Project Playbook

Project Management Portfolio Piece

Team 3

December 14, 2021

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Gap Analysis

Project Name: Project Playbook	Team Responsible: Team 3

Narrative Summary of the Case Study:

PJ Enterprises is a mail-order catalog company that has operated for the past six years. The company has been profitable this year, and the business wants to continue to grow while maintaining a focus on quality, customer service, the work environment, and staff development. Survey data reveal issues with customer service, including telephone operators' lack of product knowledge, telephone etiquette, and responsiveness to calls. As a result, senior management believes a learning program or training might help achieve the business's objectives for the upcoming year. These goals include improving customer service scores and increasing sales within the company.

Performance Issue #	Current State (As-Is)	Implications of the As-Is.	End Goal (To-Be)	Vision for Bridging the Gap (How)	Est Timeline
1	**Customer service** Customer survey figures indicate an increase of 30 percent in customer complaints with the telephone operators as compared to the same period last year.	This problem will only build on itself if not addressed. Increasing complaints will only increase customer and operator dissatisfaction, ultimately resulting in loss of brand trust and revenue as well as a loss of product knowledge as employees turn over.	Focus on quality and customer service with 10 percent improvement on customer-service scores. Decrease call answer time to no more than 2 minutes.	*Mandatory:* **Telephone Etiquette training.** Provided at onboarding and periodic refresher training. *Encouraged:* **Customer Service certification training.** This will improve operator customer service skills and also promote job satisfaction with a new skill set they can add to their resume. A certification would provide more incentive to learn than mandatory training.	Before the next catalog release.
2	**Morale** More than half of the telephone operators are dissatisfied with their jobs and would consider leaving.	A decrease in the morale of operators will result in high turnover, costing money for hiring, training, expertise, manpower, and time.	Increase job satisfaction of telephone operators by 25%.	Creating an option to improve their customer service skills may help build their perceived value and improve their morale. Communicate new policies and product training in ways that	Policy changes effective immediately.

		Will also result in additional customer service mistakes, impacting the customer service performance issue.		won't interfere with the employee's free time. Provide paid training and meetings during normal working hours. Hold additional focus groups to hear directly from operators regarding issues, and, along with data from exit interviews, prioritize the aspects of the job that are most dissatisfying.	
3	**Training** Current telephone operator training consists of a half-day of product training via PowerPoint delivery by management.	Telephone operators will continue to struggle with product knowledge which will feed the poor customer service problem.	Improved telephone operator product training occurring before the next catalog release, not delivered by management.	Create an interactive series of learning objects that can be both presented in person and accessible on LMS for refresher training. This training will use gamification and badges will be unlocked after the learner completes different product type familiarization and other learning achievements. Operators can use achievement badges as a way to display their expertise and foster healthy competition to become Subject Matter Experts. Additionally, consider dividing operators into broad product teams to divvy up product knowledge. Use customer call and LMS metrics to focus creation of training development and job aids on popular products.	Before the next catalog release
Not implicitly stated as needing improvement					
4	**HR Policies** HR recently introduced new policies to include performance and self-evaluation processes, an	The method of delivery for the new HR policies may be a contributor to high telephone operator turnover. A lack of employee buy-in or collaboration on the policies	Fully implement new HR policies and provide training for employees.	Training: Evaluation and Pension plan training should be in person or virtual instructor-led when possible. This type of training usually has a lengthy Q & A	TBD Needs more information.

	employee handbook, and a better pension plan.	also contributes to high job dissatisfaction. More information is needed to make an assessment.		session. Guidebook and supplemental training for other policies can be learning objects on the LMS.	

Project Charter

November 8, 2021

Project Information

Project Name Project Playbook

Project Sponsor/Owner [Redacted]

Stakeholders	
______, Project Sponsor	______, Customer Service Subject Matter Expert (SME)
______, Project Owner	______, Training Facilitator
______, Catalog Director	______, Project Manager
______, Merchandising Manager	______, Project Team Member
______, HR Manager	______, Project Team Member

Business Case

PJ Enterprises, a mail-order catalog company, has operated for the past six years and wants to continue to grow while maintaining a focus on quality, customer service, the work environment, and staff development. Recent data have indicated a 30% increase in customer complaints with the telephone operators as compared to the same period last year. In addition, HR recently introduced new policies, including performance and self-evaluation processes, an employee handbook, and a better pension plan. This project intends to help the company achieve its increased sales goal by improving telephone operator customer service skills through training as well as providing training and a guidebook for policies.

Business Objectives

Training:

The primary goal of this project is to improve customer service scores by 10%. Included in the project deliverables are one instructor-led training on customer services skills and an Operator Telephone Etiquette handbook. Increasing the level of customer service skill among operators will help PJ Enterprises meet this year's targets: $7 million in annual sales, $13 million in catalog sales, and an additional net profit of $2 million dollars.

Non-training:

The primary goal of this project is to fully implement new HR policies. Included in the project deliverable is one HR handbook. Providing a centralized handbook for HR policies will help increase operator job satisfaction by 25%, decreasing turnover and customer service complaints.

Project Deliverables

Three project deliverables will be provided to PJ Enterprises upon completion of this project.

- One in-person Instructor-Led Training (ILT) module
- Operator Telephone Etiquette handbook
- One HR Policies handbook.

In Scope

Team 3 will:

- Manage the project
- Conduct needs analysis
- Design, develop, implement, and evaluate one in-person ILT module including Operator Telephone Etiquette handbook, and one HR Policies handbook
- Provide material-related support for 1 year after completion of the project.

Although they fall under the same project, the Operator Telephone Etiquette and HR policies have separate milestones.

