Televisey Workforce Development Project Charter

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# Purpose

Televisey is a company that specializes in video calling software that is streamlined explicitly for easier use by senior citizens and anyone requiring extra assistance with technology. The software is designed for accessibility by anyone with hearing, sight, or motor impairments, with simplified options and a minimalistic UI.

The purpose of this project is to assist in the workforce development process for three departments in Televisey. The Accounting, Sales, and Customer Service departments each pose different dilemmas, such as outdated technology, a lack of experience with online branding and marketing, and an inefficient means of interfacing their targeted older demographic of users. This project aims to rectify those solutions by updating and incorporating new technology and providing training wherever possible in order for employees to continue their responsibilities.

# Duration

This project will occur over a nine-month period, from March 1 to November 30. The project will occur in the three departments, one at a time: Sales from March 1 to May 31, Customer Service from June 1 to August 31, and Accounting from September 1 to November 30. There will be three months allotted to each department.

# Goals and Objectives

Each of the three departments we are focusing on are faced with a unique set of challenges as technology becomes increasingly augmented into the workplace. With this in mind, it is only natural that we have three sets of distinct goals: one for each department. The goal for the Accounting department is to organize and digitize all accounting records. The accounting software currently used by the accounting department is outdated and does not allow for easy and accurate logging of all invoices and purchases. The objective for the accounting department is to implement the latest version of the accounting software, which has more features, including a cloud based service as well as a way to digitize receipts and other paper documents via a mobile device, providing better tracking of all financial transactions within the company. Another objective is to train all employees in the department on how to use the updated software, introducing new and changed features and giving the employees the tools they need to continue their work with as little disturbance as possible.

The goal for the Sales department is to utilize social media to reach a wider audience. Currently, most of Televisey’s online advertising is through website ads. Incorporating social media ads will potentially allow the company to be able to reach a higher percentage of customers than traditional website advertising. One objective is to introduce a social media team that will be able to effectively market Televisey’s software to targeted audiences on current popular social media platforms. Another objective is to establish an online database, to track sales occurring through different methods, such as social media, ads, and other marketing campaigns. This will help determine how successfully social media attracts new customers.

The goal for the Customer Service department is to properly gather and utilize feedback about the current software. One of the objectives is to develop a customer service team to help their users acclimate to using the UI. This will eliminate any preliminary or common issues users have when using the Televisey software. Another objective is to collect user feedback in a variety of ways, such as surveys, focus groups, and beta testing. This allows the customer service team to collect data that can be used to improve the user experience, whether through updates, patches, or further customer support.

# Key Deliverables

One way we will reach our goals is to provide a set of attainable and concrete goals for each department.

**Accounting**

* Deliverable #1: Utilizing Industry Standard Software
* Deliverable #2: Reference guide and instructional videos
* Deliverable #3: Workplace training on how to use new software based on old processes

**Sales**

* Deliverable #1: Functional database with all prior files transferred over/accessible
* Deliverable #2: Reference guide and instructional videos
* Deliverable #3: In-house Presentations on social media marketing/branding

**Customer Service**

* Deliverable #1: A more user-friendly UI with digestible instructional components
* Deliverable #2: Implementing surveys and focus groups to acquire user feedback
* Deliverable #3: Beta testing pursuant to user feedback

# Constraints

The goals that we are aiming for will be met with certain constraints, but if managed correctly, these constraints can guide us towards delivering outcomes that are both attainable and effective. To properly identify these constraints, we’ve split them into the categories of business constraints and technical constraints. For these purposes, business constraints outline obstacles that we will encounter when dealing with the various people and resources involved in this project, while technical constraints outline the issues we may face with the specific solutions that we intend to pursue.

**Business Constraints**

* Resources required for reference videos
* Interference with day-to-day responsibilities while database/software is implemented
* Transferring in-progress files while/after database/software is implemented

**Technical Constraints**

* Technical Knowledge:
  + The accounting department’s average age is 50.2
  + Many of the employees have limited technical knowledge
* Software Compatibility
* Server Space
* Outdated Hardware

# Scope

The scope of our project clearly defines what is and is not inside the boundaries of what we will be pursuing. We’ve listed these points as In-Scope, the aspects of this project that are either being pursued or could be pursued, and Out-Scope, the aspects of this project that we will not be addressing.

