

XX Training & Development xxx! University Design Build

Project Charter

Client



xxx Technologies
Columbus | Ohio

Designer/Developer



Connect. Solved.
Columbus | Ohio

Project Sponsor:

xxxx xxxxx
VP, Systems Integration

Prepared:
[date]



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Executive Summary

Today's technology organizations are experiencing increasingly complex challenges when it comes to meeting learning and development needs. Domestic and global employment forecasts have consistently pointed to impending talent shortages, especially in technical fields. The effects of such talent shortages are expected to lead to increased difficulties attracting and retaining talent. To that end, organizational learning delivery methods must be easily accessible, more sophisticated, and highly flexible. Additionally, scarce resources will dictate that formal and informal learning must be tailored to the needs of specific industries to facilitate continuous learning.

In response to evolving business needs, eLearning delivery for organizational development has become the most effective way to anticipate and meet such requirements. The project charter for xxxx! University sets forth a targeted plan to address learning delivery based on client needs and required job knowledge, for today and tomorrow. xxxx! University represents an opportunity to enhance existing learning and development efforts while leveraging technology tools to become more effective and efficient.

Because the platform and tools used for development are scalable, the xxxx! University Project sets forth a replicable template for further development and delivery of courses which will include a robust and persistent technical knowledge base framework.

*The growth and development of people
is the highest calling of leadership.*

*~ Harvey S. Firestone, founder
Firestone Tire & Rubber Company*

Project Purpose & Justification

Business Need/Case

xxxx! Technologies, Systems Integration's (SI) business strategy utilized technological forecasting and strategy tools to assess potential business opportunities. To successfully meet the needs of clients now and in the future, optimization of talent is crucial. Projections for the availability of talent strongly indicate there will be a massive talent shortage across industries, and that the pool of available technology talent will be especially hard-hit.

The narrowing opportunity to attract and retain technology talent represents a future constraint. In preparing for what is on the horizon, SI seeks not only to hire the best talent in the industry but also to invest in current talent while building organizational memory.

xxxx! Technologies is preparing for the implementation of a new payroll and talent management system, Paylocity. Included in this initiative will be the refinement of the current onboarding system in which new hire forms can be completed and other transactional items can occur via Paylocity's online portal. xxxx! University (xxxx! U) will dovetail off of the onboarding system to provide specific training for technical competencies as well as targeted business acumen.

As expected, there will be several inherent challenges in building and rollout of a large undertaking such as xxxx! U. For purposes of successful development, design, and testing, the following key challenges emerge:

Resources: Because the SI division is continuing to grow sales, and thereby revenue, the need to acquire new talent while retaining existing talent conflicts with the ever-growing workload of the division. Therefore, it may be difficult to connect with subject matter experts (SMEs).

Time: The entire development, design, and testing of xxxx! U must be accelerated to accommodate handling current work while building bench strength for the future.

Organizational Memory: A persistent challenge in any technology organization is to successfully capture and formalize organizational knowledge in the form of a technical knowledge base. There has not yet been a way to ensure such documentation occurs due to the challenges of scarce resources.



(Business need/case continued)

In the past, training has been mostly reliant upon the knowledge of the SMEs, who are crucial to the organization's success. Because SI's business is growing and day-to-day operational responsibilities are increasing, there is a continually burgeoning need to make the process more productive for all concerned.

SI's leadership continues to enact its clear commitment to investing in their people and xxxx! U represents a strategic increase in that level of commitment. Because of the strategic trajectory of SI, it is important to ensure that SME time and energy be directed to where it is needed most: maintaining and growing the day-to-day business. By reducing the amount of SME resources spent on introductory topics and training, SME resources can, therefore, be utilized to mentor and train on higher-level topics.

A blended learning method (i.e. face-to-face and eLearning) will best satisfy the criteria of its strategic mandate.