Out of Scope

Team 3 will NOT:

- Provide an instructor to facilitate the ILT
- Provide funding for any part of the project
- Identify personnel to be stakeholders or SMEs
- Provide a location for project-related activities
- Provide support after the negotiated period
- Provide technology or software for this project
- Perform telephone operator or customer service work
- Support project changes without renegotiating the project contract

Project Completion Criteria

The following conditions must be met in order for the project sponsor to sign off on the completion of the project:

- All deliverables have been handed off
- Instructor-Led Training has been conducted with a minimum operator pass rate of 80%
- Post-training evaluation survey results show an increase of employee satisfaction by 25%
- Post-training customer satisfaction survey shows a decrease of customer complaints by 10%
- Training material support procedures have been officially instituted.

Project Milestone

Milestone (Deliverable #1)	Date	Estimated Cost
Needs Analysis Document	11/29/2021	$6000
Design Document	12/06/2021	$6000
Facilitator Guide	12/13/2021	$3000
Etiquette Handbook	12/17/2021	$3000
Developed Training	01/03/2022	$12000

Instructor-Led Facilitation	01/17/2022	$1500
Post Training Evaluation	01/31/2022	$6000
Support Period	02/01/2022	$6000
		Total: $43,500

HR Policies Handbook

Milestone (Deliverable #2)	Date	Estimated Cost
Needs Analysis Document	11/15/2021	$3000
Design Document	11/22//2021	$3000
1st Draft/Prototype	12/03/2021	$6000
Draft Revisions	12/10/2021	$3000
Final Draft	12/17/2021	$6000
Final Sign-off/Approval	12/22/2021	-
Implementation	01/01/2021	$1500
		Total: $22500

Risks

Risk Area	Low, Medium, or High Likelihood	Risk Owner	Project Impact-Mitigation Plan
Resignations of Project Team Member	Low	HR, Project Team	Project Team requests for a replacement to take over as soon as possible.
Pandemic	Medium	PJ Enterprises	Follow guidance from state and local Health Departments.
Systems or Equipment Failure	Low	PJ Enterprises	Confirm with PJ Enterprises the functionality of equipment prior to training.
Funding	Medium	PJ Enterprises	The Project Team will review contract terms.

Assumptions

This project will commence under the following assumptions:

- We have access to a sponsor designated Subject Matter Expert for 5 hours per week for the duration of the project.
- We will be given access to authoring tools and systems with which we will create the deliverables, if access cannot be granted, we will be given an equivalent allowance to provide our own.
- We will be given access to all prior data to include operator phone logs, surveys, evaluations, and metrics related to Customer Service and HR Policies.
- We will be given access to the facilities and technology needed for this project.
- We will have access to paper and commercial printers for the creation of both handbooks and other handouts.

Constraints

- The project will commence with the following constraints:
- Access to funding may affect the budget of the project.
- ADA compliance will be required and may constrain the design and delivery decisions.
- Human Resources requirements and employee rights may affect access to and dissemination of information, employee and SME participation, and method of training delivery.
- Time may constrain and dictate the progression of the project.

External Dependencies

The project will commence with the following external dependencies:

- A facilitator/trainer/instructor will need to be provided externally, as the Project Team will not be providing a facilitator/instructor for the training delivery.
- Space to conduct the training will also need to be provided from an external source.

Vendor Assistance Required

No vendor assistance is needed for this project.

