

Contact Centre Case Study – Communication Plan

The American Dream-

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Contents

Contact Centre Case Study – Communication Plan	1
Communication Plan Overview	3
Project Background.....	3
Communication Plan Purpose / Scope	4
Communication Plan Execution	6
Communication Matrix	10
Meeting & Presentation Guidelines.....	10
Report Formats / Templates.....	13
Glossary	17
Appendix	18
References	19

Communication Plan Overview

This communication plan comprises two components: the communication plan document (Item 1) and the attached communication matrix (Item 2). Please refer to each accordingly. All information and content in this document pertain to Item 1.

Project Background

With a staggering annual volume of approximately 186,000 customer support calls across 2134 store locations, the organization has recognized the need for a transformational initiative. These calls, comprising of general inquiries, technical assistance, vendor dispatch requests, and misdirected calls, place significant demands on the Store Repair Support, Fleet Support, and Store Operations Support departments (Bolick & Northeastern University, 2019, p.3). The department specific hotlines offer different levels of phone support: general, technical, vendor dispatch and misdirected calls. (Bolick & Northeastern University, 2019, p.3).

Business Case

The challenge at hand is optimizing the existing support processes, as they are considered inefficient and time-consuming for store personnel. Store managers currently struggle with three separate contact numbers, leading to frequent errors in directing calls to the appropriate department. This often results in unnecessary call transfers and customer dissatisfaction.

The primary goal of the Contact Centre project is to provide a centralized contact support system for stores. This system aims to consolidate first level support calls into one point of contact, streamlining operations. Additionally, it will ensure that second level technical support and work order dispatch for contracted vendors are efficiently handled by the relevant department.

Communication Plan Purpose / Scope

The purpose of this communication plan is to establish a structured framework for effective and efficient communication among all project stakeholders involved in the Contact Center Project.

This plan aims to facilitate the exchange of project-related information, updates, and feedback to ensure a shared & unified understanding of project goals, milestones, and responsibilities. By

implementing this plan, the project team seek to:

Promote Stakeholder Engagement	Engage all stakeholders, including internal and external parties, to foster collaboration, alignment, and commitment to the project's objectives.
Ensure Clarity of Communication	Define clear and consistent methods, channels, and frequency of communication to minimize misunderstandings and keep stakeholders informed.
Manage Expectations	Set realistic expectations regarding project timelines, deliverables, and potential impacts, and continuously manage and address stakeholder expectations.
Mitigate Risks and Issues	Establish channels for identifying and addressing project risks, concerns, and issues promptly, minimizing their potential impact on project success.
Facilitate Decision-Making	Enable timely decision-making by providing stakeholders with the necessary information, data, and context to make informed choices that support project goals.
Support Change Management	Recognize the need for change management efforts, particularly for stakeholders facing significant process or workflow changes, and provide the necessary support and communication.
Document and Archive Communications	Maintain a record of all project-related communications, decisions, and agreements for future reference, audits, and compliance.
Adjust and Adapt	Continuously assess and adapt the communication plan as the project progresses, considering stakeholder feedback, emerging issues, and changing project requirements.

While the communication plan is comprehensive, it does have some constraints:

- Resource and Time Constraints: Limited availability of project team members and key stakeholders may hinder timely updates and utilization of the matrix.
- Tool Adoption: Resistance to adopting the communication matrix as a new project management tool may slow down its integration into the project implementation.
- Complex Stakeholder Network: Managing communications for a diverse set of internal and external stakeholders, each with unique communication needs and preferences, can be a constraint.

Communication Plan Execution

In addition to the communication matrix, this section delves into how the communication plan will be executed by the project team, emphasizing responsibility and coordination. Effective execution of the communication plan is essential for project success.