Business Objectives

Through this project, several critical SI business objectives will be met, as follows:

1. Maintain and continue to build upon a high level of success in aiding SI's new associates to feel welcomed, valued, and prepared by ensuring that each has the opportunity to:
 - a. Fully assimilate into the company shortly after their start date
 - b. Align themselves with critical SI business strategies and organizational culture
 - c. Reduce the second-guessing that often comes from starting a new job, thus improving retention
 - d. Connect with the people in their area and across the company
 - e. Feel confident in their future at xxxx! Technologies



(Business Objectives continued)

2. Ensure those new associates are prepared to maintain the highest ethical standards in their execution of their duties.
3. Reduce the impact of transition from the onboarding process to specific job task training by creating the expectation that all learning and development that will be immediately useful on the job.
 - a. Momentum from the onboarding transition to targeted learning delivery will be maintained by achieving 99% completion of the total onboarding and initial training process within a prescribed time frame (e.g., within x number of days from start date).
4. Reduce costs associated with the current method of learning and development from the year on year average of \$_____ per annum to a projected average of \$_____ per annum (a ___% reduction), achieved by the end of fiscal year 20__.
5. Achieve a ___% to ___% internal rate of return on the project over the years 20__ through 20__.
6. Continue to build a desirable employer brand by showcasing xxxx! University selected "teaser" (i.e., ungated) content to aid in brand awareness and reach, recruitment, retention, and ongoing professional development.



Project Description

The xxxx! U project brings material that has been presented face-to-face, in online reading sources, and in other professional development modalities to a cross-device platform. WordPress has been selected as the platform for development due to stability, customization, integration, and migration. The theme Eduma will be used in conjunction with the LearnPress plugin (among others) to build and deliver customized learning.

xxxx! U content will be built upon current best practices from business acumen and specialized technical mastery perspectives. The goal is to provide a learning experience that communicates and delivers on the promise to help associates realize their greatest potential from their very first day on the job.

xxxx! U represents a foundational belief that learning experiences should reflect the acquisition of new knowledge, skills, and abilities (KSAs) that provide pathways to rewarding challenges. While we want every new associate to be excited about their decision to sign-on with xxxx! Technologies, we also want them to remain excited about staying.

To accomplish all of these objectives, SI will sponsor and pilot a custom training delivery development and design project. Columbus-based learning design firm [Connect. Solved.](#) has been contracted to complete the project and provide insight as to next steps beyond the scope of the instant project.

Objectives

The comprehensive objective of the xxxx! U project is to:

1. Further enhance and build upon the success of existing employer branding, onboarding, and training:
 - a. Position new SI associates to sooner experience the positive dynamics of their jobs to provide a strong foundation for future motivation to bring their best to their work.
 - b. Focus on initial training topics that are critical to getting new hires up and running as soon as possible
 - c. Facilitate the opportunity for current associates to enhance existing KSAs



(Project Objectives continued)

- d. Build a formal repository of organizational knowledge in the form of a knowledge base that will be essential for cross-training, up-skilling, and general professional growth
 - e. Present all learning in an online, asynchronous environment in an engaging and interactive way through the use of media-rich content and simulations (where feasible)
 - f. Ensure consistency in organizational learning delivery and streamline existing organizational knowledge for efficiency
2. Help SI associates realize their greatest potential from their very first day on the job:
 - a. Inspire new associates by highlighting success stories and lessons learned throughout xxxx! U's content
 - b. Foster a sense of empowerment that demonstrates potential short and long term career options
 - c. Capitalize upon career empowerment with the objective of increasing retention and reducing turnover.
 3. Infuse newly hired associates with the spirit and ethos of xxxx! Technologies, including our belief that our associates are valued subject matter experts within our industry.

Project Requirements

The xxx! U project must deliver:

1. Learning content that generates a high level of learner engagement, thus engrossing the learner from the start and hold their interest throughout
2. Appropriate formats for existing materials (preferably branded where feasible) that capitalize on the strengths of both the material and the delivery method
3. An integrated learning experience with theoretical underpinnings of appropriate adult learning methodologies, cognitive processes, and behavioral science
4. Robust technology solutions that will work flawlessly as an expandable resource and template for further learning project development



(Project Requirements continued)

5. Materials and job aids relevant to the technical and general knowledge required to ensure learning transfer
6. A complementary component to the new associate onboarding process that sets the stage for continuous improvement through lifelong learning
7. A knowledge management component, including glossaries, vendor product information, lessons learned, and best practices that will be cross-referenced throughout various courses and modules

Project Constraints

The xxxx! U project must be completed, tested, and fully operational by close-of-business _____, firm.