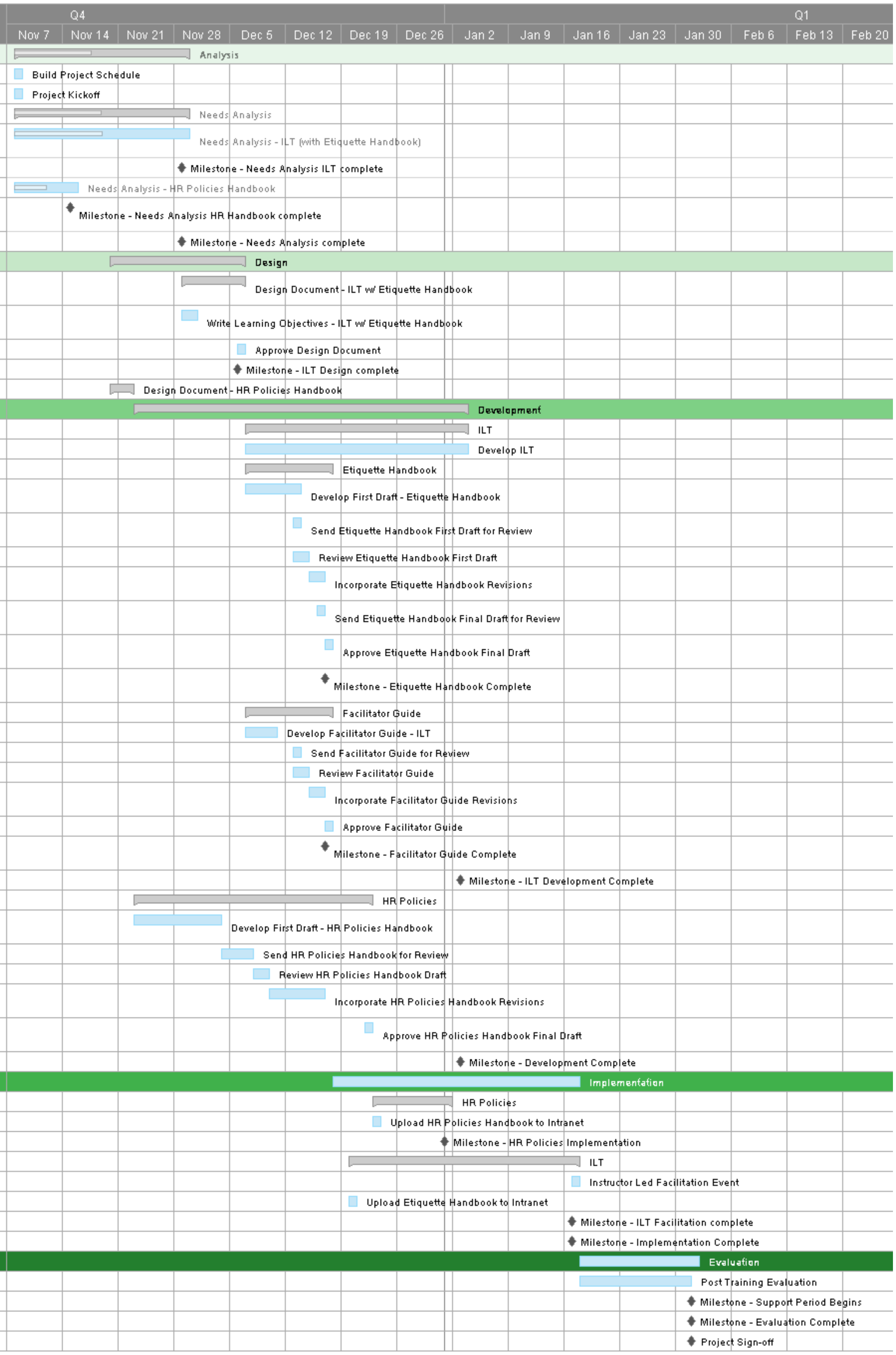
Approvals

Role	Signature	Date

Project Management Plan

Work Breakdown Structure

Project Schedule



	Task Name
1	**Analysis**
2	Build Project Schedule
3	Project Kickoff
4	Needs Analysis
5	Needs Analysis - ILT (with Etiquette Handbook)
6	Milestone - Needs Analysis ILT complete
7	Needs Analysis - HR Policies Handbook
8	Milestone - Needs Analysis HR Handbook complete
9	Milestone - Needs Analysis complete
10	**Design**
11	Design Document - ILT w/ Etiquette Handbook
12	Write Learning Objectives - ILT w/ Etiquette Handbook
13	Approve Design Document
14	Milestone - ILT Design complete
15	Design Document - HR Policies Handbook
18	**Development**
19	ILT
20	Develop ILT
21	Etiquette Handbook
22	Develop First Draft - Etiquette Handbook
23	Send Etiquette Handbook First Draft for Review
24	Review Etiquette Handbook First Draft
25	Incorporate Etiquette Handbook Revisions
26	Send Etiquette Handbook Final Draft for Review
27	Approve Etiquette Handbook Final Draft
28	Milestone - Etiquette Handbook Complete
29	Facilitator Guide
30	Develop Facilitator Guide - ILT
31	Send Facilitator Guide for Review
32	Review Facilitator Guide
33	Incorporate Facilitator Guide Revisions
34	Approve Facilitator Guide
35	Milestone - Facilitator Guide Complete
36	Milestone - ILT Development Complete
37	HR Policies
38	Develop First Draft - HR Policies Handbook
39	Send HR Policies Handbook for Review
40	Review HR Policies Handbook Draft
41	Incorporate HR Policies Handbook Revisions
42	Approve HR Policies Handbook Final Draft
43	Milestone - Development Complete
44	**Implementation**
45	HR Policies
46	Upload HR Policies Handbook to Intranet
47	Milestone - HR Policies Implementation
48	ILT
49	Instructor Led Facilitation Event
50	Upload Etiquette Handbook to Intranet
51	Milestone - ILT Facilitation complete
52	Milestone - Implementation Complete
53	**Evaluation**
54	Post Training Evaluation
55	Milestone - Support Period Begins
56	Milestone - Evaluation Complete
57	Project Sign-off

Communication Matrix

The following table identifies the communications requirements for this project.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Kickoff Meeting	Introduce the project team and the project. Review project objectives and management approach.	• Face to Face • If pandemic conditions preclude in-person meeting, we will do a Conference Call	Once	• Project Sponsor • Project Team • Stakeholders	Project Manager	• Agenda • Meeting Minutes	• Soft copy archived on project Google Drive
Project Team Meetings	Review the status of the project with the team.	• Face to Face • Conference Call	Weekly	• Project Team	Project Manager	• Agenda • Meeting Minutes • Project schedule	• Soft copy archived on project Google Drive
Instructional Design Meetings	Discuss and develop technical design solutions for the project.	• Face to Face • Conference Call	As Needed	• Project Team	Instructional Design Lead	• Agenda • Meeting Minutes	• Soft copy archived on project Google Drive
Monthly Project Status Meetings	Report on the status of the project to management.	• Face to Face • Conference Call	Monthly	• Project Team	Project Manager	• Slide updates • Project schedule	• Soft copy archived on project Google Drive
Project Status Reports	Report the status of the project including activities, progress, costs, and issues.	• Email	Monthly	• Project Sponsor • Project Team • Stakeholders	Project Manager	• Project Status Report • Project schedule	• Soft copy archived on project Google Drive

Change Request Procedure

PJ Enterprises values growth, and in order to grow, change is required. The change management process involves the request of a change presented to leaders in the company who will then discern if the change is warranted and how to manage it appropriately. Often, these leaders ensure that the change is impactful, beneficial, and effective.

The “Change Request Form” found on the following page offers a method for the client and team members, who recognize an opportunity for project improvement, to express a needed change and the advantages for making the change. The client or team members must complete and submit the “Change Request Form” to the Project Manager and Decision Maker.