Responsibilities and Execution (Bolick & Northeastern University, 2019)

Responsibility	Stakeholders Responsible	Communication Channels
Approving Messages	Project Sponsors: VP Contact Center (Paulette Larson), VP Store Operations (Rickey Spencer), VP Store Repair Support (Francis Scott), VP Fleet Support (Max Fox)	Approve project plans, charters, change requests, conflict resolution, risk/issue resolution.
Sending Messages	Project Management Team: Co-Project Managers (Team American Dream), Co-Project Manager-Facility Operations Process Manager (Billy Caldwell)	Send project progress, challenges, milestones, using meetings, emails, project management software.
Receiving and Coordinating Messages	Contact Centre stakeholders: Ops Director (Wayne Sherman), Technical Writing Manager (Kenny Medina), Staffing Manager (Ben Chapman), In-Bound Director (Angela Stevens), Sales Director (Matthew Huff)	Receive and coordinate messages in their respective areas.
	Technical Writing Team (Tech Writers)	Actively participate in script development and guideline maintenance.
	Staffing Team: Staffing Manager (Ben Chapman), Staffing Analysts, Staffing Coordinators	Coordinate staffing needs and changes.
	Call Centre Staff: Supervisors and Call Agents	Receive regular updates and provide feedback.
	Sales Team: Sales Coordinators and Sales Agents	Collaborate on strategies and sales-related information.

Execution Strategy

The execution strategy for the Contact Centre Case Study communication plan is designed to foster effective communication, engagement, and responsiveness among project stakeholders.

Elaboration of the key elements:

- 1. Regular and Transparent Communication:** Transparency is at the core of the execution strategy. It entails regular updates on project progress, challenges, and milestones. These updates will be shared not only with the project team but also with key sponsors and stakeholders. Transparency builds trust and ensures that everyone is well-informed about project developments.
- 2. Alignment with Strategic Objectives:** Emphasis on how the project aligns with the organization's strategic objectives and business benefits. This alignment ensures that all stakeholders, especially sponsors like VP Contact Center (Paulette Larson) and VP Store Operations (Rickey Spencer), understand how the project contributes to the broader goals of the company. By doing this, the sponsors would show more support and engage actively with the project.
- 3. Actively Engaging Stakeholders:** Active engagement means involving stakeholders in decision-making processes, seeking their input, and collaborating on solutions. For instance, Project Sponsors will be actively engaged in defining project requirements, resolving conflicts, and brainstorming solutions to risks and issues. This collaborative approach ensures that stakeholder perspectives are considered. (Project Management Institute, 2021, p. 31-33).

- 4. Timely and Clear Communication:** Timely communication is crucial to prevent delays and ensure that the project stays on track. The project management team, led by Co-Project Managers (Team American Dream), will communicate project updates, challenges, and progress clearly and promptly. This includes making timely decisions to address any issues that may arise.
- 5. Proactive Risk Management:** Proactive risk management involves identifying and addressing project risks before they escalate. The project management team will work closely with stakeholders to identify potential risks and develop mitigation plans. This proactive approach minimizes disruptions and keeps the project on course. As per PMBOK's guidance on issue and risk management, a robust issue and risk communication plan will be established. This plan will detail how issues and risks will be communicated, who will be responsible for their resolution, and the escalation process. (Project Management Institute, 2021, p. 54).
- 6. Collaboration on Issue Resolution:** Collaboration is key when it comes to resolving issues. By involving stakeholders in issue resolution, the project team taps into their expertise and insights. This collaborative approach ensures that issues are addressed promptly and with the best possible solutions.
- 7. Maintaining High Project Quality:** Quality assurance is an ongoing process throughout the project lifecycle. The project management team will prioritize and oversee project quality, ensuring that deliverables meet or exceed expectations. This commitment to quality reflects positively on stakeholder satisfaction.

- 8. Change Management:** The project management team will work closely with stakeholders to manage changes and ensure that stakeholders can adapt to new project-related processes or requirements smoothly. This includes training call agents with new scripts, making all stakeholders aware of the new centralized solution and how it may directly or indirectly affect their operations.
- 9. Providing Ongoing Project Updates:** Continuous communication is vital for stakeholder satisfaction. By providing regular project updates, stakeholders remain informed about progress and any changes that may affect them. Celebrating achievements and milestones also boosts morale and keeps stakeholders engaged.