All xxx! U modules and associated materials within this project must be complete and ready to be deployed (i.e., tested) no later than close-of-business _____.

The total cost of the xxxx! U project and any related billable expenses (including research, communications, printing, testing, technology procurement) must not exceed _____.

Final decisions concerning scope and quality will be determined by the project team, which includes key stakeholders, in consultation with *Connect. Solved.*

Project Assumptions

The successful completion of the xxxx! U project depends on the accuracy of these assumptions:

1. The project's key stakeholders will convene with *Connect. Solved.* during the project analysis stage, providing substantive input that will help ensure the project objectives are identified and met.
2. The project sponsor will ensure that any existing materials and any associated materials relating to the learning objectives, including product/vendor documentation, will be available to *Connect. Solved.* for the duration of the project.
3. SI will provide subject matter expertise on an as-needed basis throughout the project.



(Project Assumptions continued)

4. Upon completion of the xxxx! U project, xxxx! will assume the responsibility for deployment within its organization, including all communications with associates and other key stakeholders.
5. xxxx!'s Information Technology department will assume responsibility for the handoff processes, procedures, and other implementation concerns, according to their standard operating procedures, which are outside of the scope of this project.
6. Subsequent to project close, Human Resources will continue to work with SI leadership in developing new content for that division, including development, design, testing, and deployment of any and all content outside of the scope of this project, unless otherwise governed separately.
7. Maintenance of the platform will be solely the responsibility of xxxx!, unless otherwise governed separately.
8. By virtue of project approval, all project pricing and other proprietary information exchanged between **Connect.Solved.** and xxxx! Technologies will be governed by appropriate confidentiality and intellectual property mechanisms.

Upon execution of this project charter document, all parties agree upon the reliability of these assumptions and agree to abide by the inherent and expressed project expectations.



Preliminary Scope Statement

The xxx! U project will create a blended learning portal for new and existing associates that will replace _____% of the current F2F training content.

Consulting Aspects

Connect. Solved. will provide breadth and depth of consulting experience and instructional knowledge to recommend the most effective and sustainable development, design, and delivery. Best practices will be utilized inherently throughout the project including foundational elements of instructional technology development, instructional design and delivery, and the practitioner knowledge from the disciplines of HRD and technology management.

Recommendations will be provided for next steps in organizational learning development including a suggested plan for badges and achievement certificates.

Technology Selection and Development

1. Assess and select the appropriate delivery tool, platform, plugins, theme, for corporate learning management system (LMS) purposes.
2. Develop LMS architecture, focusing on UX/UI, learning best practices, and behavioral and cognitive science.
3. Incorporate link(s) to the Careers section of xxx's website.

Course Content Development

1. Utilize pre-employment testing and learner persona development to analyze and identify the appropriate tools and methods for the span of end-users
2. Identify existing content relevant to selected courses through SME
3. Sequence material
4. Determine branded content to be developed
5. Leverage rapid development tools to finalize content as necessary



Preliminary Scope Statement continued

Course Set A: Develop three (3) series of general courses, including approximately eighteen (18) modules, from end-to-end, including content sequence and assessment tools:

1. Leadership (six (6) [mini]courses)
2. Project Management (six (6) [mini]courses)
 - Customized content for the PM series includes templates and processes as they are used within the division.
3. OpX [operational excellence] (six (6) [mini]courses)

Course Set B: Develop two (2) technician/lead technician (role-specific) technical training short series:

1. Rack prep training on products
2. Rack prep build

Estimations of completion time for each learning module or component will be included, thereby providing a benchmark for estimating the complete onboarding and new hire training initiatives owned by xxxx!'s HR department.

Knowledge Base: The xxxx! U project will include the development of a technical knowledge base framework that will be utilized for continuous learning and improvement efforts. The knowledge base will be cross-referenced throughout learning content developed within this project and will serve as a persistent reference for new and existing SI associates.

The knowledge base will be a custom-designed, flexible solution where entries will be indexed by categories and tags. An interactive search capability, based upon categories and tags, will be included. Additional content will be populated by xxxx! outside of the scope of this project.

Handoff

The resulting eLearning components will be deployed via a gated Internet portal and, after project sign-off, will be hosted by xxx!'s servers/hosting. Simultaneous with development and design, hosting configurations, platform behaviors, theme functions, and all plugins will be continuously tested. Components will be debugged throughout all phases of build, including Alpha and Beta testing processes.



