style-type: none"> 1. Ongoing software development compatibility testing 2. Hardware failures and infrastructure refreshes 3. OS and Service Pack releases affecting product compatibility |
| 3.8 | <p>Functional Areas Impacted by Request</p> <p>Customer Service, Testing and Technical and Support, Human Resources, Finance, Legal Customer Service: Jan Edwards Testing and Technical and Support: Dan Samuels Human Resources: Cindy Kline Finance: Linda Peters Legal: Rich Evans</p> |

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| 4.0 | Project Staffing |
| 4.1 | <p>Project Staffing and Time Commitments</p> <ul style="list-style-type: none"> • Customer Service Supervisor (\$40/hr) – Jan Edwards • Technical Support Supervisor (\$45/hr) – Dan Samuels • Human Resources (HR) Rep (\$30/hr) – Cindy Kline • Finance Rep (\$35/hr) – Linda Peters • Legal Advisor (\$100/hr) – Rich Evans • 5 existing Customer Service Reps (\$25/hr) • 4 existing Testing & Tech Support Reps (\$40/hr) • Norstan Rep (non-employee, external, fee included in package) – Frank Giles – Special Resource • 8 Staff in the Testing and Technical Support will working 50% on testing and 50% on tech support • Interactive Voice Response system approximately 250,000 (total package of hardware, software, and installation. • Tech Support renovation = \$50,000 • Select 4-6 position |
| 4.2 | <p>Special Resources Needed (We've listed these, but just to inform us again of some)</p> <ul style="list-style-type: none"> • Computers for help desk • Entire installation and deployment of the new system and the Technical Support operation. • Technical Support function will need a physical area to be created within the existing facility |
| 4.3 | <p>Project Organization (Roles & Responsibilities)</p> <ul style="list-style-type: none"> • CEO - John Barton is one of the main investor/financer in this project • Customer Service Supervisor – Jan Edwards is responsible for making sure the triage system works and making sure the employees are equipped with what's needed to assist customers and clients. • Project Manager- Oscar OcampoTavera is responsible for making sure the project is going according to plan, meeting deadlines and the stocker holders are happy with the progress. • Technical Support Supervisor – Dan Samuels is responsible for answering any questions employees have on assisting customers and clients technical issues. • Human Resources (HR) Rep – Cindy Kline is responsible for hiring and training additional employees to work in the Testing & Technical Support • Finance Rep – Linda Peters is responsible for making sure the equipment and costs are paid accordingly to the budget. • Legal Advisor – Rich Evans is responsible for making sure the new equipment, renovations and software are in compliance with the state and federal laws. • 5 existing Customer Service Reps are responsible for answering calls and answering questions customers have pertaining the software. • 4 existing Testing & Tech Support Reps are responsible for testing and making any necessary updates to the software to meet customers' needs. • Additional 4 more Testing & Tech Support Reps are being trained and then placed in the department to work with other representatives |

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| 5.0 | Project Management Approach |
| 5.1 | <p>Approach</p> <p>Conference room 158 will be use as the Game Room (War Room). This room is accessible to everyone. A discussion board will be place on this room for everyone working on the project to write any problems, suggestions and concerns to be discussed during the meetings.</p> <p>During the planning, controlling and closing phases, the team will meet every day at 11:30 at the Game Room during the planning face to discuss any events on the discussion board.</p> <p>During the first 3 weeks of executing we will meet at 7 am and 1 pm to address any problems or questions that will come up during this phase of the project.</p> <p>After these 3 weeks we will meet again once a day at 11:30 to evaluate the progress of the project.</p> <p>All decisions will approved by consensus. If agreement is not reach by the end of the meeting the project leader will make the final decision.</p> <p>MS Project 2010 will be used to set and measure against the project timelines. A daily action check list will be kept to record everyone’s progress.</p> <p>The initial time line is set in a 5 day working week; overtime on weekends or nights will be used if needed to meet projects deadlines.</p> |
| 5.2 | <p>Status or Progress Reporting Plan</p> <p>A standing item in the agenda for all the meetings will be designated to internal communication for the week.</p> <p>The minutes from these meetings will be distributed every Friday to all stakeholders.</p> <p>Jan Edwards and Dan Samuels will communicate progress to the rest of the staff during their schedule team meeting.</p> |
| 5.3 | <p>Change Management Approach</p> <p>Any changes need to be approved and signed off in the revised charter.</p> <p>Project change form request form needs to be completed and submitted to Oscar Ocampo.</p> <p>A cost benefit analysis is required before approving any changes.</p> <p>If changes will cost more than \$1000 in time, resources, or labor; changes will need to be approved by project sponsor. If these changes are less than \$1000 project manager will be able to make this decision.</p> |