The Project Manager will determine the impact of the proposed changes on the project cost and schedule and evaluate any risks associated with the change request. In addition, the Project Manager will assign a number to keep track of the number of change requests. Both the Project Manager and Decision Maker will provide a sign-off on it. If the change request is approved, the Project Manager will communicate with all stakeholders and ensure all documents are revised as needed.

Change Request Form: https://www.projectmanager.com/templates/change-request-form

CHANGE REQUEST FORM

Change Description		
Project Name:	Change Name:	Number:
Requested By:	Contact:	Date:
Description of Change:		
Reason for Change:		
Priority [Circle One]: 1. High 2. Medium 3. Low		
Impact on Deliverables:		
Impact of Not Responding to Change (and Reason Why):		
Date Needed:	Approval of Request:	Date:

Change Impact
Tasks/Scope Affected:
Cost Evaluation:
Risk Evaluation:
Quality Evaluation:
Additional Resources:
Duration:
Additional Effort:
Impact on Deadline:
Alternative and Recommendations:
Comments:

Sign Offs	
[Circle One]: 1. Accepted 2. Deferred 3. Rejected 4. More Info Requested	
Comments:	
Project Manager Signature:	Date:
Decision Maker Signature:	Date:

Instructional Design Document

Project Name:	**Project Playbook**
Prepared by:	**Team 3**
Date:	**November 28, 2021**

Purpose:

The purpose of this training is to build the Telephone Operator's customer service skills and telephone etiquette at PJ Enterprises. The Instructor-Led Training and Telephone Etiquette Handbook will provide Operators with the hard and soft skills they need to improve the customer experience and job satisfaction.

Target Audience:

Primary Audience

- Telephone operators

Secondary Audience

- Management and Team Leads

General learner characteristics and prerequisite knowledge:

General Learner Characteristics

- **Count:** 25 operators total
- **Gender:** Evenly split between male and female
- **Age:** 22-50 years old
- **Race:**
  - 75% - White,
  - 5% - African-American,
  - 2% - Hispanic or Latino,
  - 3% - Asian or Pacific Islander,
  - 15% - mixed race/other
- **Education:** High School Diploma - Master's Degree
- **Average Tenure:** 1 year

Prerequisite Knowledge

- Basic computer literacy, including Office Suite, email, etc
- Basic customer service skills
- Basic phone skills, including multi-line experience
- Product catalog knowledge

Application of learning theory:

The training is supported by Malcolm Knowles' theory of andragogy. During the hands-on portion of the training, the adult learners will apply and practice telephone skills and customer service skills. This learning experience will help them gain confidence in their practical skills before they encounter actual situations. Any facilitators of the training will explain why the participants need to learn the content and relate the topic to their immediate job responsibilities.

Training format:

The training will be in-person, instructor-led training and supplemented with the Telephone Etiquette Handbook.

Learning Environment:

The training will take place in the company training classroom which is big enough to accommodate all learners.

1. Terminal Objective: Given the Standard Operating Procedures (SOP), telephone operators will be able to demonstrate customer service procedures with 100% SOP compliance.			
Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Telephone operators will implement a standard greeting or script as a guide for each phone call.	Lecture: Operator Script	Assessment: Knowledge check matching customer input with correct operator response.	Discussion: Operators give real-world examples of "going off script" and how that impacted the call experience.
Telephone operators will apply account security measures.	Lecture: Account Security Procedures	Assessment: Knowledge check: Operators are verbally drilled on account security measures.	Discussion: Operators discuss the repercussions of poor security measures.
Telephone operators will process call escalations as needed.	Lecture: Redirect Procedures	Assessment: Q&A session: The class is presented with a short series of questions (scenarios) and must discuss the appropriate actions to take.	Training Aid: Operators are provided with a hard copy of the Standard Operating Procedures created by the company.
2. Terminal Objective: Given a customer service call, telephone operators will correctly solve a customer's issue 4 out of 5 times using appropriate telephone etiquette.			
Enabling Objectives	Absorb Activity	Do Activity	Connect Activity
Telephone operators will apply proper telephone etiquette techniques, including responsiveness, appropriate tone, and active listening.	Lecture: Telephone Etiquette Techniques	Assessment: Role-play: The operator will apply telephone etiquette techniques in a live, role-play simulation.	Training Aid: Operators are provided with a hard copy of the Telephone Etiquette Handbook.
Telephone operators will apply conflict resolution skills.	Video: Examples of great and poor conflict resolution skills	Assessment: Role-play: The operator will apply conflict resolution skills to resolve a conflict.	Discussion: Operators share good and bad examples of conflict resolution from their own experiences.
Telephone operators will ensure that a customer's issue is resolved appropriately by the end of the call.	Lecture: Customer Service Resolution	Assessment: Role-play: Operators will apply customer service skills to resolve a customer issue.	Discussion: Operators will discuss what it means to resolve a call and the implications if it is not resolved correctly.

Assessment Summary
Two types of assessment will be conducted during the course: formative and summative. Formative assessments are the various activities (e.g. hands-on, role play, discussion sessions). These are not scored. Feedback will be provided to the learners through discussions or Q&A sessions right after the completion of the activities in each lesson. The end-of-course final assessment will be the summative assessment. Trainees will be assessed on the new knowledge and skills they have acquired through the course to manage phone call inquiries. It will be a simulation activity based on a real-life scenario. This assessment measures student learning with a rating scale and criteria.

Quality Evaluation Plan
Formative Team 3 will conduct a stakeholder survey and utilize the Quality Matters rubric to evaluate the training deliverables at the end of the design phase.
Summative An end-of-class survey will be sent to all students to evaluate the overall course. Questions pertaining to the course materials, course objectives, the instructor/facilitator, learning activities, and the learning environment will be included as a part of the survey.
Confirmative One month after the training has been completed, another survey will be sent to all students to determine if the learning from the training has been maintained. Furthermore, data will be collected from the call center to determine the level of progress in customer satisfaction.

