

ISSIP Onboarding Project

Sponsor: [ISSIP.org](https://issip.org) / Jim Spohrer

Project Review

Team Members: Adam Qubain, Katelyn Deek, Gonzalo De Ramon, Alexander Aumen, Daniel Litvinchuk

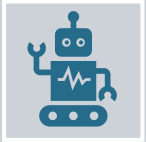
Advisor: Paul Griffin

Date: 2/6/2025

Intellectual Property Rights & NDA: Not Applicable



Project Goal



Purpose: Improve ISSIP's one-hour onboarding process with generative AI for efficiency and scalability.



Review Content: Problem, Objectives, Approach, Schedule, Budget, Deliverables.



Expectation: Feedback and assessment of project readiness for the next phase.



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International Society of Service Innovation Professionals (ISSIP)

ISSIP is a nonprofit focused on service innovation.

Current onboarding is a one-hour manual session with limited scalability.

Goal: Develop AI-assisted and self-service onboarding models for better engagement

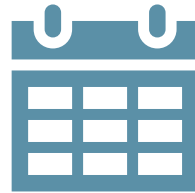


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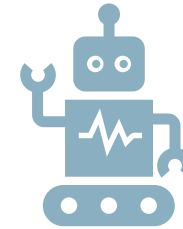
Problem Statement



Current manual onboarding is inefficient and lacks scalability.



Participants need to understand service system innovation, ISSIP platforms, and event calendar.

