

Project Charter

CONTOSO, LTD MICROSOFT DYNAMICS CRM IMPLEMENTATION FOR CALL CENTER

Prepared for
Contoso, Ltd

Prepared by
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1 INTRODUCTION

Contoso, Ltd is among the largest providers of private post-secondary education in Brazil, based on student enrollment and revenue, with 83 locations. Headquartered in Rio de Janeiro, Contoso, Ltd employs approximately 21,000 full-time, part-time and adjunct faculty and staff and Fall 2007 enrollment of 116,000 students.

Contoso, Ltd's education institutions offer a broad range of academic programs concentrated in the creative and applied arts, behavioral sciences, education, health sciences and business fields, culminating in the award of associate's through doctoral degrees as well as non-degree programs. Contoso, Ltd faculty are skilled instructors and trained professionals in their fields. Many faculty have extensive industry experience as well as the necessary academic qualifications.

2 PROJECT SCOPE

BUSINESS OBJECTIVES

1. Increase Admissions staff productivity and drive consistency of Admissions staff performance.
2. Provide effective communications with the student through the student life cycle
3. Increase the weekly completed applications by 16% per ADA
4. Improve the application to start rate by 45%
5. Improve employee satisfaction by decreasing ramp up time by providing an intuitive easy to use system
6. Improve the predictability and consistency of key business metrics
7. Improve data access for real-time access to management and monitoring

PROJECT OBJECTIVES

Release 1

1. Establish Microsoft Dynamics CRM as the system of record for Contoso, Ltd lead information
2. Design and implement a solution for the Contoso, Ltd Lead to Application new and re-entry student processes using an integrated solution
3. Design and implement a solution for the Contoso, Ltd Application to Enrollment new processes using an integrated solution
4. Integrate the solution with the existing Leads and Siebel applications
5. Test and deploy the integrated solution to the Contoso, Ltd user base

Release 2

1. Design and implement a solution for the Lead to Application new and re-entry student processes using an integrated solution
2. Integrate the solution with the existing Leads and Siebel applications
3. Test and deploy the integrated solution to the user base
4. Design and implement dashboard reporting for the entire user base

RELEASE 1 SCOPE

1. Microsoft Dynamics CRM Modules
 - Microsoft Dynamics CRM Sales
 - Microsoft Dynamics CRM Marketing
2. Business Processes
 - a. Lead to Application Student processes
 - b. Application to Enrollment Student processes
 - c. New and Re Entry Student processes
3. Microsoft Dynamics CRM Entities

- a. Account
 - b. Contact
 - c. Activity
 - d. Opportunity
 - e. Campaign
4. Integration
- a. Microsoft Dynamics CRM ↔ Siebel (Student Information System) interface for unidirectional or bidirectional (if necessary) for the dynamic synchronization of Contacts and Opportunities
 - b. Leads → Microsoft Dynamics CRM interface for unidirectional synchronization of Contacts and Opportunities
5. Other Integration Components (primary responsibility of Contoso, Ltd)
- a. Online Application → Microsoft Dynamics CRM for student account information
 - b. Campus Portal → Microsoft Dynamics CRM for student account information
 - c. Microsoft Dynamics CRM → Responsys for outbound email campaigns
6. Training
- a. Assist with the development of training materials for Train the Trainer
 - b. Provide train the trainer training
7. Knowledge Transfer
- a. Functional
 - b. Microsoft Dynamics CRM Administration
 - c. Microsoft Dynamics CRM Installation
 - d. Systems Architecture
 - e. Configurations and Customizations
 - f. Reports
8. Reporting
- a. Perform training for users to create ad hoc reports on data in Microsoft Dynamics CRM
 - b. Develop up to 10 custom reports using standard reports included in Microsoft Dynamics- Microsoft Dynamics CRM 4.0 as templates.
9. Deployment
- a. Configure, stabilize (test) and deploy the solution to the Contoso, Ltd (Release 1) , AUO and SUO (Release 2) for 1,201 users distributed among the communities as follows:

Contoso, Ltd	600
Others	601
Total	1,201
 - b. Locations – Rio de Janeiro, Buenos Aires
 - c. Mode – Microsoft Dynamics CRM 4.0 Web Client

PROJECT DEPENDENCIES

Migration of Contoso, Ltd student information system to Siebel is in progress and expected to be completed by the end of May 2008. Contoso, Ltd will be responsible for ensuring cross project communications take place to ensure there are no schedule impacts.