Telephone Operator Customer Service Skills: A FACILITATOR'S GUIDE

Purpose of this Facilitator's Guide:

The purpose of this training is to build the Telephone Operator's customer service skills and telephone etiquette at PJ Enterprises. The Instructor-Led Training and Telephone Etiquette Handbook will provide Operators with the hard and soft skills they need to improve the customer experience and job satisfaction. This facilitator's guide will give the facilitator direction on how to instruct the Telephone Operator Customer Service Skills course.

Learning Environment:

The training will take place in the company training classroom, which is big enough to seat and accommodate all learners. The classroom is equipped with a network laptop attached to a multimedia projection system and a whiteboard. PJ Enterprises' Head of IT will serve as the point of contact for any technology-related questions or issues for the duration of the training. For learning or admin-related issues, [Redacted] is the designated point of contact.

Time Requirements

Terminal Objective #1 will take approximately 6 hours with breaks and lunch built-in. This class is blocked off for a full day in case of unplanned occurrences or running over on time.

AM

- Enabling Objective 1
- Enabling Objective 2
- Lunch

PM

- Enabling Objective 3
- Admin-Release

Facilitator Expectations

Prior to Training

The facilitator is expected to be familiar with the content they will be instructing. They will:

- Master the course materials as if they were a learner including passing all assessments.
- Study the Standard Operating Procedures (SOP) of Telephone Operators and all classroom relevant company policies. Management will provide these materials.
- Observe and interact with different Telephone Operators and Customer Service Representatives during at least one shift.
- Review all course materials with [Redacted] to clear up any questions.
- Contact PJ Enterprises' Head of IT for any pre-training technology concerns.
- Complete a minimum of 2 practice runs presenting the course materials.

During Training

- Maintain control and safety in the classroom at all times.

- Follow the directions and timelines provided in this guide.
- Adhere to all company policies.
- Conduct training in a professional and responsible manner.
- Demonstrate confidence and competence while presenting course materials.
- Contact PJ Enterprises' Head of IT as needed for any emergent technology issues.

After Training

- Administer Summative Assessment to each learner.
- If a learner fails the assessment, schedule and facilitate retraining and re-testing as needed.
- Conduct an end-of-course survey (written survey and informal feedback session).
- Present all compiled surveys and test results to management.
- Attend the Post Training Evaluation meeting and provide input to Project Manager and stakeholders.

Project Playbook Objectives:

Terminal Objective #1: Given the Standard Operating Procedures (SOP), telephone operators will be able to demonstrate customer service procedures with 100% SOP compliance.

Enabling Objectives:

- Telephone operators will implement a standard greeting or script as a guide for each phone call.
- Telephone operators will apply account security measures.
- Telephone operators will process call escalations as needed.

Terminal Objective #2: Given a customer service call, telephone operators will correctly solve a customer's issue 4 out of 5 times using appropriate telephone etiquette.

Enabling Objectives:

- Telephone operators will apply proper telephone etiquette techniques, including responsiveness, appropriate tone, and active listening.
- Telephone operators will apply conflict resolution skills.
- Telephone operators will ensure that a customer's issue is resolved appropriately by the end of the call.

Materials

General

- User's manual for telephone system
- 30 Name cards or name stickers (5 extra for visitors or mishaps)
- 30 Pens or pencils

EO1

- Pre-loaded YouTube video of "Bad Customer Service Montage"
- "Standard Greeting: What It Is and How to Use It" Slide Deck
- One copy of printed out slides with notes for the presenter
- 25 copies of Standard Greeting/Operator Script
- Knowledge Check Printouts

EO2

- "Account Security Measures: When and How to Use Them" Slide Deck

- 25 copies of Account Security and Verification Script
- 25 copies of Account Security items Mini Reference List
- Instructor list of Account Security Drill Assessment prompts (8-10 minimum)

EO3
- “Redirect Procedures: When and How to Use Them" Slide Deck
- 25 Copies of PJ Enterprises’ SOP for Telephone Operators (Handout provided by Management Team)
- 3 Copies of Summative Assessment Role-Playing Script and Grading Rubric

INSTRUCTIONAL CONTENT:

Terminal Objective: Given the Standard Operating Procedures (SOP), telephone operators will be able to demonstrate customer service procedures with 100% SOP compliance.	
Enabling Objective: Telephone operators will implement a standard greeting or script as a guide for each phone call.	
Activities and Methods	**Time Estimate**
Introduction:	
1. Welcome and Introductions	
• Welcome learners to the course and introduce yourself.	2 min
• Go over housekeeping information: ○ Review the schedule of the day and the approximate time and duration of the course including breaks, the location of the restrooms, and the smoking area (if applicable). ○ Review expectations of learners: return from breaks on time, ask questions if additional clarification is needed during instruction, participate as needed ○ Ask learners to write their names on a tent card or name tag with a marker	5 min
2. Icebreaker Activity	
• Direct learners to watch “Bad Customer Service Montage” video: https://www.youtube.com/watch?v=bTbHwnxCGaI	2 min
• After learners watch the video, ask what they noticed about the customers’ reactions to the employee providing the customer service. Ask how these interactions might differ if the conversation occurred over the phone.	3 min
• Summarize themes of learners’ responses.	2 min
3. Overview of Objectives	
• Direct learners to the slide deck of EO1: “Standard Greeting: What It Is and How to Use It” and read the objectives listed. Use phrases such as, “By the end of this session you will be able	1 min