The communication execution plan undertakes a holistic approach to stakeholder communication, ensuring that each stakeholder's expectations and needs are addressed while aligning the project with the organization's overarching goals. This tailored approach adds value to the Contact Centre Project by promoting effective collaboration and informed decision-making.

Communication Matrix

*Note: Please refer to **Item 2**, attached separately to this Communication Plan.*

Meeting Guidelines

Clear Meeting Objectives:	Start each meeting by clearly defining its objectives, ensuring that they align with the project's goals and outcomes. This ensures that every communication serves a purpose.
Structured Agenda:	Maintain consistency in meeting agendas, covering essential topics such as project updates, risks, issues, action items, and stakeholder concerns. This structured approach helps streamline meetings.
Effective Time Management:	Implement time management techniques like timeboxing to ensure meetings stay on schedule. Efficiently managing time is essential for resource optimization.
Documentation Standards:	Adhere to established documentation standards for meeting minutes and action items to maintain consistency and clarity. Proper documentation is crucial for effective communication.
Engage Stakeholders:	Actively involve key stakeholders in meetings, encouraging their participation and addressing their concerns. Engaging stakeholders fosters collaboration and buy-in.

Additionally, it is also important to adhere to the following guidelines -

Meeting Etiquette

- Meetings will commence punctually at the designated time, with attendees expected to arrive promptly.
- Attendees will introduce themselves briefly, especially if new members or guests are present.

Agenda and Document Distribution

- Meeting agendas will be circulated in advance to facilitate preparation.
- Relevant materials, documents, or presentations will be disseminated ahead of time to ensure adequate review.

- Participants are encouraged to review the agenda and documents before the meeting.

Preparation and Personality Styles

- Recognize and accommodate diverse personality styles within the team to ensure balanced participation.
- Promote inclusivity by valuing all viewpoints and avoiding polarized discussions.

Meeting Minutes and Action Items

- Meeting minutes and action items will be documented during the meeting and shared within 24 hours of meeting completion.
- Action items will be explicitly assigned to responsible team members along with deadlines.
- Progress on previous actionable will be addressed at the beginning of each meeting.

Virtual Meeting Guidelines

- For virtual meetings, attendees should log in a few minutes early to resolve technical issues.
- Participants are encouraged to use their real names and maintain a professional profile picture or avatar for identification.
- Background noise should be minimized by muting microphones when not speaking.
- Multitasking during the meeting is discouraged to ensure active participation.

Presentation Guidelines

Structure and Content

- Emphasize the project's alignment with organizational objectives and strategic goals.
- Include a section in presentations dedicated to highlighting project risks and issue.
- Showcase quality metrics and key performance indicators (KPIs) relevant to the project.
- Presentations for management or external stakeholders will adhere to a clear and concise structure, encompassing an introduction, key points, supporting details, and a conclusion.
- Visual aids such as charts and graphs will be employed to illustrate key data and points.
- Alignment of content with the project's objectives and addressing stakeholder concerns is essential.

Clarity and Simplicity

- Presentations will prioritize clarity and simplicity, avoiding complex jargon or technical language that may hinder comprehension.
- A consistent and professional font style and size will be employed for readability.

Engagement and Interaction

- Audience engagement will be actively promoted, with opportunities for questions and discussions during and after the presentation.
- Incorporate feedback mechanisms within presentations to gather input and foster stakeholder engagement.

