

PROJECT CHARTER: Case Study

Scenario

As the Plant Pals project manager, one of your responsibilities is building an Operations and Training plan for the new service. The creation and implementation of this plan marks a new stage of the Plant Pals project with its own set of goals and deliverables. Its main goal is to create sustainable fulfillment and delivery practices for the service's day-to-day operations. Putting these processes in place is essential to making a launch of this size successful.

To meet this goal, your team will create internal processes and training procedures for support teams, so they can meet the demands of the Plant Pals service. These processes will help mitigate potential revenue losses due to late shipments and cancellations by ensuring an efficient, high-quality customer experience. By ensuring that Plant Pals runs smoothly, the plan also supports the larger project goal of a 5% revenue increase for Office Green.

You estimate that it will take six months to fully implement all protocols, including setting up operational tools, putting delivery processes in place, and training employees. The Operations and Training plan should stay within a budget of \$75,000.

Some of the milestones your team must reach to complete this project include:

- Create a plant delivery and logistics plan to make the fulfillment process as efficient as possible. Your target is to deliver 95% of orders on time within one month of launch. Tasks include purchasing delivery trucks, hiring drivers, and calculating delivery fees.
- Set up order processing and supply chain management software to make revenue streams more efficient. Your team must select, install, and maintain the software to ensure it continues to function properly. If it does, all orders should be packaged and ready for shipment within two business days of being placed.
- Maintain excellent service standards by developing and launching an employee training program. You want to train 90% of employees before the official service launch. To reach this milestone, your team needs to create a communications plan, prepare training lessons, and schedule and conduct training sessions.

Your first step is to create a charter to align your stakeholders and map out what your team needs to know to create and implement the plan.



Office Green

Project Plant Pals Operations & Training Plan March 1st

Document Status: **Draft** | In Review | Approved

Executive Summary:

Our plan is to create internal processes and training procedures for support teams, to meet the demands of the new Plant Pals service and ensure an efficient, high-quality customer experience

Project Goal

SMART: *Specific, Measurable, Attainable, Relevant, and Time-bound*

- To create efficient internal processes and training procedures for support teams within 6 months which ensures a 5% revenue increase for Office Green by the end of the year

Deliverables

1. Establish a plant delivery and logistics plan to deliver 95% of orders on time within one month of launch.
2. Select and install supply chain software and equipment to ensure that all orders should be packaged and ready for shipment within two business days of being placed.
3. Develop and launch an employee training program for 90% of employees before the official service launch.

Business Case / Background

Why are we doing this?

- Efficient internal processes and training procedures for support teams will help meet the demands (On Time in Full) of the new Plant Pals service, while ensuring a high-quality customer experience.

Benefits, Costs, and Budget

Benefits:

- Support new service leading to 5% revenue increase,
- Reduce late shipments and cancellations and other related costs,
- Increase customer satisfaction, ensure high-quality customer experience and improved customer valuation.

Costs:

- Price of packaging materials, inventory management and fulfillment software, fulfillment equipment, vendor installation fees, time spent on hiring and training

Budget needed:

- \$75,000

Scope and Exclusion

In-Scope:

- Customer service standards, delivery processes, training protocols, internal safety protocols for the equipment
- Sourcing packaging materials
- Hiring delivery drivers
- Supervising vendor setup of inventory management and fulfillment software
- Supervising vendor installation of the fulfillment equipment
- Development of training sessions
- Training employees

Out-of-Scope:

- Product development, vendor contracts
- Purchasing delivery trucks

Project Team

Project Sponsor: Director of Operations

Project Lead: Project Manager (*Kateryna Dashevskya*)

Project Team: Fulfillment Director, Quality Assurance Tester, Inventory Manager, Financial Analyst, Human Resources Specialist, Training Manager

Additional Stakeholders: VP of Customer Success, Account Manager, Receptionist, Sales Director, Sales Team, Marketing Director, Investors

Measuring Success

What is acceptable:

1. 5% revenue increase by the end of the year.
2. 90% of employees trained before the official service launch.
3. 95% of orders delivered on time within one month of launch.
4. All orders packaged and ready for shipment within two business days of being placed.