ISSIP Onboarding Project

Sponsor: 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.



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



Problem Statement



Current manual onboarding is inefficient and lacks scalability.



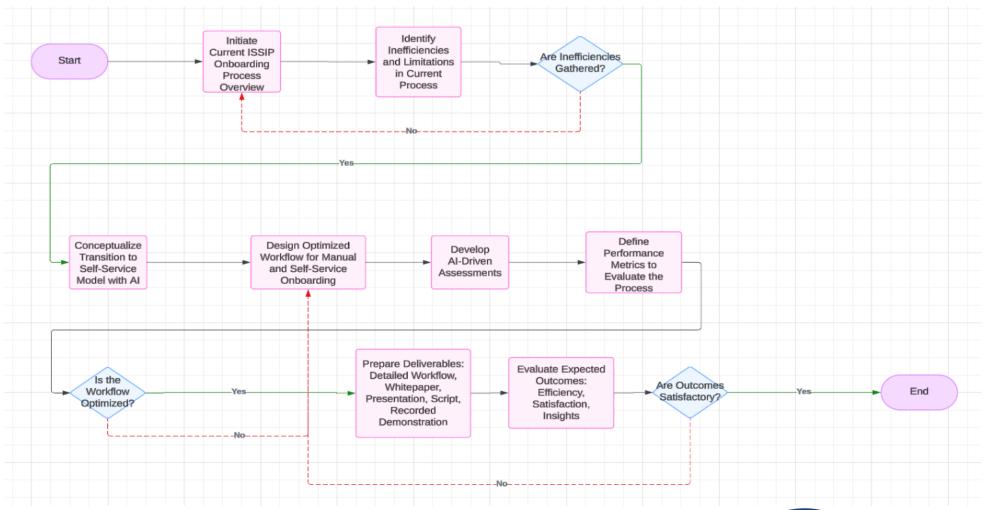
Participants need to understand service system innovation, ISSIP platforms, and event calendar.



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

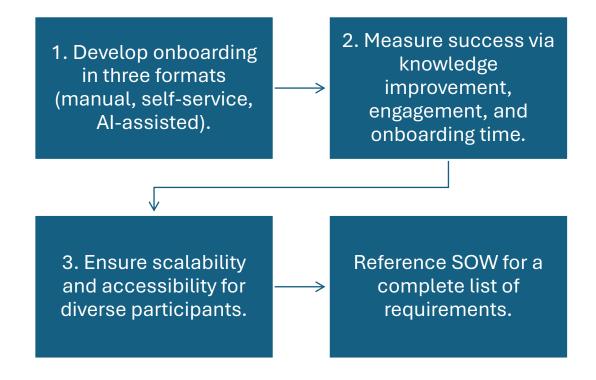


Problem Statement





Project Objectives





Project objectives

- Develop onboarding in three formats (manual, self-service, Al-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	System must be scalable to accommodate an increasing number of participants.	Scalability	ISSIP goals	Stress testing with many users



Approach



Approach Overview

Week 1-5 Understanding and developing aproach

Weeks 6-12 Prototyping and testing

Weeks 13-15 Finalizing and Delivering



Week 1

Task Name	Start	Finish	Duration (i)	% Complete	Assigned To	Jan 12 S S M T W T F S
☐ 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	, in the second
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					Jar	19						Ja	n 20	6			
			(i)			S	S	М	Т	· V	V 7	T F	= (S	S I	M	Т	W	Т	F	S	S
□ Define	01/17/25	01/31/25	10d	93%																		
Generate Preliminary Al Models for Course Content	01/17/25	01/21/25	2d	100%	Team					1												
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					Ė												
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						Ė											
Compile Important ISSIP dates	01/24/25	01/27/25	1d	100%	Alex								Ĭ									
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												Ċ					