OUT OF SCOPE

1. Student Alumni processes are out of scope for both releases of the project

2. Future state business process definition or re-engineering beyond the processes impacted by the Microsoft Dynamics CRM solution for Release 1 and 2
3. Microsoft Dynamics CRM Workflows or multiple sales processes and/or methodologies (except for Lead to Enrollment)
4. Modifications to the core Microsoft Dynamics CRM SDK or coding/scripting on third party applications
5. Integration or interface to any third-party or legacy systems the systems identified in the scope section
6. Preparation/formatting, data cleansing, de-duplication and export of legacy data for the migration to Proseware, Inc. provided template
7. Validation of migrated data
8. Hardware and software procurement and installation
9. Remote connectivity infrastructure (Except for CITRIX and Desktop)
10. End-user training beyond train the trainer
11. Creation of end-user training collateral. Proseware, Inc. will provide a template to Contoso, Ltd who will be responsible for customizing it for their needs.
12. Organizational Change Management
13. Support documentation, as this comes with the Proseware, Inc. Microsoft Dynamics CRM 4.0 Software
14. Creating Mail merge word documents or email templates
15. Desktop, OS upgrades or service pack maintenance to meet minimum product operating requirements
16. Deployment of the solution to mobile users

3 PROJECT GOVERNANCE MODEL

KEY STAKEHOLDERS

Group	Name	Title
Executive Steering Committee		
	Hadaya, Sagiv	President
	Abolrous, Hazem	VP Operations
	Iallo, Lucio	VP Education
	Jacob, Sanjay	CIO
	Bator, Tomasz	Proseware, Inc. Practice Manager
	Rasmussen, Morten	Proseware, Inc. Engagement Manager
	Kerle, Michael	Proseware, Inc. Sr. Project Manager
Executive Sponsors		
	Cabatana, Reina	President
	Lachance, Joel	VP Operations
	Makovec, Tina	CIO
Stakeholders		
	Eamsiri, Krittiya	VP, Student Applications
	Hamilton, James R.	CIO

	Harel, Eran	Director, Technology
	Hao, Junmin	VP
	Hanson, Mark	VP
	Oğuz, Göktuğ	AVP, Systems Integration
	Grauner, Torleif	Proseware, Inc. Engagement Manager
	Xie, Ming-Yang	Proseware, Inc. Practice Manager and Proseware, Inc.'s Project Sponsor Ownership and Accountability
	Yang, Chen	Proseware, Inc. Account Manager
	Dan Richards	Proseware, Inc. Public Sector Sales Director

Ownership and Accountability Matrix

PROSEWARE, INC. ROLES AND RESPONSIBILITIES

Role	Responsibilities
Project Manager	The Project Manager is responsible for ensuring that all aspects of the project are planned and executed in a manner that will lead to meeting the implementation goals within the established timeframe and budget to a high degree of customer satisfaction
Engagement Manager	During the implementation, the Engagement Manager has overall responsibility for ensuring quality and timeliness in the delivery of services and maintaining a healthy relationship with the customer.
Solution Architect	The Solution Architect is the primary resource for determining the approach to be utilized in an implementation. The Solution Architect will also assist in scoping and documenting customizations the project may require. The Solution Architect should possess a thorough understanding of the product from both a functional and technical perspective.