Preliminary Scope Statement continued

Detailed technical notes will be kept concerning any known vulnerabilities concerning build components. Full handoff support will be provided, including instructions to change email addresses to port the project to xxxx!'s hosting. Contact and support information for developers will be provided for theme, plugin, or other related follow up questions and/or technical support.

xxxx! Technologies will assume all responsibility regarding policies relating to any aspects of privacy and use of technology, where applicable.



Project Risks

The following risks have been identified in connection with the xxxx! U project:

1. xxxx!'s SI division resources are stretched due to due to business growth and the rollout of an eLearning T&D platform represents a small subset of the total projects underway.
The result may be that the xxxx! U project does not receive the level of corporate attention, and perhaps [inadvertently] cooperation required for completion and implementation.
2. Key project team members, especially those designated as project SMEs, may not be able to provide the level of involvement required of them at various phases of the project. This may result in incomplete information sets and a lack of guidance about desired changes to the F2F program currently in use.
3. As of yet, no designee within the Creative Services division has been designated as a supporter of the project. This may result in a lack of support for the aspect of the project that depends on Internet deployment (i.e., having access to make the changes necessary on the WordPress platform or servers).



Quality Management

Two stages of testing will be utilized to improve the quality of the portal and its content:

1. Alpha testing will be conducted to improve quality of product and ensure Beta readiness. Alpha testing will occur toward the middle of Phase 2 and involve reviewers with checklists for guidance. As a result of early feedback, most known critical issues will be fixed, and some features may be changed or be added. Within the context of this project, the definition of acceptable alpha test criteria will establish clear benchmarks and will provide enough information to determine whether or not design criteria have initially been met.
2. Toward the end of Phase 2, Beta testing will be conducted to improve quality, integrate stakeholder input, and ensure release readiness. For purposes of this project, Beta testing may involve marketing, IT support, and other potential end-user stakeholders. The goal of Beta testing will be to simulate the use of the xxxx! U portal and knowledge base and feedback may cover any part of all of the deliverables. Expectations for this stage of testing include that most, if not all, of the deliverables for the project will be completed.

Beta testing key point: Much of the feedback collected will likely be most relevant to future versions of xxxx! U. Only the most important/critical changes that adhere to the project scope will be made. Beta tests are designed to explore the limits of project deliverables by allowing testers to explore every element of the end product in their native environments.



Integration Management

In addition to the items mentioned above, all integration with existing or new technologies and backend management (e.g., enrollment) will be the sole responsibility of xxxx! Technologies.



Communication Management

Audience	Category	Information	Method	Frequency	Detail	Owner
CPT	Execution, Status	Core team project progress, accomplishments, issues, challenges	Project Forums, email or phone if necessary	Ongoing, Weekly	Action	PM
CPT	Status	High-level status	Project Forums	Weekly	Information, Action	PM
CPT	Execution	Issues and Challenges	Status Report	Weekly	Action	PM
CPT	Status	Detailed Status	Status Meeting	Bi-weekly	Information, Action	PM
EPT	Status	High-level status	Meeting (Other)	As needed	Information, Action	Sponsor
Management	Execution, Status	Progress, significant accomplishments, timeline	Meeting (Other)	As needed	Information	Sponsor
EPT	General Information, Status	High-level status	TBD	Ongoing	Information	Sponsor

CPT = Core Project Team

EPT = Extended Project Team



Project Deliverables

The following deliverables have been identified as appropriate for the xxxx! U project:

Project Management

- Course 1: Overview of PM
- Course 2: Project Initiation
- Course 3: Project Planning
- Course 4: Project Execution
- Course 5: Project Performance and Control
- Course 6: Project Close

Leadership

- Course 1: Excellence in Leadership
- Course 2: Facilitation
- Course 3: Visioning
- Course 4: Situational Leadership
- Course 5: Managing Conflict
- Course 6: Coaching & Mentoring

OpX (Operational Excellence)

- Course 1: Roadmap to Operational Excellence
- Course 2: People, Culture, & Organizations
- Course 3: Finance
- Course 4: Technology
- Course 5: Business Practices
- Course 6: Lean Thinking

