

ACME Company

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Project Alpha: Call Tracking System Upgrade

Project Charter

V2.0

July 8, 2013

TABLE OF CONTENTS

- 1 INTRODUCTION/HISTORY 3**
- 1.1 About this Document – What is a “Charter”? 3
- 1.2 Revision History 3
- 1.3 Project Background and Purpose 3
- 2 PROJECT OBJECTIVE STATEMENT 3**
- 3 PROJECT PRIORITIES 3**
- 4 SUCCESS CRITERIA 3**
- 5 ASSUMPTIONS 4**
- 6 SCOPE 4**
- 6.1 Project Scope..... 4
- 6.2 Out-of-Scope..... 4
- 7 SCHEDULE TARGETS..... 5**
- 8 BUDGET/RESOURCES TARGETS..... 5**
- 9 STAKEHOLDERS 5**
- 10 DELIVERABLES/OUTPUTS 5**
- 11 APPROVAL 6**

1 INTRODUCTION/HISTORY

1.1 About this Document – What is a “Charter”?

The Charter is the foundation definition document for a project. It describes the high-level business case and project goals and outlines the project schedule, scope and resource boundaries/targets. It is a living document that represents the current understanding of the project the sponsoring organization has agreed upon. Once created and approved by the project sponsor(s), the charter is maintained as a version controlled document modified only with sponsor approval.

1.2 Revision History

Version #	Version Date	Version Description/Notes
1.0	July 1, 2013	Capture early discussions between project manager and sponsor
2.0	July 7, 2013	Refine charter with team and stakeholder input

1.3 Project Background and Purpose

Customer Services Department has been using the Bravo call tracking system for nine years to allocated and capture statistics on incoming customer service calls. In that time, call volume has grown five-fold and we have experienced both capacity and reliability problems with the Bravo system. Its manufacturer no longer supports the Bravo system. A decision was made to replace the Bravo system with the Alpha call tracking system. Alpha has been procured and must be installed, configured, tested, and implemented into production.

This project will design/configure and implement the new Alpha call tracking system in time for the expected annual spike of customer support calls in December.

2 PROJECT OBJECTIVE STATEMENT

Design and Implement a new call tracking system on October 15, 2013 for \$200K

3 PROJECT PRIORITIES

Flexibility	Least	Somewhat	Most
Resources			X
Schedule	X		
Scope		X	

4 SUCCESS CRITERIA

1. All calls to customer service after the implementation date are routed and tracked using the new system.

Project Alpha: Charter

2. All customer service personnel demonstrate capability to use the new system
3. Operations accepts responsibility for ongoing maintenance and support of system after implementation

5 ASSUMPTIONS

1. Important that the new system is operational by 12/1 to support holiday calls
2. (Deleted) – Moved to “Out of Scope”
3. Procurement of the server to support data retention and reporting is part of the project
4. User training for 25 customer support reps/managers @ 2 hrs each
5. Operations training for 2 operations people @ 8 hrs each
6. Training time (person hours) for Customer Services and Operations Personnel are not part of project budget

6 SCOPE

6.1 Project Scope

- Implement the new call tracking system in production
- Procure server hardware to support the system
- Provide appropriate training and documentation to users in customer service
- Provide appropriate training and documentation to operations group
- Perform turnover to operations
- Work with customer services to collect and document requirements in the form of User Stories
- Design the new system and describe it in the form of work flow diagrams
- Convert historical data from Bravo system into Alpha
- Train users in system usage
- Train customer services managers in metrics and reporting
- Train operations in system operation and trouble shooting
- Serve as primary system support group for the first seven days of operation during turnover to Operations group

6.2 Out-of-Scope

- Project does not include disposal of old equipment
- Operations (not project staff) will configure new server
- Project does not include procurement of Alpha system or maintenance contracts

Project Alpha: Charter

7 SCHEDULE TARGETS

- Start Project: August 1
- Implement Alpha System in Production: October 15
- Complete Project: October 22

8 BUDGET/RESOURCES TARGETS

Equipment & Other costs	\$104,000
Personnel (12 person months at \$8K per mo)	\$ 96,000
Total Budget	\$200,000

9 STAKEHOLDERS

Sponsor: Mary W

Customer Services Manager: Martin S – Primary Representative from Customer Services

Operations Manager: Juan Z – Primary representative from Operations

Customers – Seek support from Customer Services

Customer Services Staff – Answer calls & help customers

Customer Services Managers – Monitor workload & performance statistics

10 DELIVERABLES/OUTPUTS

Project will create the following deliverables:

1. User Training Materials – Powerpoint slides and handouts to support two hours of user training (Electronic form in project library + 35 paper copies for training participants)
2. User Documentation – A user reference card that explains how to do the ten most common things with the system (electronic form in project library + 35 laminated paper copies)
3. Operations Documentation – Documentation for Operations that explains configuration, backup and restore (electronic in project library + 2 paper copies for operations)
4. Complete hardware and software inventory of all components being transferred to operations (electronic copy in project library + 2 paper copies for operations)
5. Final project status report explaining costs, final schedule, and lessons learned (electronic copy in project library)
6. List of all known issues at turnover (electronic copy in project library)

11 APPROVAL

Name (print)	Role and Organization	Signature	Date
Mary W	Sponsor, Mgr of Telecomm		
Martin S	Customer Support Mgr		
Juan Z	Operations Mgr		