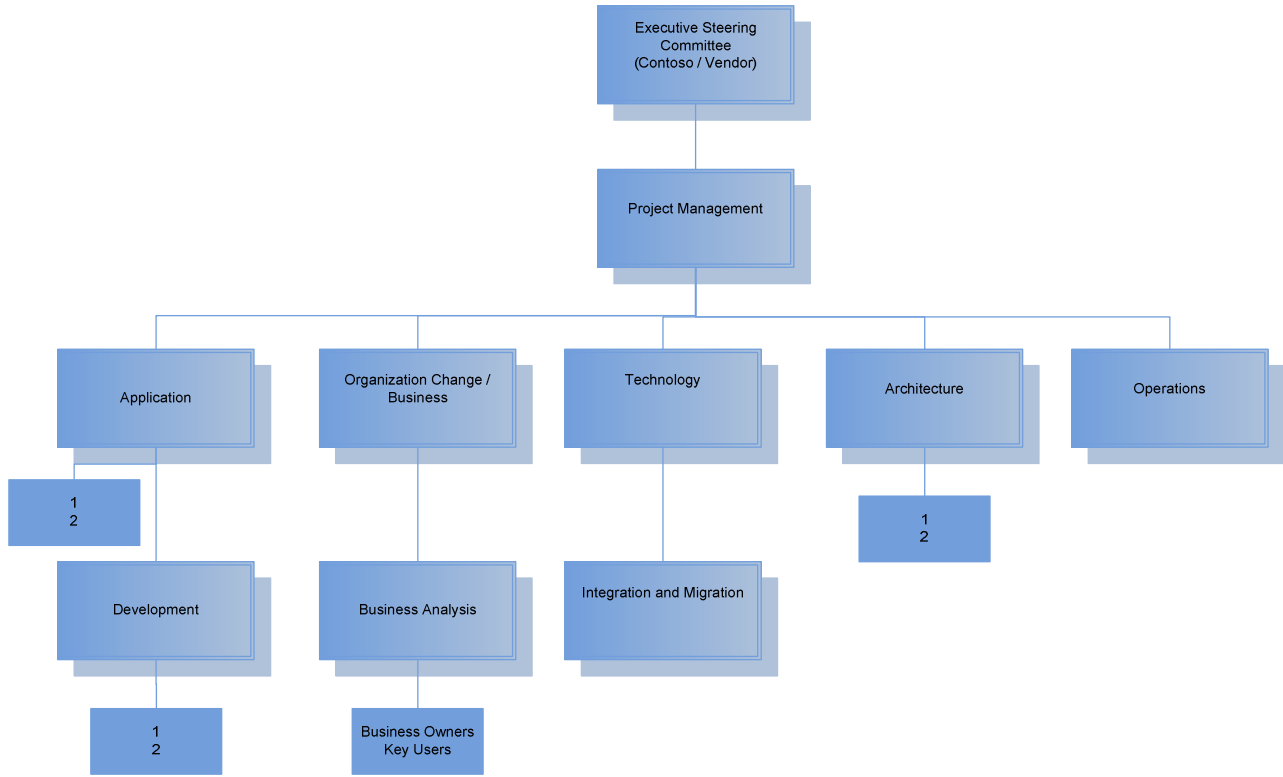
Application Consultant	The Application/Functional Consultant will participate in every aspect of the implementation from analyzing the customer's business requirements to configuring the Proseware, Inc. Microsoft Dynamics application to meet the customer's needs. The Application/Functional Consultant communicates with the customer's organization on many levels to obtain the necessary understanding of the business processes.
Development Consultant	The Development Consultant is responsible for the design and development of modifications to the standard Proseware, Inc. Microsoft Dynamics application.
Technology Consultant	The Technology Consultant is tasked with solving issues that relate to implementing Proseware, Inc. Microsoft Dynamics and related software in the customer's current IT environment.

CONTOSO, LTD ROLES AND RESPONSIBILITIES

Role	Responsibilities
Executive Sponsor	The Customer Executive Sponsor is a senior level executive who has accepted ownership of investigating and investing in a business system initiative and will promote funding and staffing of the project.
Business Decision Maker	Business Decision Makers are management level individuals within the customer's organization responsible for a specific aspect of the organizational process that will be impacted by the implementation.
Customer Project Manager	The Customer Project Manager is responsible for ensuring all customer requirements are planned and executed in a manner that will meet the implementation goals for the project.
IT Manager	The IT Manager is responsible for the customer's entire IT environment including both hardware and software setup in all locations, or the person filling this role may be accountable for assembling the resources who can be responsible for these technologies.