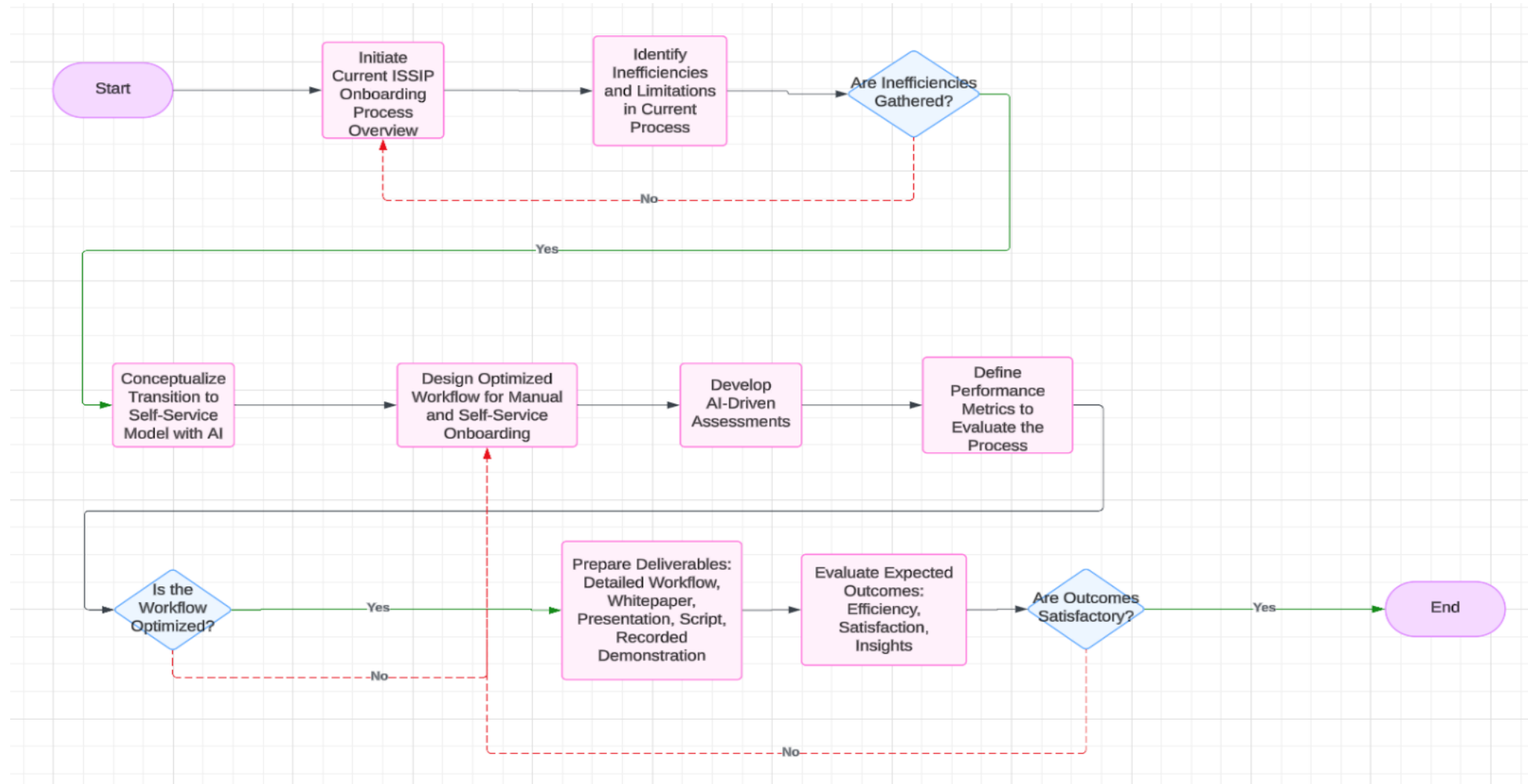


Solution: Hybrid onboarding model (manual, self-service, AI-assisted) for improved engagement.

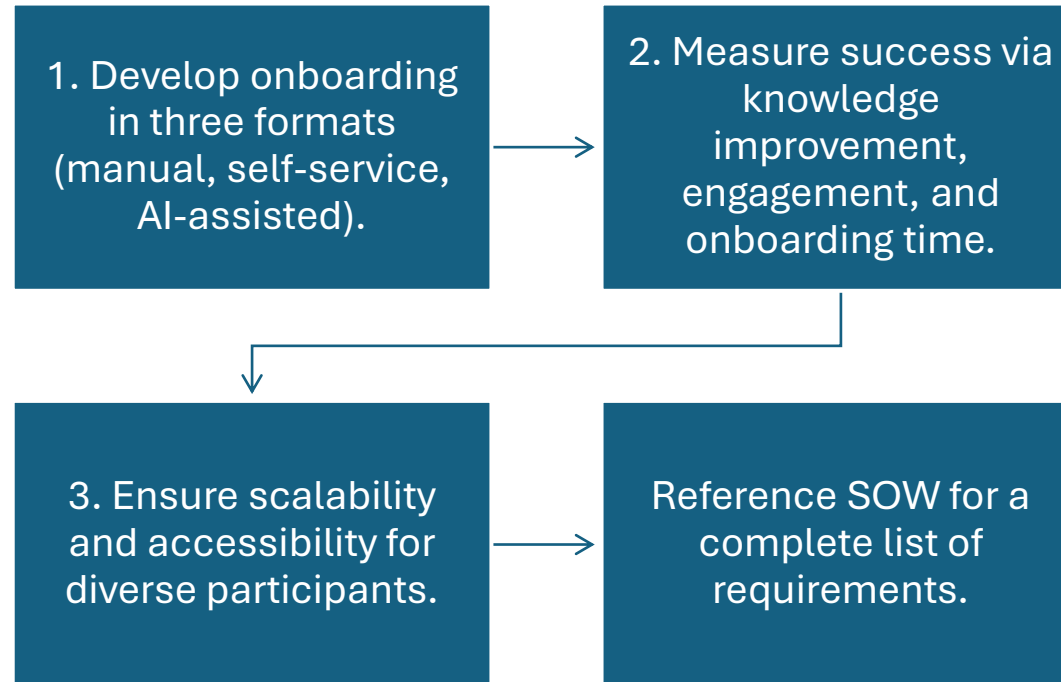


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Problem Statement



Project Objectives



Project objectives

- Develop onboarding in three formats (manual, self-service, AI-assisted)
- Measure success via knowledge improvement, engagement, and onboarding
- Ensure scalability and accessibility for diverse participants