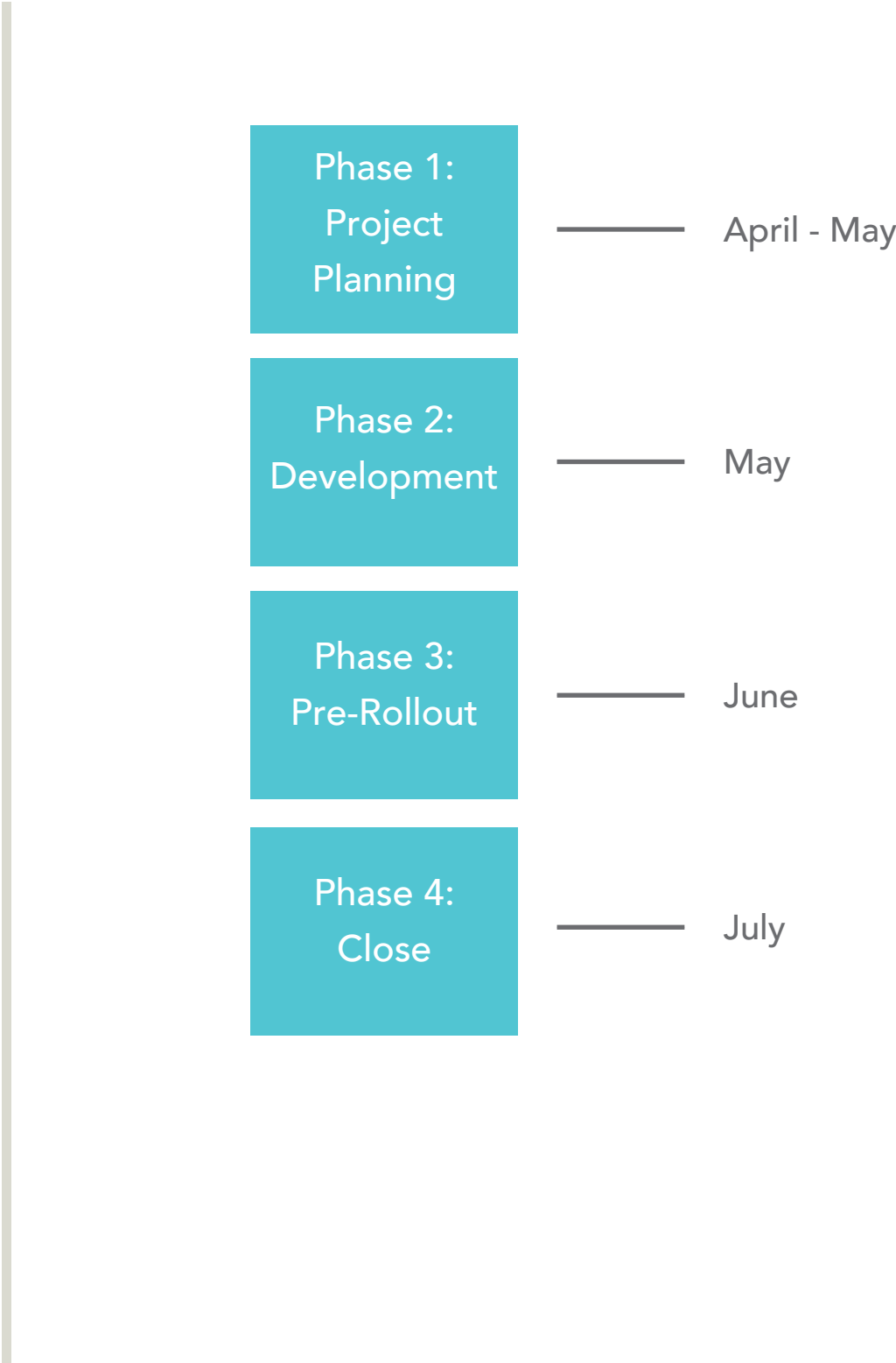
Rack Preparation (Lead Technician/Technician, role specific)

- Course 1: Build
- Course 2: Products

- A list of modules of courses that will not be gated to assist in employer branding efforts
- Print-based material, job aids, assessment content/metrics, and other relevant media will be developed by *Connect. Solved.* in partnership with SMEs
- While every effort will be made to develop media-rich, branded content, it is recognized that there will be constraints concerning SME availability and available resources for development



Summary Milestone Schedule



Project Roles

Joe Smith, VP of SI, xxx! Technologies; will be the project sponsor and will be responsible for sign-off on the project as well as any procurement of development tools such as templates or plugins.