to…" and "By the end of the day, you will be able to…" along with the objectives.	
Absorb Activity: Lecture/Instructor Demonstration 1. Use the Standard Greeting/Operator Script to demonstrate the actions and/or words required by a telephone operator when a phone call occurs. 2. Ask what the learners noticed about the demonstration and how the mock phone call was conducted. 3. Hand out the Standard Greeting/Operator Script to learners. Demonstrate a mock phone call again, but this time pause during the phone call and direct the learners to the pertinent parts of the script.	10 min 15 min
Connect Activity: Discussion 1. Ask learners to brainstorm real-world examples of "going off script" and how that impacted the call experience.	10 min
BREAK	**10 min**
Do Activity: Assessment/Knowledge Check 1. Conduct knowledge check. Learners will match customer input with the correct operator response on a ten question matching exercise. Learners must match customer input with correct operator response on 9 out of 10 questions.	25 min
Total time for Objective 1	**1 hr 25 min**
BREAK	**10 min**
Enabling Objective: Telephone operators will apply account security measures.	
Introduction 1. **Review** EO1, clarify any related questions, tie in EO2. 2. **Say**, "Now that we've greeted the customer appropriately, let's look at how to apply account security measures so that the correct information is accessed for the correct customer at all times."	5 min

Absorb Activity: Lecture 1. **Ask** learners to define or list examples of “account information” -- for PJ Enterprises, these include first name/last name, account number, order number, and address. Write these items on the whiteboard. 2. **Direct** learners to the slide deck for EO2, titled: “Account Security Measures: When and How to Use Them” Allow learners to quickly review standard account information items (which should be similar to the previous informal list) on the first slide. 3. **Discuss,** during the next slide, the importance of account information security and verification as it relates to customer trust, business goals and profit, and operator customer service. Highlight the importance of account security measures **throughout the call**, not only at the beginning. 4. **Hand out** the “**Account Security and Verification**” Script to learners. **Ask** for one volunteer operator to role-play the security verification portion of a customer service call with the facilitator.	5 min 5 min 5 min 10 min
Connect Activity: Discussion 1. **Discuss** the repercussions of poor security measures. Encourage operators to share their own experiences. The goal of this discussion is to connect the far-reaching implications of account security to the operators’ daily interactions.	15 min
BREAK	**10 min**
Do Activity: Knowledge Check/Assessment 1. **Conduct** Knowledge Check. As the facilitator, roleplay several initial customer prompts in front of the group, such as “I’d like to refund my order,” and randomly select an operator to respond back with an appropriate account security and verification response. ○ Repeat this drill 8 to 10 times, stopping to clarify any confusion or incorrect answers.	20 min
TOTAL TIME FOR OBJECTIVE 2	**1 hr 25 min**
LUNCH	**1 hr**
Enabling Objective: Telephone operators will process call escalations as needed.	
Introduction and Connect Activity: SOP handout	

1. **Hand out** hard copies of PJ Enterprises' SOP for Telephone Operators. Learners will refer to this throughout the lecture as a training aid and will keep it upon completion of the course. 2. **Review** of EOs 1 and 2, tie in EO 3. 3. **Say** "We've learned how to greet our customers, use our script to improve customer experience, and apply account security measures." (Provide 2 or 3 specific examples from class discussions.) "So far our learning has involved standard operating procedures for calls that go smoothly, let's build on that foundation and learn how and when to escalate calls when they don't."	5 min

Absorb Activity: Lecture/Discussion
1. **Present** the slide deck for EO3 titled "Redirect Procedures: When and How to Use Them" This module includes references to the SOP for each situation presented.
    ○ After each section, pause for questions or experiences shared by learners.
    ○ After every example, refer the class to the SOP so they can get used to using it as the method of making call escalation determinations.
	45 min

BREAK	**10 MIN**

Do Activity: Formative Assessment Q&A
 	
1. **Present** five scenarios involving the need for call escalation (separate slide deck titled "Redirect Procedures: Scenarios").
    ○ Each scenario is a prompt that requires a brief class discussion where students may use their SOPs and reach an answer as a group.
    ○ Each scenario should run between 5-10 minutes
    ○ The scenarios are not graded.
2. Each scenario is presented on its own slide, **advancing** the slide (click, enter key, space bar, or right arrow) will run the animation which shows the best answer to the scenario.
    ○ Once the answer is presented, ask the learners why they think that would be considered the best answer.
    ○ **Advancing** the slide a second time provides justification for that answer.
	50 min

End of Day
1. **Review** the learning objectives and resources available to the operators. This is a very brief review, and should not take more than a minute.
2. **For the Next Day**
    a. **Introduce** Terminal Objective #2 as the topic.
    b. **Summarize** the Schedule
    c. **Release** the class
	10 min

TOTAL TIME FOR OBJECTIVE 3	**2 hrs**
TOTAL TIME FOR TERMINAL OBJECTIVE 1	**6 hrs**
The end-of-course final assessment (after Terminal Objective #2) will be a summative assessment. Learners will be assessed using a scripted simulation based on a real-life scenario. The facilitator will use a scripted scenario to interact with the individual learner in a separate office, with [Redacted] grading the activity with a grading rubric. This will be a go/no-go grading scale with the learner graduating from the class or being re-trained and re-tested at a later date as required.	