PennState

Weeks 4 & 5

Task Name	Start	Finish	Duration	% Complete	Assigned To					Fe	b 2					Fe	b 9)					Feb	16		
			(i)			F	S	S	М	T V	V T	F	S	S	М	Т	W	Т	F	S	S I	M -	Γ V	/ T	F	S
☐ Ideate	01/31/25	02/20/25	14d	0%																						
Develop Pre & Post Tests	01/31/25	02/05/25	3d	0%	Kate, Gonzalo	i					H				+											
Program Initiation Review (PIR)	02/05/25	02/05/25	0	0%	Team						•															
Build Alpha Modules	01/31/25	02/11/25	7d	0%	Alex, Kate	[
Build Alpha PPT	01/31/25	02/11/25	7d	0%	Dan, Gonzalo	i																				
Build Alpha Al	01/31/25	02/11/25	7d	0%	Adam		+																			
Test Alpha models using Tests	02/11/25	02/13/25	2d	0%	Alex, Dan, Adam											Ċ										
Evaluate Pre & Post Tests	02/13/25	02/14/25	1d	0%	Kate, Gonzalo													Ĭ								
Identify challenges for improvement	02/13/25	02/17/25	2d	0%	Adam, Alex, Gonzalo													Ĭ								
Identify Areas for improvement	02/13/25	02/17/25	2d	0%	Team													Ľ	Ħ	Ť						
Brainstorm improvements for Beta models	02/17/25	02/20/25	3d	0%	Team																	Ļ		Ī	_	
Preliminary Design Review (PDR)	02/19/25	02/19/25	0	0%	Team																			•		



Weeks 6 - 8

Prototype

Task Name	Start	Finish	Duration	% Complete	Assigned To		F	eb 23				ı	Mar 2					Mai	r 9				N	/lar 1	6	
①			(i)			F S S	М Т	W T	F	S	S M	Т	W	T	S	S	М	T W	/ T	F	S	S N	И Т	W	Т	=
■ Prototype	02/20/25	03/21/25	21d	0%																						
Build Beta Modules	02/20/25	02/28/25	6d	0%	Alex, Kate					ļ																
Build Beta PPT	02/20/25	02/28/25	6d	0%	Dan, Gonzalo																					
Build Beta Al	02/20/25	02/28/25	6d	0%	Adam																					
Test Beta Models	02/28/25	03/04/25	2d	0%	Team				[+],													
Identify Areas for Improvement	03/04/25	03/07/25	3d	0%	Team										_		Н				1					
Develop final verification plan	03/05/25	03/07/25	2d	0%	Alex, Dan								•				Н									
Holiday	03/10/25	03/14/25	5d	0%	Team																					
Formalize Pre & Post Tests	03/14/25	03/19/25	3d	0%	Kate, Gonzalo															ĺ						
Refine Beta Modules	03/14/25	03/21/25	5d	0%	Alex															j,						
Refine Beta PPT	03/14/25	03/21/25	5d	0%	Dan															F						
Refine Beta Al	03/14/25	03/21/25	5d	0%	Adam															Į.	+					
Critical Design Review (CDR)	03/19/25	03/19/25	0	0%	Team																			•	•	



Weeks 9 - 12

Test

Task Name	Start	Finish	Duration	% Complete	Assigned To					M	ar 23	3				N	1ar 3	30					Apr	6	
			(i)			F	S	S	М	Т	W	Т	F S	5 5	S M	Т	W	Т	F	S	S M	Т	W	Т	F S
□ Test	03/21/25	04/10/25	14d	0%		[
Build Site-Integrated Final Modules	03/21/25	04/07/25	11d	0%	Alex, Kate	ĺ								Ť								4			
Build Site-Integrated Final PPT	03/21/25	04/07/25	11d	0%	Dan, Gonzalo	i																-			
Build Site-Integrated Final AI	03/21/25	04/07/25	11d	0%	Adam	i	+															-			
Test final models	04/07/25	04/10/25	3d	0%	Kate, Gonzalo, Adam																	Ċ			
Ensure models fit sponsor's specs.	04/07/25	04/10/25	3d	0%	Alex, Dan																	+			
Final prototype complete	04/10/25	04/10/25	0	0%	Team																			•	



Weeks 13 - 15

Deliver

Task Name	Start	Finish	Duration (i)	% Complete	Assigned To	Т	F	S	S	М	 or 13 W	T F	S	S	М	Ap	r 20 N T	F	S	S	М .	Apr	27 / T	F	S
□ Deliver	04/10/25	05/02/25	16d	0%																					
Draft final deliverables	04/10/25	04/18/25	6d	0%	Team		Ė						4												
Finalize deliverables	04/18/25	04/25/25	5d	0%	Team								Ů.												
Showcase	04/29/25	04/29/25	0	0%	Team																	.			
Program Closeout Review (PCR)	04/30/25	04/30/25	0	0%	Team																		—		
Send all deliverables	05/01/25	05/02/25	1d	0%	Dan																			Ť	



Budget



Budget Overview

- Initial budget: \$1,250
- Expenses to date: \$11.19 (Al 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.

Al-assisted onboarding demonstration.

Performance metrics report.

Final presentation and documentation.



Thank you. Questions?