<p>Organizational Change Manager</p>	<p>The Organization Change Manager is responsible for ensuring that the change introduced by the new Microsoft Dynamics CRM system is introduced and communicated to the stakeholders and users. These activities including mobilizing the leadership, managing communications and ensuring that training is planned and executed.</p>
<p>QA Manager</p>	<p>The QA Manager is responsible for managing and coordinating the Systems and Integration Test, Performance Test and User Acceptance Test activities. These activities include ensuring the availability of test users, test resources and scheduling the test activities.</p>
<p>Key Users</p>	<p>Key Users (or Subject Matter Experts) represent a functional area or department within the customer organization, for example, marketing or inside sales. They are typically a more experienced user who has in-depth knowledge of the business processes and procedures currently being used in their functional area or department.</p>
<p>End Users</p>	<p>End Users are the individuals from various functional areas or departments who will use the new solution to perform their daily activities.</p>

PROJECT TEAM STRUCTURE



Role	Name	Organization
Project Manager(s)	Numadutir, Inga	Proseware, Inc.
	Øby, Sidsel	Contoso, Ltd
Engagement Manager	Gornozhenko, Dmitry	Proseware, Inc.
Solution Architect(s)	Noriega, Fabricio	Proseware, Inc.
	Xylaras, Ioannis	Contoso, Ltd
Application Consultant(s)	Miller, Ben	Proseware, Inc.
	Fitzmaurice, Mike	
	Frank, Jill	

Development Consultant(s)	Valverde, Eva Li, Yan Czernek, Pawel	Proseware, Inc.
Technical Support Account Manager	TBD	Proseware, Inc.
Services Executive	Stammler, Jeff	Proseware, Inc.
Organization Change Manager and Business Process Manager	Lang, Eric	Contoso, Ltd
Business Process Analysis Manager	Clark, Molly	Contoso, Ltd
QA Manager	Barbariol, Angela	Contoso, Ltd
CRM Administrator	Ræbild, Jesper	Contoso, Ltd
Infrastructure and Operations Manager	Ptak-Małyśiak, Urszula	Contoso, Ltd
Integration and Interface Manager	Hughes, Christine	Contoso, Ltd
Key Users / Business Owners		Contoso, Ltd

REPORTING

1. Proseware, Inc. team status reports from the Functional Lead and Technical Lead are due to the Proseware, Inc. Project Manager by Thursday every week at 9:00am EST
2. Proseware, Inc. Project Status Report from Proseware, Inc. Project Manager due to Contoso, Ltd Project Manager by Thursday every week at 4:00pm EST
3. Steering Committee Report from the Proseware, Inc. and Contoso, Ltd Project Managers due every Friday at 10:00am EST

COMMUNICATIONS

1. Proseware, Inc. team internal status meeting will occur every Friday at 8:00am EST
2. Proseware, Inc. and Contoso, Ltd project status meeting will occur every Thursday at 03:00pm EST. Meeting attendees will include all team leads and project leads.
3. Proseware, Inc. and Contoso, Ltd Steering Committee update will occur every Thursday at 01:00pm EST
4. Phase Tollgate review meetings will be scheduled at the end of every phase completion
5. Change control board meetings will be scheduled on a weekly basis upon completion of the Design phase

4 PROJECT APPROACH

Proseware, Inc. will leverage the Sure Step Methodology to execute this implementation. Sure Step provides a structured approach to implementing Proseware, Inc. Microsoft Dynamics products. The Sure Step Methodology provides detailed guidance on roles required to perform activities and proven best practices. Flowchart diagrams within this implementation methodology point to tools and templates that can be used at different phases of an implementation project.

