



Project Charter

Madison Area Technical College
Technology Services

Project Charter

For the

MATC Customer Relations Management Initiative

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Prepared By: Peri Mills and Regina Mosher

Project Scope

Implement College Net CRM solution to replace existing EMAS system. Identify requirements for prospective student and student communications, including identification of data elements within PeopleSoft SA needed in the CRM application.

Determine best solution from within our application portfolio for prospective student/student communications. Develop charter and implementation plan for prospective student/student communications based on chosen solution.

Project Objectives

Phase 1

Prospect Identification and Communication

- Identify information sources and elements - Request cards, event registration forms
- Capture data elements
- Identify and develop data inquiries
- Generate statistical reports
- Generate communications to a select/discrete population based on data driven criteria.
- Capture and track communication responses

Phase 2

Contact Management Enhancements & Communications-Prospects, Pre-Enrollment and Student Retention Communications

- Develop Contact Management Prospective Student Entry Form
- Gather Requirements and Research Solutions to Grow Communications - Prospects, Pre-enrollment, Student Retention
- Identify and Develop Communication Solution
- Generate statistical reports
- Generate communications to a select/discrete population based on data driven criteria.
- Capture and track communication responses

Phase 3

Donors and Alumni Relations

- Collaborate with Stakeholders to build one MATC donor and alumni communications solution
- Gather Requirements and Research Solutions
- Identify and Develop Communication Solution
- Generate statistical reports
- Generate communications to a select/discrete population based on data driven criteria.
- Capture and track communication responses

Milestones and Deliverables

Dates	Project Task	Deliverable	Resources
Phase 1 – Contact Management “As Is Delivered” Implementation			
3/5-4/29	<ul style="list-style-type: none"> ▪ Deliver Production “As Is” Contact Management System 	<ul style="list-style-type: none"> ▪ Prospects Entry System ▪ Communications Functionality 	CN-James Carter
5/7 3 Hours	<ul style="list-style-type: none"> ▪ Training ▪ Implement Production Contact Management System 	<ul style="list-style-type: none"> ▪ Training Material ▪ Business Process Documentation 	CN-James Carter M-Marjorie Cook -Stephanie Dean -Wendy Sauve -Paula Symons -Peri Mills -Diane Wallesar
5/8-7/8 2 Months	<ul style="list-style-type: none"> ▪ Identify System Enhancements ▪ Identify Roles 	<ul style="list-style-type: none"> ▪ Test Plan ▪ Security Documentation 	CN-James Carter M-Marjorie Cook -Stephanie Dean -Wendy Sauve -Paula Symons -Peri Mills -Diane Wallesar
7/8-7/21 2 Weeks	<ul style="list-style-type: none"> ▪ Complete Contact Management System Enhancements ▪ Model Security 		CN-James Carter M-Peri Mills
7/22-8/1 2 Weeks	<ul style="list-style-type: none"> ▪ Test Contact Management System Enhancements 	<ul style="list-style-type: none"> ▪ Enhancements - Business Process Documentation 	CN-James Carter M-Marjorie Cook -Stephanie Dean -Wendy Sauve -Paula Symons -Peri Mills -Diane Wallesar
8/4	<ul style="list-style-type: none"> ▪ Implement Enhanced Contact Management System 		CN-James Carter M-Marjorie Cook -Stephanie Dean -Wendy Sauve -Paula Symons

Dates	Project Task	Deliverable	Resources
			-Peri Mills -Diane Wallesar
Phase 2 – Contact Management Enhancements & Grow Communications-Prospects, Pre-Enrollment and Student Retention Communications			
5/1 - 5/15	<ul style="list-style-type: none"> ▪ Gather Communications Objectives / Requirements ▪ Map Current Communications 	<ul style="list-style-type: none"> ▪ Business Objectives / Requirements 	M-Stephanie Dean -Jennifer Hoege -Lori McRoberts -Peri Mills -Diane Wallesar
5/15 – 5/31	<ul style="list-style-type: none"> ▪ Research and Document Communications Solution Options ▪ Explore CollegeNet Import/Export Functionality 	<ul style="list-style-type: none"> ▪ Decision Matrix 	
5/31	<ul style="list-style-type: none"> ▪ Identify Communications Solutions 		
	<ul style="list-style-type: none"> ▪ Draft Communications Project Charter 	<ul style="list-style-type: none"> ▪ Project Charter-Grow Communications 	
	<ul style="list-style-type: none"> ▪ Draft Contact Management Prospective Student Entry Form 		
	<ul style="list-style-type: none"> ▪ Identify interface requirements between CollegeNet Online Application, PeopleSoft and Communication Solution 		
	<ul style="list-style-type: none"> ▪ Build interface 		
Phase 3 – Donor and Alumni Relations			
	<ul style="list-style-type: none"> ▪ Gather Donor and Alumni Objectives / Requirements 	<ul style="list-style-type: none"> ▪ Business Objectives / Requirements 	
	<ul style="list-style-type: none"> ▪ Research and Document Donor and Alumni Systems Solutions 	<ul style="list-style-type: none"> ▪ Decision Matrix 	
	<ul style="list-style-type: none"> ▪ Identify Donor and Alumni Solution 		
	<ul style="list-style-type: none"> ▪ Draft Donor and Alumni Project Charter 	<ul style="list-style-type: none"> ▪ Project Charter-Donor and Alumni System 	

