**MIS 4596**

**Project Charter**

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| ***Project Title*** | Enhance Functionality for Merchants | ***Product/Process Impacted*** | Customer Membership Platform |
| ***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 merchants need to consolidate and simplify merchant-customer interactions by implementing a member platform for sales, billing, customer service and field service requests. Currently, Vitris merchants 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 merchants must forward the customer requests to the appropriate department prior to handling. By providing merchants with a member platform, their customers can perform a variety self-service tasks, as well as gain greater insight into their purchases and merchant communication. Customers will be able to enter their own information into the CRM databases, reducing Vitris merchants’ administrative workload. This new feature will expand Vitris’ current product offering, enabling them to deepen the relationships they have with existing merchant as well as bring in new clients. | | | | | | | | | | | | |  |
| **2. Project Scope** |  | 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** | | | | |  |  | **Metrics** | | **Baseline** | **Current** | | **Goal** | |  | |
|  | | | | |  |  | **Reduce Customer Inquiries by 70%** | | **100 per month** | **100 per month** | | **30 per month** | |  | |
|  | | | | |  |  | **Increase Customer Satisfaction Rating** | | **6 out of 10** | **6 out of 10** | | **9.5 out of 10** | |  | |
|  | | | | |  |  | **Reduce Merchant Data Entry by 40%** | | **150 fields per month** | **150 fields per month** | | **90 fields per month** | |  | |
|  | | | | |  |  | **Increase number of acquired customers** | | **5% increase** | **5% increase** | | **15% increase** | |  | |
| **4. Business Results Expected** | | |  | Increased merchants. Deeper development of current merchants. Higher contractual rates for Vitris. Increased Profit Margins. Higher customer retention. | | | | | | | | | | | |  |
| **5. Team members** | | |  | |  |  | | --- | --- | | Professor Aleksi Aaltonen: | Steering Committee | | Vitris Management: | Champion | | Ariana Castaneda: | Project Manager 1, System Architecture | | Sarita Cini: | Project Manager 2, Data Modeling, Prototyping | | Chandni Antala: | Status Updates, Financial Analyst | | Fatimata Sall: | Status Updates, Process Modelling | | | | | | | | | | | | |  |
| **6. Support Required and risks** | | |  | 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’ merchant-base is currently very broad which could make our feature set too generic to be marketable.  Risk: User adoption on merchant and customer sides. Work with Champion to ensure support of project is communicated. | | | | | | | | | | | |  |
| **7. Customer Benefits** | | |  | Customers will have more efficient contact-points and will be empowered to use merchant 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 merchants. It could put too much impetus on customers to help themselves and take away some of the relationship building opportunities from Vitris | | | | | | | | | | | |  |
| **8. Technology Architecture** | | |  | 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 | | | | | | Ariana Castaneda | | System Architecture, Training | | | 10/2/18 | | 10/23/18 | | |
| Implementation: Testing | | | | | | Chandni Antala, Ariana Castaneda | | Test Cases, Unit Testing, | | | 10/23/18 | | 11/27/18 | | |
| Installation | | | | | | Fatimata Sall | | Wrap Up, User sign-off | | | 11/27/18 | | 12/4/18 | | |