**In-Scope**

To make sure that we are staying on track and meeting all of the project needs, we have clearly defined aspects that fall within the scope of this project. To prioritize our scope, we have divided the in-scope into two categories: must have and potential to have. To avoid scope creep and clearly define what this project will not deliver, we have also included what will be out of the scope of this project.

**Must have**

* Accounting
  + Guided video tutorial for employee use of new accounting software
  + Hands-on training for use of accounting software
  + Reference guide for how to perform basic operations, troubleshooting, and shortcuts/tips
  + Installation of Quickbooks on every employee’s computer
  + Training on how to back up data in the cloud
* Sales
  + An established online database for sales records organized by customer ID number, customer name, and date of each use
  + Guided tutorial and reference guide for employee use of online database
  + Training on how to back up data in the cloud
  + Training on how to use social media for branding
* Customer Service
  + Installation of a live chat/video call system for customer support on every employee’s computer
  + Employee training on how to use the live chat system
  + Established customer input surveys
  + Training on how to analyze customer input trends
  + Beta testing for initial launch and updates

**Potential to have**

* Accounting:
  + New devices that support latest version of software
  + Firing employees who cannot adjust to technological shift
* Sales:
  + More training on collecting data from social media from business side
  + Hiring new sales employees to form a social media team
* Customer Service:
  + FAQ page and instructional video for customers
  + Customer focus groups sorted by age range

**Out-Scope**

In all three departments, we will be implementing new software and directing the employees to new ways to use said software. We will also be providing basic tutorials so that they are able to see all of the software’s different components, but we will not be advising them on the “best” or “right” way to use it for their company.

**Does not include:**

* Accounting
  + Data visualization (the metrics by which to determine the company’s monetary success)
* Sales
  + Content creation
  + Training on sales pitches
* Customer Service
  + Training on standard customer service language for live chat system

# Key Stakeholders

We have identified the following individuals as key stakeholders in our project. The people are split into two categories: engaged stakeholders and affected stakeholders. Engaged stakeholders include those who are directly impacted by our progress, while affected stakeholders are those who will be indirectly affected as a result of our completed project.

**Engaged Stakeholders**

* James Williams, CIO, Executive Sponsor
* Michael Donalds, IT Department Manager
* Eric Norman, Accounting Department Manager
* Nina Smith, Sales Department Manager
* Valeria Jones, Customer Service Department Manager
* Accounting, Sales, & Customer Service Employees

**Affected Stakeholders**

* Theresa Cohen, COO
* Customers
* Investors/Shareholders

# Project Benefits and Value

1. Updated software and technology will allow Televisey to remain competitive in an ever-changing and fast paced market.
2. Making use of these new features, Televisey will be able to increase productivity and grow as a company.
3. Company records will be more secure with an updated online database.
4. A revamped customer support system will lead to a more satisfied, and generally happier, consumer base.
5. Losing important files due to outdated and unsupported software will no longer be an issue.
6. Televisey will grow as a brand by utilizing the best market practices for various social media and other online trends.
7. Better understanding common complaints, suggestions, issues from customers will lead to a product that is more user-friendly.
8. The iterative nature of the improved customer support system will make rolling out patches/updates that resolve and improve customer experience much more efficient.

# Measures of Success

Our group will be able to gauge the success of our project by evaluating how the individual changes have impacted the company.

**Accounting**

* Functioning accounting software with little to no crashes
* Employee performance evaluations show successful use of new accounting software
* All files successfully transferred from paper to online database
* All files successfully backed up in the cloud

**Sales**

* Social media marketing shows results in acquiring new customers
* Social media marketing also shows results in retaining existing customers
* All files successfully transferred from paper to online database
* All files successfully backed up in the cloud
* Employee performance evaluations show understanding of branding for the online market

**Customer Service**

* Valuable customer feedback received for future updates/patches
* Input data that shows customer understanding of how to use the new software
* Employee performance evaluations show understanding of how to use live chat system
* Employee performance evaluations show understanding of how to analyze and interpret customer input data

# Acceptance Criteria

Stakeholders will be provided with a project plan that clearly outlines the purpose of the project, along with its main features and a timeline with detailed key milestones. The stakeholders will also be given a communication plan and a risk assessment plan that outlines the potential risks in the implementation of the workforce development program. Once the stakeholders are in agreement with the project management team, the stakeholders will have the opportunity to sign off on the work provided.