ID	Description	Type	Source	Verification
1	Onboarding must cover service system innovation, ISSIP platforms, and calendar.	Functional	ISSIP Handbook	Content review
2	The process must be delivered in three formats: manual, self-service, AI.	Performance	Project Scope	Test all three methods
3	Self-service modules must be interactive and engaging.	Usability	Stakeholder	User feedback
4	AI-assisted format must adapt to different participants needs.	Adaptability	ISSIP Guidelines	Persona Testing
5	Pre-test and post-test must measure knowledge improvement.	Evaluation	Project Scope	Compare pre and post test results
6	Deliverables must include workflows, presentation, and script.	Deliverable	Sponsor Request	Jim's review and approval
7	Onboarding duration should not exceed one hour format.	Constraint	Stakeholder	Time tracking and evaluation
8	Compliance with ISSIP's ethical code of conduct is required.	Constraint	ISSIP code of conduct	Review and approval by Jim
9	Modules must support participants from many backgrounds.	Inclusivity	ISSIP guidelines	Persona Testing
10	<u>System</u> must be scalable to accommodate an increasing number of participants.	Scalability	ISSIP goals	Stress testing with many users



Approach



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Approach Overview

Week 1-5 Understanding and developing approach

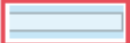

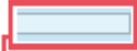
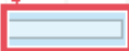
Weeks 6-12 Prototyping and testing

Weeks 13-15 Finalizing and Delivering



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Week 1

Task Name	Start	Finish	Duration <small>(i)</small>	% Complete	Assigned To	Jan 12 S S M T W T F S
<input type="checkbox"/> Empathize	01/13/25	01/17/25	5d	100%		
Form team	01/13/25	01/14/25	2d	100%	Team	
Kickoff (KO)	01/14/25	01/14/25	0	100%	Team	
Research background	01/14/25	01/16/25	2d	100%	Team	
Define the problem	01/15/25	01/17/25	2d	100%	Team	