Constraints - note Current EMAS data capture and need to migrate existing data? EMAS license contract is up.

Constraints- Any external, management, or other factor that restricts a business or system development in terms of resource availability, dependencies, timescales, or some other factor.

- Communications methods (email, web, chat, blog, mail, phone) must be identified, defined and in-place for communication success.

Risks

- Bounced emails, 30-40%, will impact project success. NOTE - email bounced percentage was identified with the CollegeNet application system.

Project Team and Roles

Role	Project Responsibility	Recommended Staffing
Project Sponsor	<ul style="list-style-type: none"> • Establish project vision and direction • Serve as project champion • Promote project objectives to campus community • Provide a strategic business perspective and an understanding of the overall project scope and overlapping priorities • Adjust priorities relevant to the priorities of the overall organization • Monitors project progress • Creatively balance competing interests and agendas • Decision maker and issue/problem resolution • Evaluate Scope decisions to determine if new functionality can be included in the project or needs to remain out of scope • Approve alternative business processes 	
Enterprise Development Management	<ul style="list-style-type: none"> • Communicates directly with Executive Sponsors and Business Community 	<ul style="list-style-type: none"> •
Director, Infrastructure Services	<ul style="list-style-type: none"> • Responsible for the integration and implementation plan • Supervisory management of the Technical Support staff 	<ul style="list-style-type: none"> •
Project Manager	<ul style="list-style-type: none"> • Identifies and Assigns tasks to project team • Communicates project status following communication plan • Maintains project documentation including project charter, charter change requests and timeline • Collaborates with vendors on tasks, responsibilities and timeline 	<ul style="list-style-type: none"> •
Technical Lead	<ul style="list-style-type: none"> • Identifies technical requirements • Manages technical team tasks and responsibilities • Prepares technical documentation • Provides technical decision making necessary to provide required technical solutions • Acts as technical liaison with vendors • Reviews, tests and approves vendor technical solutions, documentation and testing 	<ul style="list-style-type: none"> •

Role	Project Responsibility	Recommended Staffing
Functional Lead	<ul style="list-style-type: none"> • Moves policy decisions through approval process • Provides functional decision making necessary to analyze and change business process within their specific area of responsibility • Implements business process changes • Creates and maintains alternate business process documentation • Serves as a member of the project team • Works closely with project manager, technical leads and vendor during all phases of implementation • Identifies functional experts who will participate in various project activities • Creates and maintains business training documentation • Responsible for creation and maintenance of accurate test scripts through hands on involvement or assignment of the script maintenance responsibility to a functional expert. 	

Project Customers

- Marketing department
- Projective student relations
- Prospective students
- Learning centers-jump starts, directors
- Enrollment Center including Financial Aid
- Student Development Center including Advising, counseling, disability resource services
- Regional Campuses
- High Schools counselors – more from a reporting perspective

Project Stakeholders

Project Team Members

- Diane Walleser
- Teresa Werhane
- Paula Symons
- Marjorie Cook
- Stephanie Dean
- Peri Mills

- Wendy Sauve

Communication Plan

Group	Frequency	Forum	Responsible Party	Key Messages	Documentation

Project Charter Approval Form

Project Name: **MATC Customer Relations Management Project**

The purpose of this document is to provide a vehicle for documenting the completion of the project initiation stage. It is used to reach a satisfactory level of mutual agreement among the project sponsor, the project owner, and the project manager on the high level objectives and scope of the project before significant resources are committed and expenses incurred.

I have reviewed the information contained in the Project Charter dated: Date and agree this project should continue to the next funding checkpoint, as defined in that document.

Project Sponsor: Name, Title

Date