Sure Step Methodology organizes the approach into five distinct phases during the implementation project lifecycle



CONSTRAINTS AND ASSUMPTIONS

None identified

ISSUES AND RISKS

None identified

HIGH-LEVEL SCHEDULE

RELEASE ROADMAP

	Sales	Marketing	Service
Contoso, Ltd	Release 1		Release Future
Contoso, Ltd 2	Adm. V2	CM V2	
Contoso, Ltd 3	Release 2	Release 3	

RELEASE 1 SCHEDULE

EDMC Release 1	24-Mar	31-Mar	7-Apr	14-Apr	21-Apr	28-Apr	5-May	12-May	19-May	26-May	2-Jun	9-Jun	16-Jun	23-Jun	30-Jun	7-Jul
Analysis	Planning	Requirements	Gap / Fit													
Design				Functional		Technical										
Development					Configs, Customizations, Interfaces						Training Guides					
Deployment										Systems Test		UAT				
Operation																Support

KEY MILESTONES AND DELIVERABLES

R – Responsible, A – Accountable, I – Informed, C – Consulted

All dates are draft and to be finalized based on the project plan.

Functional Area	Deliverable/ Milestone	Date	Proseware, Inc.	Contoso, Ltd
Analysis	Phase Tollgate Review	04/30/2008		
	Project Charter	3/26/2008 - 4/1/2008	R, A, C, I	R, A, C, I

	Project Plan	4/1/2008 - 4/7/2008	R, A, C, I	R, A, C, I
	Business Requirements	3/31/2008 - 4/11/2008	R	A, C, I
	Solution Architecture	3/31/2008 - 4/11/2008	R, A	C, I
	Gap Fit Analysis	4/7/2008 - 4/18/2008	R, A	C, I
	Dev / Sandbox Environments	4/18/2008	R, A	C, I
Design	Phase Tollgate Review	5/30/2008		
	Functional Design	4/21/2008 - 5/2/2008	R, A	C, I
	Technical Design	5/2/2008 - 5/16/2008	R, A	C, I
	Training / Test Environments	5/23/2008	R	A, C, I
	Test Plan	5/30/2008	R	A, C, I
	System Test Scripts	5/30/2008	R, A	C, I
	Training Plan	5/30/2008	R	A, C, I
Development	Phase Tollgate Review	6/30/2008		
	Configuration and Development	4/28/2008 - 5/23/2008	R, A	C, I
	Systems and Integration Test	5/26/2008 - 6/13/2008	R	A, C, I
	Performance Test	6/2/2008 - 6/13/2008	R	A, C, I
	Production Environment	6/6/2008	C, I	R, A
	Training Documentation	6/12/2008	R	A, C, I
Deployment	Phase Tollgate Review	7/11/2008		
	Deployment Plan	6/9/2008	R	A, C, I
	Train the Trainer	6/9/2008 – 6/12/2008	R, A	C, I
	User Acceptance Test	6/16/2008 - 6/27/2008	C, I	R, A
	Go / No Go Decision	6/27/2008	C, I	R, A
	Go Live	6/30/2008	C, I	R, A

Operation	Phase Tollgate Review	7/25/2008		
	End User Training	7/1/2008 – 7/11/2008	C, I	R, A
	Transition to Support	7/1/2008 – 7/11/2008	R, A	C, I

Key Milestones and Deliverables

5 SUCCESS CRITERIA AND METRICS

BENEFITS

- Increase productivity of Admissions Support by standardizing and automating staff's daily activities:
 - Increase talk times of Admissions on a weekly basis.
 - Reduce the "paperwork" and low-value add activities
 - Increase the average completed applications per week
 - Increase sub-processes rates (i.e. lead-to-contact, lead-to-application, lead-to-interview and lead-to-start rates)
- Improve Admissions support staff job satisfaction and morale by reducing the amount of human middleware :
 - Reduce "paperwork" and lower value-add activities
- Improve campaign management ROI on all types of leads (including re-entry students)
- Improve visibility into and drive consistency of Admissions performance