Report Formats / Templates

Report Group	Report Type	Purpose	Contents & Components
Project Management	Project Charter	Outlining project objectives, scope, stakeholders, and timeline.	<ul style="list-style-type: none"> Project objectives and scope Key stakeholders Project timeline and milestones
	Project Plan	Detailing tasks, timelines, resources, and dependencies.	<ul style="list-style-type: none"> Project tasks and activities Task timelines and dependencies Resource allocation Risk assessment and mitigation
	Risk Management Plan	Identifying potential risks and mitigation strategies.	<ul style="list-style-type: none"> Risk identification Risk assessment Mitigation strategies Risk monitoring and control
	Change Management Plan	Describing change identification, assessment, and implementation.	<ul style="list-style-type: none"> Change identification process Change assessment criteria Change implementation plan Change control procedures
	Resource Management Plan	Outlining resource management including staffing and technology.	<ul style="list-style-type: none"> Staffing requirements and roles Technology and resource allocation Resource management procedures
Communication	Communication Plan	Defining communication goals, stakeholders, channels, and frequencies.	<ul style="list-style-type: none"> Communication objectives Stakeholder identification Communication channels Frequency and timing
	Stakeholder Register	Identifying all stakeholders, roles, and contact details.	<ul style="list-style-type: none"> Stakeholder names and roles Contact information Stakeholder interests and influence levels
	RACI Matrix	Defining roles and responsibilities for project tasks.	<ul style="list-style-type: none"> Task or activity list Responsible, Accountable, Consulted, and Informed roles assigned

	Meeting Agendas and Minutes	Recording status meetings with stakeholders.	<ul style="list-style-type: none"> • Meeting agenda topics • Meeting date, time, and location • Meeting minutes and action items
	Status Reports	Summarizing project progress, issues, and upcoming milestones.	<ul style="list-style-type: none"> • Project status summary • Milestones achieved • Issues and challenges. • Upcoming milestones
	Change Requests	Documenting proposed changes and their impact.	<ul style="list-style-type: none"> • Change request details • Impact analysis • Approval process and outcomes
Templates	Message and Content Creation Template	Structuring consistent and targeted messages.	<ul style="list-style-type: none"> • Message content structure • Target audience • Key messaging points
	Escalation Procedure Template	Defining clear steps for issue resolution.	<ul style="list-style-type: none"> • Escalation process flowchart • Escalation contacts and roles • Escalation criteria
	Feedback and Improvement Action Plan Template	Addressing stakeholder feedback and improvement actions.	<ul style="list-style-type: none"> • Feedback collection mechanisms • Action plan for improvement • Responsible parties and timelines
	Communication Schedule Template	Planning and tracking all communication activities.	<ul style="list-style-type: none"> • Communication calendar • Scheduled communications • Responsible parties
	Meeting Effectiveness Evaluation Template	Assessing the success of stakeholder meetings.	<ul style="list-style-type: none"> • Meeting evaluation criteria • Feedback and improvement recommendations
	Change Communication Plan Template	Detailing communication strategies for significant changes.	<ul style="list-style-type: none"> • Change communication objectives & methods. • Target audience for change messages
Reports	Stakeholder Engagement Report	Summarizing stakeholder satisfaction and feedback.	<ul style="list-style-type: none"> • Stakeholder survey results • Feedback analysis • Engagement level assessment
	Communication Effectiveness Dashboard	Visualizing key communication metrics.	<ul style="list-style-type: none"> • Key communication metrics (e.g., open rates, response rates)

			<ul style="list-style-type: none"> • Data visualization and trends
	Change Impact Analysis Report	Analyzing the potential impact of changes on stakeholders.	<ul style="list-style-type: none"> • Description of changes • Stakeholder impact assessment • Mitigation strategies
	Organizational Charts	Showing the project's reporting structure and roles.	<ul style="list-style-type: none"> • Project reporting hierarchy • Roles and responsibilities within the project
Other Documents	Feedback Mechanism	Creating a system for stakeholders to provide feedback.	<ul style="list-style-type: none"> • Feedback collection methods • Feedback processing procedures
	Project Closure Report	Summarizing project outcomes and lessons learned.	<ul style="list-style-type: none"> • Project outcomes and deliverables • Lessons learned and recommendations

Examples

I. Project Charter Template	
Section	Content
Project Title	Enter Project Title
Project Objective	Provide a clear and concise project objective
Project Scope	Define the boundaries and limitations of the project
Key Stakeholders	List key stakeholders and their roles
Project Timeline	Specify project start and end dates
Project Budget	Detail the allocated budget for the project
Risk Assessment	Identify potential risks and mitigation strategies
Project Team	List project team members and their roles
Approvals	Space for signatures of project sponsors and stakeholders