Jane Fabetz, Recruitment and Training Manager, xxx! Technologies; will be a Core team member, responsible for all tasks relating to HRM, and project stakeholder. Ms. Fabetz will also be responsible for all associate communications and will consult on all project activities.

Al Jones, Operations Manager, SI, xxx! Technologies will act as an SME and be responsible for content relating to types of training.

Steve Jobs, Information Technologies Manager, xxx! Technologies will consult on packaging and porting the xxx! U site and assist with integration and launch.

Cori Zuppo, Principal of [Connect. Solved.](#) will act as the project manager for the duration of the xxx! U project. In this role, the PM will supervise all tasks and scheduling of the project, including status report and other relevant communications.



Project Approval Requirements

Change Management

A Scope Change Request must be completed for any changes to the scope outlined herein. Requests must include an explanation of how the requested change will affect a specific task, deliverables, schedule, or other items; a description of the change will be required to describe details of the desired change, including affected tasks, dates, team responsibilities, and deliverables. Approval for requested changes must be signed off by the project sponsor before initiating the change.

Project Sign-off

The xxxx! U project will be considered complete when *Connect. Solved.* has delivered all aforementioned eLearning modules with associated documents, job aids, documentation, and other materials (digital or otherwise), as well as a tested and debugged platform, including the framework for a knowledge base. It will be the responsibility of *Connect. Solved.* to ensure that modules are fully operational on the platform, with xxxx! Technologies agreeing to provide internal support for migration, rollout, and maintenance upon delivery.

All items will be delivered to xxxx! U project sponsor, Joe Smith. Mr. Smith will provide the final sign-off indicating the official completion of the project.



Authorization

The purpose of this document is to provide a vehicle for the initial planning efforts for the project. It is used to reach a satisfactory level of agreement among the Project Manager, Project Sponsors, and Owners on the objectives and scope before significant resources are committed and expenses incurred.

I have reviewed the information contained in the above Project Charter, including the Statement of Scope and agree:

Name

Signature

Date



Appendix A: Onboarding Sequence to Training

The purpose of this section is to document the general outline and time estimate(s) of HR's portion of the onboarding process. This will allow for more streamlined and predictable timelines and transitions from onboarding to job-specific training.



Appendix B: About xxxx! Technologies

Narrative about xxxx! as a company that narrows to the SI Division and the growth over the past 1-2 years. Echos the project need and business objectives.



Appendix C: About Connect. Solved

Connect. Solved. is a design and consulting firm specializing in HRM, HRD, and technology management. We provide content development strategies and execution ranging from digital marketing and social media strategy to complex, interactive projects such as LMS application designed solutions. Through the discipline of project management, we leverage our comprehensive practitioner and instructional design experience to assist our clients in optimizing learning processes, organizational effectiveness, and knowledge management.

With years of experience in developing learning content for academic and industry applications, our work spans the complexity spectrum and leverages a wide range of technology tools and methodologies. **Connect. Solved.** provides a comprehensive range of customized solutions from ideation to execution. Our focus is on effectiveness and efficiency and we draw from expertise in the subject matter, technology, and process domains.

Connect. Solved. offers innovative applications of existing and emerging technology tools and exists solely to enhance the ability of all types of organizations to achieve strategic business goals. We take the time to understand the dynamics of the end-user and endeavor to provide them with the best user experience possible through solid user interface design and application.

Our work is inextricably aligned with industry best practices and flexibility to deliver world-class solutions tailored specifically to the goals and objectives of our clients. **Connect. Solved.** utilizes an open approach to collaboration and partnership with experts from various disciplines to provide industry-specific solutions.



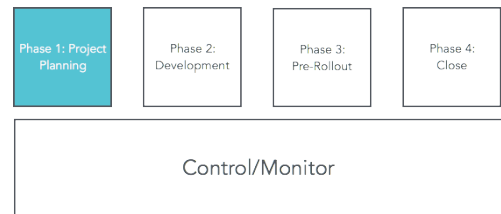
Conceptualize, innovate, synergize, and deliver.