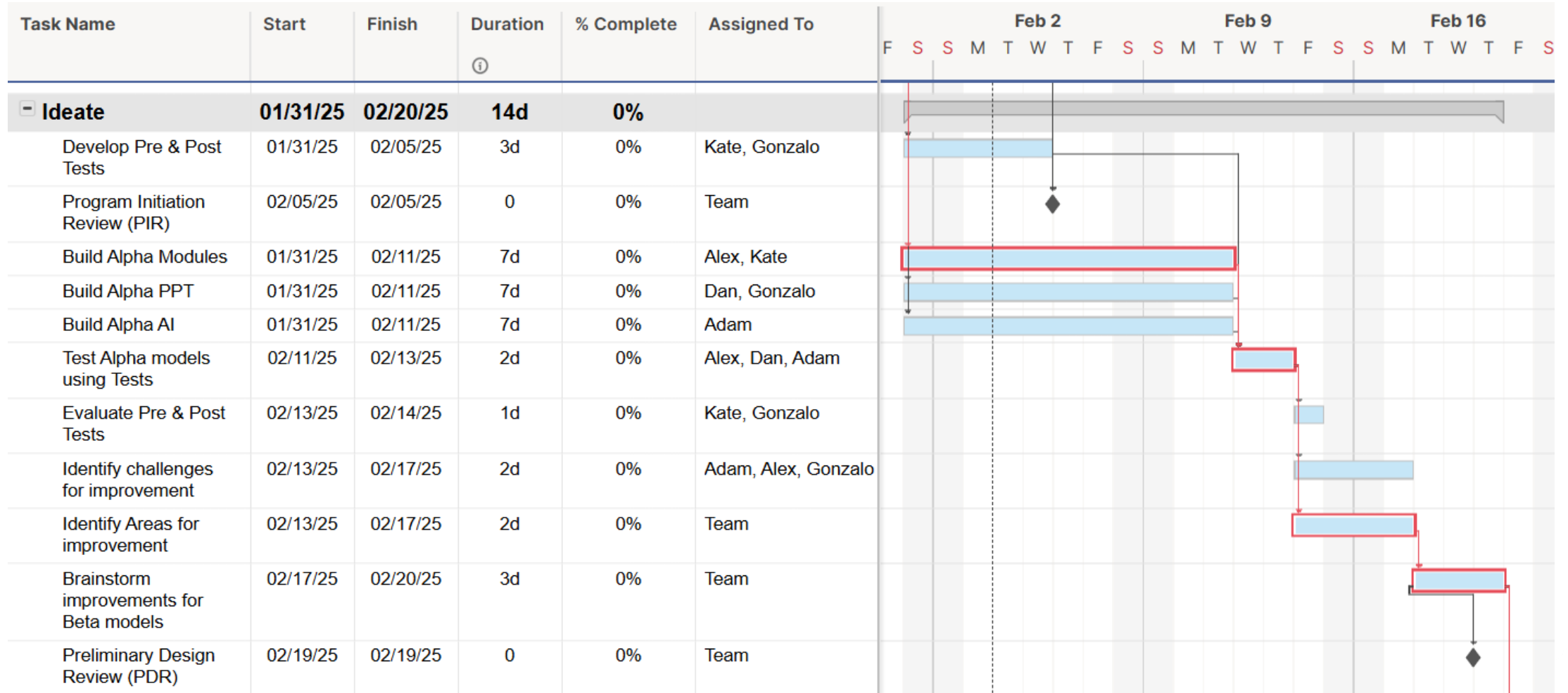
Weeks 2 & 3

Task Name	Start	Finish	Duration	% Complete	Assigned To	Jan 19							Jan 26											
			<div><div></div><div></div></div>			S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
<div><div></div><div>Define</div></div>	01/17/25	01/31/25	10d	93%																				
Generate Preliminary AI Models for Course Content	01/17/25	01/21/25	2d	100%	Team																			
Build schedule	01/17/25	01/22/25	3d	100%	Alex																			
Analyze Pros and Cons of Models	01/21/25	01/22/25	1d	100%	Team																			
Estimate budget	01/22/25	01/23/25	1d	100%	Gonzalo																			
Write Initial Statement-of-Work	01/22/25	01/24/25	2d	100%	Team																			
Compile Important ISSIP dates	01/24/25	01/27/25	1d	100%	Alex																			
Analyze Past ISSIP Capstones	01/24/25	01/27/25	1d	100%	Adam, Gonzalo																			
Gather info from Handbooks	01/24/25	01/28/25	2d	100%	Dan, Kate																			
Write Final Statement-of-Work	01/24/25	01/31/25	5d	100%	Team																			
Compile all info to cover 30 key talking points	01/28/25	01/31/25	3d	50%	Team																			