II. Stakeholder Engagement Report Template	
Section	Content
Stakeholder Survey Results	Summarize the results of stakeholder surveys, including satisfaction levels and feedback
Feedback Analysis	Analyze feedback received from stakeholders
Engagement Level Assessment	Assess the level of engagement of different stakeholder groups
Recommendations	Provide recommendations for improving stakeholder engagement
Action Plan for Improvement	Detail the action plan to address feedback and implement improvements
Responsible Parties and Timelines	Assign responsibilities and timelines for each improvement action

III. Project Status Report	
Section	Content
Project Name/ID	Enter the name or ID of the project
Reporting Period	Specify the reporting period (e.g., week, month, quarter)
Project Status Summary	Provide a summary of the project's status
Accomplishments	List key accomplishments and milestones achieved
Challenges and Issues	Identify any challenges, issues, or roadblocks encountered
Upcoming Milestones	Outline the next set of milestones and their expected completion
Resource Allocation	Detail resource allocation and utilization
Risk Assessment	Update on project risks and mitigation efforts
Next Steps and Action Items	List action items and next steps for the project

IV. Minutes of the Meeting	
Section	Content
Meeting Date/Time	Enter the date and time of the meeting
Meeting Location	Specify the location or platform used for the meeting
Meeting Facilitator	Name of the meeting facilitator
Attendees	List the names of meeting attendees
Agenda Topics	Provide a list of agenda topics discussed during the meeting
Meeting Notes	Record detailed notes on discussions, decisions, and actions
Action Items	Document action items, responsible parties, and deadlines
Progress on Prior Items	Update on action items from previous meetings
Next Meeting Date/Time	Specify the date and time of the next meeting

Glossary

Definition of each of the columns in the communication matrix.

Item	Definition
Stakeholder Teams	The different teams/departments within the Contact Center organization
Stakeholder Identification	Numbers used to distinguish and classify stakeholders in each department on formal documents
Stakeholder	Role titles and names
Agenda	List of items that stakeholders will discuss, strategize and set goals for during meetings.
Communication Owner	Person that directly oversee, control and facilitate communication activity
Expectations	List of deliverables expected from stakeholders
Message	Key points and action items that stakeholders will discuss on a regular basis
Medium	Types of systems, channels and documents that stakeholders use
Frequency	Periodical description of action items and responsibilities needs to be recorded and reported
Communication Style	Description of the mannerism and how information is communicated
Barriers	List of barriers and challenges stakeholders may face
Strategy	List of strategies to avoid conflict and overcome barriers in communication between stakeholder
Escalation Contact	Person in charge in case of issues needs more attention from more proficient personnel
Change Management Needs	List of systematic strategy and approach when implementing transitions/changes
Feedback Mechanisms	Systems or channels that stakeholders use to receive and give feedback
Notes	Addition information that needs to take into consideration

Appendix

The project team is equipped with essential resources and guidance in this tailored appendix.

1. Stakeholder Communication Matrix Template: The team will find a customized template that simplifies stakeholder communication. This tool meticulously records stakeholder expectations, anticipates potential barriers, and outlines mitigation strategies. It proves essential in ensuring that the team communicates effectively and precisely with all project stakeholders.

2. Meeting Guidelines: The team benefits from specific meeting guidelines clearly outlined for seamless collaboration. These guidelines encompass crucial aspects such as meeting etiquette, proactive agenda distribution, and the team's commitment to accommodating diverse personality styles. They are geared towards making project meetings productive and respectful.

3. Presentation Guidelines: The presentation guidelines are designed to empower the team in crafting impactful project presentations. They emphasize the importance of aligning the project with organizational objectives, maintaining clarity and simplicity in communication, actively engaging the audience, and fostering interaction.

4. Report Formats / Templates: The project team can utilize customized report templates tailored to meet project management and communication requirements. These templates include essential documents such as the Project Charter, Project Plan, Risk Management Plan, Change Management Plan, and more. They serve as practical tools for documenting critical project details and facilitating clear and structured reporting.

5. Glossary: Lists comprehensive definitions of key terms and column headings used in the communication matrix. This resource ensures a shared understanding of the terminology employed throughout the communication plan.

References

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