Unit Wrap Up Checklist

- Group discussion/Final questions
- Where to find today's handouts on the intranet
- Schedule and expectations for next day (After Terminal Objective 1)
- End of course survey (After Terminal Objective 2)
- Classroom Cleanup

Execution Phase Documents

Change Request

CHANGE REQUEST FORM

Change Description		
Project Name: Project Playbook	**Change Name:** N/A	**Number:** 001
Requested By: [Redacted] (HR)	**Contact:** 555-555-5555 or [Redacted]	**Date:** 12/6/2021
Description of Change: The telephone operator training needs to change from Instructor-Led Training (ILT) to a training incorporating Computer-Based Technology (CBT).		
Reason for Change: The omicron variant has accelerated symptomatic cases and hospitalizations despite COVID-19 vaccinations and boosters. Following the guidance from state and local health departments, the recommendation to move to more remote work, when possible, will best facilitate mitigating the risk of transmission, and ensure the health of PJE employees.		
Priority [Circle One]: 1. High 2. Medium 3. Low		
Impact on Deliverables: The biggest impact will be on the in-person Instructor-Led Training as it will not be in-person, but rather online. The Operator Telephone Etiquette handbook and HR Policies handbook will still be completed.		
Impact of Not Responding to Change (and Reason Why): If the telephone operator training continues in the style of an Instructor-Led Training, the potential exists for the increased transmission of the COVID-19 virus among telephone operators. This could jeopardize the number of telephone operators available to assist customers. If the number of employees unable to work becomes too high, it could result in longer wait times, resulting in unhappy customers.		
Date Needed: ASAP	**Approval of Request:**	**Date:**

Change Impact
Tasks/Scope Affected: The design, development, implementation, and evaluation phases will require a storyboard to be created for the CBT. Like the facilitator guide, the storyboard will need to go through a draft and review cycle, and then later needs to be developed, implemented, and evaluated with the software programs.
Cost Evaluation: Approximately 4100 USD additional
Risk Evaluation: Low impact - There is little-to-no risk to converting the training.
Quality Evaluation: N/A
Additional Resources: Zoom, **Authoring Tool (Articulate 360)**, LMS **(Moodle Cloud)**
Duration: 6 weeks
Additional Effort: The Head of IT at PJ Enterprises will need to be informed of these changes, as he or she may be responsible for managing the LMS and additional programs required to provide the training experience.
Impact on Deadline: The date of the ILT was scheduled for 01/17/2022.
Alternative and Recommendations: There is the possibility for synchronous learning and asynchronous learning with the various resources to provide for a successful learning

experience for the telephone operators. Perhaps the training could be hybrid, with parts of it completed in person and parts of it completed online.

Sign Offs	
[Circle One]: 1. Accepted **2. Deferred 3. Rejected 4. More Info Requested**	
Comments:	
Project Manager Signature:	**Date:**
Decision Maker Signature:	**Date:**

Meeting Agenda and Minutes

Information

Project Name: Project Playbook	**Meeting Date:** December 13, 2021
Facilitator: Project Team 3	**Meeting Time:** 1:00 ET – 2:30 ET

Attendees

Name:	Department:	Email:	Phone Number:
[Redacted]	Project Sponsor		555-555-1234
[Redacted]	Project Manager		555-555-5678
[Redacted]	Instructional Design Team		555-555-5678
[Redacted]	Catalog Dept		555-555-9101
[Redacted]	Merchandise Dept		555-555-1110
[Redacted]	HR		555-555-5555
[Redacted]	IT		555-555-9876
[Redacted]	Finance		555-555-5432

Meeting Objectives

Address Change Request to make instructor-led training virtual.
Decide steps and resources needed to make the change to virtual.

Meeting Agenda

Item:	Time:
Scope Change	1:00 -1:09 pm
Technology Procurement	1:10 - 1:16 pm
Personnel	1:17 - 1:25 pm
Budget	1:26 - 1:35 pm
Schedule	1:35 - 1:50 pm
Tasks	1:50 - 2:20 pm
Wrap Up	2:21 - 2:28 pm
Adjourn	2:28 pm

Action Item Review

Item:	Status:	Assigned To:
Project Charter	Pending Revision	Project Manager
Schedule	Pending Revision	Project Manager
Needs Analysis	Complete	Instructional Design Team
Design Document	Pending Revision	Instructional Design Team
Design ILT	Paused with intent to cancel	Instructional Design Team

Design Telephone Etiquette Handbook	Reviewing First Draft	Instructional Design Team
Design HR Policies Handbook	Incorporating First Draft Revisions	Instructional Design Team

Schedule Review

- **Completed Items**

Item:	Completed Date:	Assigned To:
Needs Analysis	11/29/21	Instructional Design Team
Other completed items moved back to revision		

- **To Be Completed By Next Meeting**

Item:	Target Completion Date:	Assigned To:
Scope Change Request Sign Off	12/15/2021	Project Manager
Procure Storyline, Moodle LMS	12/20/2021	IT and Finance
Revise Design Document	12/20/2021	Instructional Design Team
Create Storyboard	12/20/2021	Instructional Design Team
Rework Schedule	12/15/2021	Project Manager
Hire Virtual Facilitator	12/20/2021	HR

New Action Items

Action Item:	Assigned To:
Scope Change Request Sign Off	Project Manager
Procure Storyline, Moodle LMS	Instructional Design Team
Revise Design Document	Instructional Design Team
Create Storyboard/Sign Off	Instructional Design Team
Setup LMS	IT Department
Hire Facilitator	HR
Rework Schedule	Project Manager
Create CBT	Instructional Design Team
Modify Facilitator Guide	Instructional Design Team