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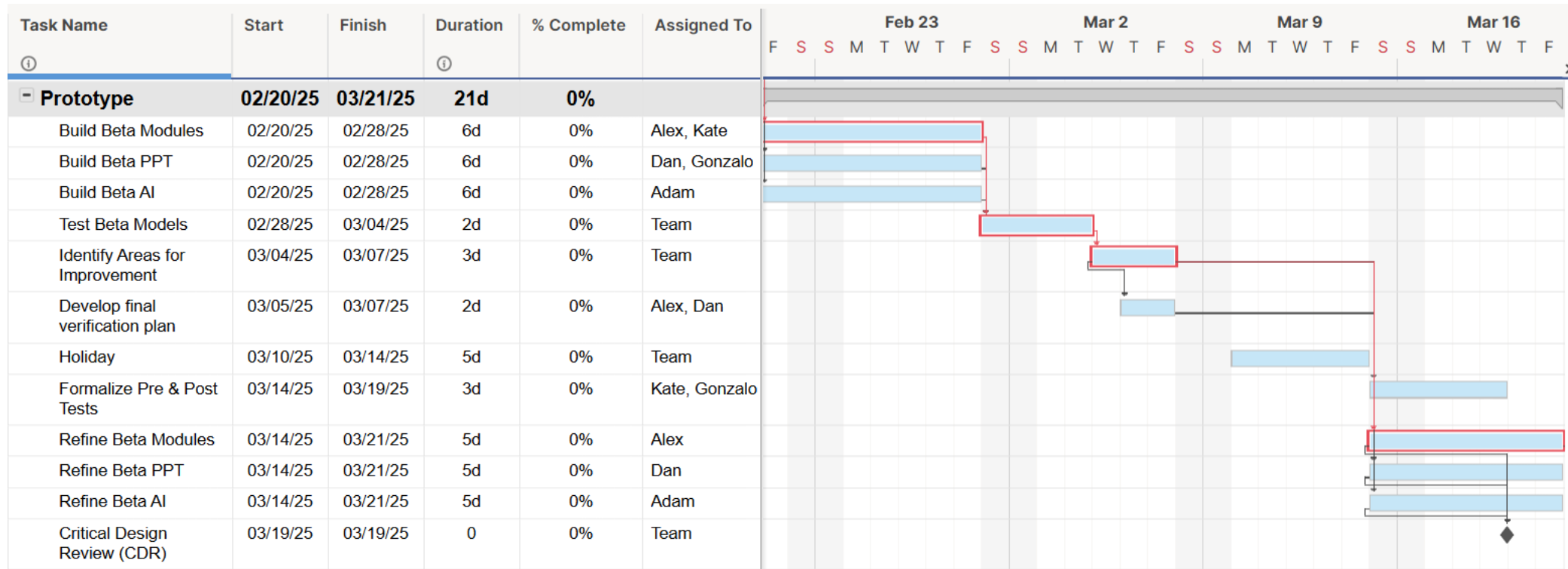
Weeks 4 & 5



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Weeks 6 - 8

■ Prototype



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Weeks 9 - 12

■ Test

Task Name	Start	Finish	Duration	% Complete	Assigned To	<div> <div>Mar 23</div> <div>Mar 30</div> <div>Apr 6</div> </div> <div> F S S M T W T F S S M T W T F S </div>													
<div> <div></div> <div>Test</div> </div>	03/21/25	04/10/25	14d	0%		<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													
Build Site-Integrated Final Modules	03/21/25	04/07/25	11d	0%	Alex, Kate	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													
Build Site-Integrated Final PPT	03/21/25	04/07/25	11d	0%	Dan, Gonzalo	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													
Build Site-Integrated Final AI	03/21/25	04/07/25	11d	0%	Adam	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													
Test final models	04/07/25	04/10/25	3d	0%	Kate, Gonzalo, Adam	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													
Ensure models fit sponsor's specs.	04/07/25	04/10/25	3d	0%	Alex, Dan	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													
Final prototype complete	04/10/25	04/10/25	0	0%	Team	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>													



Weeks 13 - 15

■ Deliver

Task Name	Start	Finish	Duration	% Complete	Assigned To	Apr 13							Apr 20							Apr 27													
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<div><div></div> Deliver</div>	04/10/25	05/02/25	16d	0%		<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div>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Budget



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Budget Overview

- Initial budget: \$1,250
- Expenses to date: \$11.19 (AI subscription)
- Expected total cost: Minimal, as project relies on existing online tools.

\$1,250		
Cost	Date	
\$11.19	1/23/25	Ad

Deliverables

Workflow designs for all onboarding formats.

Interactive pre- and post-assessment tools.

AI-assisted onboarding demonstration.

Performance metrics report.

Final presentation and documentation.

Thank you.
Questions?



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