**MIS 4596**

**Project Charter**

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| ***Project Title*** | Enhance Functionality for Third-Party CRM Users | ***Product/Process Impacted*** | Login Features |
| ***Start Date*** | ***08/31/2018*** | ***Organization/Department*** | Temple University- CRM Implementation Team |
| ***Target Completion Date*** | ***12/04/2018*** | ***Champion*** | Vitris Management |

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|  |  | Description | | | | | | | | | | | | |  |
| **1. Project Description** |  | Vitris clients need to consolidate and simplify customer interactions by implementing a member platform for sales, billing, customer service and field service requests. Currently, Vitris clients communicate with customers using email and web forms. Customers must re-enter their contact information each time they visit a client’s site. Additionally, Vitris clients must forward the customer request to the appropriate department prior to handling. By providing clients with a member platform, their customers can perform a variety self-service tasks, as well as gain greater insight into their purchases and client communication. Customers will be able to enter their own information into the CRM databases, reducing Vitris clients’ administrative workload. This new feature will expand Vitris’ current product offering, enabling them to deepen the relationships they have with existing clients. | | | | | | | | | | | | |  |
| **2. Project Scope** |  | What areas are inside and/or outside the work of the team? What are the boundaries (start and end points)? What specific parts of the overall problem will you focus on?  The process begins when the customer signs into the client website.  The process ends when the customer receives notification that their request has been handled, an appointment has been scheduled, or when the customer leaves the client website with the information they needed.  Customer interactions that occur outside of the membership platform (phone, email, text, in-person) are out-of-scope. | | | | | | | | | | | | |  |
| 1. **Project Goal and Deliverables**   What must the team deliver to be successful? Does the team goal link to the key performance parameters established by the sector leadership teams? What is the baseline performance? How will the goal be measured? | | | | |  |  | **Metrics** (propose specific metrics for your project, e.g., cost reduction, time reduction, customer satisfaction, etc.) | | **Baseline** | **Current** | | **Goal** | |  | |
|  | | | | |  |  | **Reduce Customer Inquiries by 70%** | | **1000 per month** | **1000 per month** | | **300 per month** | |  | |
|  | | | | |  |  | **Increase Customer Satisfaction Rating** | | **6 out of 10** | **6 out of 10** | | **9.5 out of 10** | |  | |
|  | | | | |  |  | **Reduce Client Data Entry by 40%** | | **15000 fields per month** | **15000 fields per month** | | **9000 fields per month** | |  | |
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| **4. Business Results Expected** | | |  | Increased clients. Deeper development of existing clients. Higher contractual rates for Vitris. Increased Profit Margins. | | | | | | | | | | | |  |
| **5. Team members** | | |  | Who is this team accountable to? Who is your champion? Who is on this team? What are the specific skills/roles of each team member? Who can the team turn to for expert guidance?   |  |  | | --- | --- | | Professor Aleksi Aaltonen: | Steering Committee | | Vitris Management: | Champion | | Ariana Castaneda: | Project Manager 1, Process Modeling | | Sarita Cini: | Project Manager 2, Data Modeling, Prototyping | | Chandni Antala: | Status Updates, System Architect | | Fatimata Sall: | Status Updates, Financial Analyst | | | | | | | | | | | | |  |
| **6. Support Required and risks** | | |  | What additional resources does the team need? What obstacles does the team see, and how can they be resolved?  Risk: Ensuring data integrity in database using customer-entered data. Handle by coordinating between Vitris CRM and customer-facing site to ensure field option sets are consistent.  Risk: Vitris’ client-base is currently very broad which could make our feature set too generic to be marketable.  Risk: User adoption on client and customer sides. Work with Champion to ensure support of project is communicated | | | | | | | | | | | |  |
| **7. Customer Benefits** | | |  | How will this project help the customer of the organization? Could improvements have a negative impact on the customer?  Customer’s will have more efficient contact-points and will be empowered to use company resources themselves.  If there is poor user-adoption, the customer will be impacted negatively because they will have an additional, but unreliable way of communicating with Vitris clients. It could put too much impetus on customers to help themselves and take away some of the | | | | | | | | | | | |  |
| **8. Technology Architecture** | | |  | What are the specific tools/technologies you will be using? What is the experience of team members with these tools?  Databases, Web Forms, Workflows, Email integration- Entry-Level experience | | | | | | | | | | | |  |
| **9. Overall schedule/Work Breakdown Structure** (Key milestones & dates) | | | | | | **Responsible**  **individual** | | **Output (notes, diagrams, interviews, screen prints)** | | | **Date started if in progress**  **Or Expected completion date** | | **Date completed or date completion is expected** | | |
| Planning | | | | | | Sarita Cini | | Project Plan,  Risk assessments, Meeting Reservations, Stakeholder information | | | 08/31/18 | | 09/13/18 | | |
| Analysis | | | | | | Ariana Castaneda | | Diagrams, Interviews, Requirements, | | | 9/13/18 | | Continuous throughout project | | |
| Design | | | | | | Sarita Cini | | Prototype, Diagrams, Use Cases | | | 9/13/18 | | 10/2/18 | | |
| Implementation: Construction | | | | | | Chandni Antala | | System Architecture, Training | | | 10/2/18 | | 10/23/18 | | |
| Implementation: Testing | | | | | | Chandni Antala | | Test Cases, Unit Testing, | | | 10/23/18 | | 11/27/18 | | |
| Installation | | | | | | Fatimata Sall | | Wrap Up, User sign-off | | | 11/27/18 | | 12/4/18 | | |