NEXT MEETING: DECEMBER 20, 2021, 1 - 2:30 ET

____________________ 12/13/2021

PROJECT MANAGER SIGNATURE DATE

NOTES

- COVID variant prompted PJ Enterprises to change the training method due to pending lockdown. Mary Swanson from HR submitted a change ticket to change the training to virtual.
- The stakeholders expressed concern that computer-based training would limit the experience gained from in-class interaction.
  - We agreed to keep the training synchronous when possible with the training completed by the individuals at home, but activities would take place over Zoom video conferencing. PJ chose Zoom because they already have licenses from the last lockdown.
- The instructional design team suggested using the Articulate 360 suite for a more interactive and engaging CBT than what was previously created in PowerPoint.
  - They also stated that since the project change was happening so early in the development of the PowerPoint training module, they estimated that they would only be behind in the development phase by about 10 days.
  - They will need to revise some design and scope documents and create a storyboard for the new CBT.
  - There was some concern expressed about the move to CBT drastically changing the course length. The ID team said they had left 2 extra hours in the training day for unforeseen circumstances and will revisit this in the design document to be certain.
- The ID team will need to have Articulate 360 and an affordable Learning Management System (Moodle cloud). Using both together will allow us to virtually assign, track, and manage learning specifically for each user.
  - Articulate 360 is $1299 per person for the company plan.
  - Moodle Cloud mini tier (100 people) is $200 per year.
  - Finance and IT will work together to procure the technology.
- IT will have to procure, install and manage the new technology. They will assign a person to be an LMS administrator.
- The job description for the job board advertisements needs to be changed to add the required skill of virtual facilitation.
  - A minimum of 1-year virtual facilitation experience is required.
  - We can't support an entry-level applicant when there are no other facilitators to mentor them.
- Budget will be adjusted to reflect changes in man-hours and technology procurement. Project sponsor and finance are on board with this.
- The project manager will rework the schedule to reflect revisions of various design documents and the creation of the CBT.
- Because this change came so early in the development phase and there was enough time before the class was scheduled to take place that the project as a whole would remain on schedule pending any additional setbacks.

ONLINE PURCHASE ORDER #01200

Company:	PJ Enterprises	Purchased From:	Moodle Pty Ltd
Address:	1234 Acme Lane Boston, Massachusetts 12101	Address:	PO Box 303, West Perth WA 6872 Australia
Phone:	1-800-PJ-GIFTS	Phone:	1-800-MOODLE-1
Email:	sales@pjenterprises.com	Email:	sales@moodle.com

BILLING

Company:	PJ Enterprises
Address:	1234 Acme Lane Boston, Massachusetts 12101
Phone:	1-800-PJ-GIFTS
Email:	sales@pjenterprises.com

DELIVERY

Delivery Method:	ONLINE
Delivery Date:	Upon receipt of payment

SERVICE TOTAL

#	ITEM	AMOUNT	SUBTOTAL	TOTAL
1	MOODLECLOUD – MINI TIER PLAN (100 USERS)	1 YEAR SUB – AUTO RENEW	200.00 USD	200.00 USD
2				
3				

__________________________ ____/____/____

SIGNATURE DATE

ONLINE PURCHASE ORDER #01210

Company:	PJ Enterprises	Purchased From:	Articulate Global LLC
Address:	1234 Acme Lane Boston, Massachusetts 12101	Address:	244 5th Avenue, Suite 2960 New York, NY 10001
Phone:	1-800-PJ-GIFTS	Phone:	1-800-861-4880
Email:	sales@pjenterprises.com	Email:	sales@articulate.com

BILLING

Company:	PJ Enterprises
Address:	1234 Acme Lane Boston, Massachusetts 12101
Phone:	1-800-PJ-GIFTS
Email:	sales@pjenterprises.com

DELIVERY

Delivery Method:	ONLINE
Delivery Date:	Upon receipt of payment

SERVICE TOTAL

#	ITEM	AMOUNT	SUBTOTAL	TOTAL
1	ARTICULATE 360 TEAM - 1 YEAR PLAN	3 USERS @ 1299 USD EACH	3897.00 USD	3897.00 USD
2				
3				

______________________ ____/____/____

SIGNATURE DATE

Scope Change and Verification Form

Project Playbook Scope Change Log			
Date	Change Version	Description of Change	Approving Official
12/06/21	1.1	The telephone operator training needs to change from Instructor-Led Training (ILT) to a training incorporating Computer-Based Training (CBT) which will have virtually facilitated activities.	[Redacted], Project Sponsor/Owner

Project Playbook Scope Verification Form			
Deliverable	**Name of Deliverable Verifier**	**Is the deliverable satisfactory? (Y/N)**	**Completion Date**
CBT module	[Redacted], Project Sponsor/Owner	Y	1/13/22
Verifications Results and Comments:	The change from ILT to CBT happened early enough in the process that it only put the training module completion 10 days behind schedule, while the project completion itself remains on schedule. All learning objectives and content remain unchanged with the exception of additional interactivity for activities enabled by new learning software. A trial run with an operator shows that the learning objectives are answered and the training is thorough and sound.		
Deliverable	**Name of Deliverable Verifier**	**Is the deliverable satisfactory? (Y/N)**	**Completion Date**
Operator Telephone Etiquette handbook	Customer Service Subject Matter Expert (SME)	Y	12/17/21
Verifications Results and Comments:	The handbook contains all required procedures and conversations. It is easy to navigate and understand while capturing points succinctly. There is no incorrect or extraneous information.		
Deliverable	**Name of Deliverable Verifier**	**Is the deliverable satisfactory? (Y/N)**	**Completion Date**
HR Policies handbook	HR Manager	Y	12/22/21
Verifications Results and Comments:	Every required policy is covered in this new handbook. All information is		

	accurate and easy to read. Sections are marked clearly and everything is easy to find.

Stakeholder	Signature	Date
[Redacted], Project Sponsor/Owner	X	1/13/22
[Redacted], Catalog Director	X	1/13/22
[Redacted], Merchandising Manager	X	1/13/22
HR Manager	X	1/13/22
Customer Service Subject Matter Expert	X	1/13/22
[Redacted], Project Manager	X	1/13/22
[Redacted], Project Team Member	X	1/13/22
[Redacted], Project Team Member	X	1/13/22