**Deliverable 1: Project Charter — Digital Customer Service Portal**

**1. Project Title**

**Digital Customer Service Portal for Safaricom FinTech**

**2. Project Purpose**

To develop and implement a scalable, multi-channel digital customer service portal that enables customers to access self-service options, live chat support, ticket management, and feedback submission, enhancing overall customer experience and operational efficiency.

**3. Project Objectives**

* Increase customer satisfaction score by 30% within the first year of deployment.
* Reduce call center call volume by 25% by providing effective self-service and chatbot options.
* Achieve 99.9% system uptime and responsiveness within 2 seconds page load time.
* Enable 24/7 support availability across web and mobile platforms.

**4. Project Scope**

* Design and development of a web-based portal and mobile app interface.
* Integration with existing CRM systems (e.g., Salesforce).
* Implementation of AI chatbot for initial customer interaction.
* Ticketing system for issue tracking and escalation.
* User roles and access permissions management (customers, agents, managers, admins).
* Real-time analytics dashboard for customer service management.
* Compliance with accessibility standards (WCAG 2.1) and data privacy regulations.

**5. Key Stakeholders**

| **Role** | **Name / Department** | **Responsibility** |
| --- | --- | --- |
| Project Sponsor | CIO, Safaricom | Provide overall project sponsorship and strategic direction. |
| Project Manager | IT PM | Manage project execution and deliverables. |
| Customer Service Lead | Customer Support Dept. | Define requirements, ensure adoption, user feedback. |
| Development Team Lead | IT Dept. | Lead software development and integrations. |
| Security Officer | IT Security | Ensure compliance with security policies. |
| Vendor Representatives | External Vendors | Provide chatbot, cloud, and CRM integration support. |

**6. Milestones and Timeline**

| **Milestone** | **Estimated Completion** |
| --- | --- |
| Project Kickoff | Week 1 |
| Requirements Gathering and Finalization | Week 3 |
| Design and Architecture Approval | Week 6 |
| Development Phase 1 (Core Features) | Week 12 |
| Development Phase 2 (Integrations and AI Chatbot) | Week 16 |
| User Acceptance Testing | Week 18 |
| Pilot Launch | Week 20 |
| Full Rollout | Week 24 |

**7. Budget Overview**

Estimated budget: KES 35 million covering development, licensing, infrastructure, training, and contingency.

**8. Assumptions**

* Existing CRM systems provide necessary APIs for integration.
* Key stakeholders will provide timely input and approvals.
* Necessary infrastructure resources (cloud, servers) are available.

**9. Constraints**

* Regulatory compliance requirements may evolve.
* Dependency on third-party vendor performance.
* Limited window for pilot due to business seasonality.

**10. Risks**

* Integration failures with CRM or payment systems.
* Delays due to data privacy compliance audits.
* User adoption slower than anticipated.

**11. Approval**

| **Name** | **Title** | **Signature** | **Date** |
| --- | --- | --- | --- |
| [Sponsor] | CIO |  |  |
| [PM] | Project Manager |  |  |

Would you like me to generate this as a Word document file next? Or should I proceed with Deliverable 2: Business Case?