Appendix D: High-level Project Plan

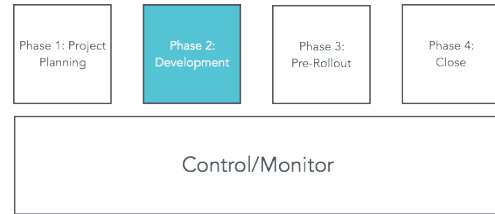
PHASE 1

Project Planning

- 1.1 - Determine project scope
 - Preliminary estimate of materials to be created
 - Preliminary materials specifications
 - Project schedule and/or time estimate
 - Budget and/or cost estimate
- 1.2 - Organize project
 - 1.2.1 - Confirm assumptions, develop detailed plans
 - Confirm earlier assumptions about materials, specifications, time, and costs
 - Confirm project team members
 - Set up project diary
 - Organize Kickoff meeting



PHASE 2 Development



- 2.1 - Detailed information is gathered concerning
 - the target audience of the training
 - the trainees' relevant work environment
 - the specific tasks which must be learned
 - technical details about the course content

- 2.2 - Develop the Blueprint (design specifications)
 - Review content and strategy
 - Develop big picture description of the instructional materials and course flow
 - identify/develop specific performance objectives
 - identify specific instructional strategies to be employed to attain each objective
 - detailed outline of content to be included in support of each objective
 - summary of media and materials to be created to support each objective
 - formal approval of the blueprint by the project sponsor

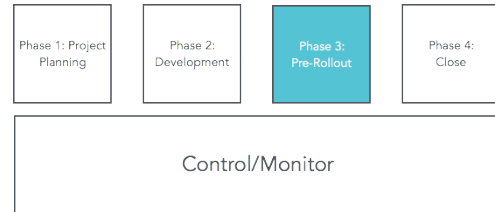
- 2.3 - Produce revised drafts of all materials and secure formal approval of drafts by project sponsor

- 2.4 - Conduct Alpha testing with project team members as reviewers
 - Gather a list of detailed revision specifications and get them approved by sponsor.

- 2.5 - Finalize master materials that also may be used to create correspondingly high-quality reproductions and obtain formal approval of the masters by project sponsor.

PHASE 3

Pre-Rollout

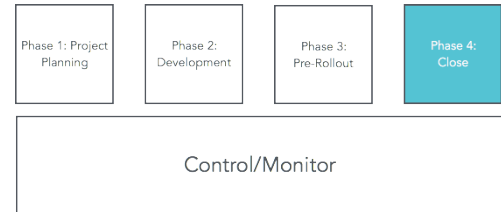


- 3.1 - Prepare portal for Beta testing and ensure agreed-upon Alpha test revisions have been made
- 3.2 - Communicate with second phase of reviewers and provide instructions and deadlines
- 3.3 - Debrief project team and evaluate Beta test results and list final (non-substantive) revisions
 - Incorporate recommendations from Beta test and obtain approval from project sponsor.
 - Identify master materials to be used as rapid development tools for the future, obtain approval from sponsor
 - Communicate with all stakeholders announcing the site is live and inviting feedback via a contact form on the site [for internal use only]
- 3.4 - Develop punchlist



PHASE 4

Project Close



- 4.1 - Conduct post-implementation review
 - Conduct a gap analysis to evaluate how closely the planned requirements, schedule, and budget were linked to each other and what results were actually delivered, when and for how much.
 - Use project success metrics to evaluate the efficiency of the project management practices.
 - Capture and document project closure sample practices and procedures that led the project to success.
 - Make a post implementation review report and include all appropriate documentation, such as quality assurance reports, survey results, project performance reports, etc.
- 4.2 - Capture lessons learned
- 4.3 - Transfer and release
- 4.4 - Financial Closure
- 4.5 - Project Archive
- 4.6 - Celebration



Project Performance & Control

Throughout each phase and milestone of the project, controls, approvals, and reporting procedures have been outlined to ensure the status of the project and any unresolved issues have been communicated and resolved. All exceptions to what is contained within this project charter will be handled as governed herein, in similar fashion.