**Charter Development Guidelines:** Examples are in *italic*s. You can expand the form to meet your requirements as you enter text.

**Project Title**: Enter the name for your project – the name should convey a sense of purpose. Should contain an action word; such as – improve, develop, implement, reduce, etc.

*Reduce Cycle Time for Resolving Disability Disputes*

**Product/Process Impacted**: What you are working on.

*Disability Claim Process*

**Champion:** The sponsor of the project.

*Department Head*

**Organization:** Where you work.

*Corporate HQ – Shared Services*

**Start Date:** This is the first day on the project.

**Target Completion Date:** This is depending on the negotiated time line and scope with the sponsor.

1. **Project Description:** Several sentences addressing: why you are undertaking this project, the magnitude of the problem, general approach to be taken and expected benefits.

The Shared Services Benefits Group receives on average 30 claim appeals per month. Many of these are resolved by providing information clarifying the process and others should have been handled locally or by directly working with the service provider. This project will improve the process currently in use so that calls/claims are resolved quicker. This will allow members of this organization to focus on more strategic issues and will improve client satisfaction and eliminate re-work.

1. **Project Scope:** What the boundaries are of the process that you are going to be working on.

This "Process" begins with opening of a claim dispute and ends when the disputed claim case being closed.

1. **Project Goal:** Describe the target(s) that you are planning to achieve. Reduce cycle time by 50%, reduce cost per computer installation by 50% etc. If you don’t have a quantifiable target then you cannot claim that you have reached your goal.

Include the historical baseline information. The current value for the process will be updated as the project progresses toward your goal.

*For cycle time: Baseline- 2 days, Current- 2 days, Goal- 1 day (the goal reflects the 50% reduction from baseline)*

*For cost: Baseline- $1000, Current- $800, Goal- $500 (the goal reflects the 50% reduction from baseline)*

You may have other metrics that you are working to impact; if so, substitute them for any that don’t apply. You may have only one metric and will rarely have more than three.

1. **Business Results:** What the benefits are to your organization when this project is complete. How will this project impact your organizations “Dashboard” metrics? What will be the impact to the financial bottom line?
2. **Team Members:** List the dedicated team members and also any other regular contributors to the success of the project.
3. **Support Required:** Identify other resources that may be required, such as outside consultants etc.
4. **Customer Benefits:** What the benefits are to the customers of this project if the process/product is improved.

*The people using the claims dispute process will get faster results and resolution of their claim. This should result in better customer satisfaction levels with the process as well as improved productivity of service operators through fewer status inquiries.*

1. **Technology Architecture:** What are the tools you will be using (development tools, data base, etc)? How will you obtain the tools? What is the level of experience of specific team members with these tools?
2. **Schedule:** Enter the anticipated dates that you will complete each phase of the project; work with your champion to determine these dates.