**Project Name:** Mississippi College GoldMine Training

**Project Manager:** Robert Gatewood, Database Administrator

**Project Sponsor:** Mark Hughes, Dean of Enrollment Services

**Project Owner:** Dr. Jim Turcotte, Vice President of Enrollment Services and
 Dean of Students

**Version Date:** 10/17/2012

**Purpose:**

The Mississippi College Office of Enrollment Services has adopted FrontRange’s GoldMine application as its Customer Relations Management (CRM) tool. The purpose of GoldMine is to ensure better communication with perspective students and students who have applied to the university. By adopting GoldMine as the university’s CRM, admissions counselors will be able to better communicate with their perspective and applied students. GoldMine will also manage the office’s communication flow plan that dictates when a student receives an automated letter, email, postcard, or phone call. The admissions counselors will use the CRM to know when to place a phone call to a student and be able to record that phone call. GoldMine will also keep track of all information that a student has turned in thus far and information that needs to be turned in for a student’s file to be complete for admissions. GoldMine training is needed because the admissions staff has not been using the system to its fullest. The team was never properly trained after GoldMine was bought, so the staff does not know how to use the software effectively and only knows how to use limited functions of the software.

**Business Objectives:**

* Deploy GoldMine to users’ computers.
* Implement GoldMine as the Office of Enrollment Services’ CRM.
* Properly train all necessary employees on how to use GoldMine effectively.

**Deliverables:**

* GoldMine Application
* Better communication with prospective and applied students.
* Better communication with parents of prospective students, since they are the ones that will most likely be paying the bill.

**In Scope:**

This project will include effectively training all necessary Enrollment Services employees on the proper use of GoldMine. The application will be available to them on their desktop computers in the office as well as on the web so that they can access information from off-campus. All features of GoldMine will be implemented within the first six months of its adoption at Mississippi College. All employees will be properly trained within the first year of Mississippi College adopting GoldMine as its CRM. All training will be conducted by the Database Administrator (DBA); no outside vendors will be involved in the training process unless an emergency arises.

**Out of Scope:**

This project will not include building a data bridge to the university’s student database, Banner. This project also does not include training or implementing GoldMine in any other office except for the Office of Enrollment Services.

**Project Success:**

This project will only be considered a success when the following has been met:

* The GoldMine server on-campus has been set up.
* The GoldMine application has been deployed to all necessary employees’ desktop computers.
* All features of GoldMine have been implemented within the first six months.
* All Enrollment Services employees have been properly trained within the first year.
* Mississippi College executives have signed-off that the implementation and training of GoldMine have been completed.
* Admissions staff has successfully begun using the GoldMine system to its full functionality.

**Project Milestones:**

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| **Critical Milestone** | **Target Date** | **Accountability** |
| Implementation Plan | 11/1/12 | Mark Hughes |
| Training Plan | 12/1/12 | Robert Gatewood |
| Communication Flow Plan | 1/15/13 | Mark Hughes |
| Implementation Completion | 5/1/13 | Robert Gatewood |
| Training Completion | 12/1/13 | Jim Turcotte |

**Major Known Risks:**

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| **Risk**  | **High** | **Medium** | **Low** |
| GoldMine Server Crashes | Computers sometimes crash and if the GoldMine server were to crash we would have to implement a new server and could extend the project time line. |  |  |
| Loss of team member |  |  | The loss of a team member could require the extension of project time. |
| Need for an outside consultant |  | If the DBA runs into any problems that require an outside consultant to be hired. |  |
| Motivation of Staff |  |  | The staff will need to be motivated and convinced that this is the way the office needs to run. |
| Over/Under Budget | It will be a major issue with the CFO if we go over budget. |  | It will not be a problem if we go under budget. |

**Assumptions:**

* All employees will have a desktop PC in their office that is able to run GoldMine.
* Mississippi College has space on their Virtual servers for the GoldMine server.
* All employees will be willing to learn new processes that GoldMine will impose.
* The GoldMine system will work properly on the campus of Mississippi College.

**Constraints:**

* GoldMine is only able to be installed and work on a Windows based computer, it will not run on an Apple because of SQL Server.
* Some employees have done certain process for the same way for thirty years and may be unreceptive to change and using a new technology.
* It is assumed that Mississippi College has all the necessary equipment and will assist with any needed equipment.
* System failures/downtime.
* Bugs in the system.
* Intended budget is off.

**External Dependencies:**

There are very few external dependencies in this project because all of the training and implementation will be done in-house. The product should be delivered from FrontRange (GoldMine manufacturer) without any problem because they supply people with this software all the time without any problem. If GoldMine needs to be accessed off campus, we will have rely on the internet connection of the outside source.

**Summary Budget:**

This section provides a summary of estimated spending to meet the objectives of the Mississippi College GoldMine training project as described in this project charter. This summary of spending is preliminary and should reflect costs for the entire investment lifecycle. The money will for this project will come from an account designated by the CFO of Mississippi College that is budgeted for special purchases. There is little money to be spent on this project aside from the cost of the software because Mississippi College already has the server that is necessary for GoldMine to be hosted on, users already have their desktop computers, and there is no need to hire a trainer because the DBA will facilitate all of the training. There is a line item for unexpected expenses just in case of an emergency.

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| Budget Item | Total Estimated Cost | Description |
| FrontRange GoldMine Application for 35 users | $75,000.00 | This cost will cover the cost of the GoldMine Application for 25 users. |
| GoldMine Web Application for 10 users | $5,000.00 | This cost will cover the cost of the GoldMine Web interface. |
| GoldMine Training of Trainers | $8,000.00 | Train the trainers that will train the staff at Mississippi College. |
| Unexpected Expenditures | $5,000.00 | This cost is for unexpected expenditures that might arise during the project. |
| **Total** | $93,000.00 | Total cost of the project. |

**Types of Vendor Assistance:**

Mississippi College does not plan to inquire the help of any outside vendors because the DBA that will be performing the implementation and training has done this at other schools before and should not require any assistance. However, you cannot plan for everything so a line item was added to the budget to account for an emergency should the university need to hire an outside consultant. Mississippi College will hire GoldMine to train the trainers that will be working for Mississippi College and training the admissions staff.

**Roles and Responsibilities**

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| **Role** | **Participant Names** | **Responsibilities** | **Forecast Time Investment (in days)** |
| Project Manager | Robert Gatewood | The role of Project Manager is to ensure that all deadlines are met and that the team is able to work together and on-task. The PM is responsible for seeing the project is complete and develops the project plan. | 365 days |
| Project Sponsor | Mark Hughes | The role of Project Sponsor is to secure funding and resources for the project. The Project sponsor should keep abreast of the project activity and is the decision-maker for the project. | 365 days |
| Project Owner | Dr. Jim Turcotte | The role of the Project Owner is to essentially oversee the project. They are able to promote, demote, etc. team members. The project owner oversees the project mission and direction. The Project Owner has access to all project functions and administration. | 365 days |

**Sign-off:**

**Approvals:**

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| **Role** | **Signature** | **Date** |
| Project Manager – Robert Gatewood |  |  |
| Project Sponsor –Mark Hughes |  |  |
| Project Owner – Dr. Jim Turcotte |  |  |

**Design Document**

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| **Learning Objectives** | **Key Points Content/Concept** | **Process and Activity** |
| The Enrollment Services employees will successfully identify all the new features that the GoldMine software has to offer. This includes all the various screens and tabs. This will be conducted on their desktop computers. | * Learning the layout of GoldMine
* Learning what information is displayed on the main contact screen
* Learning about the various tabs that provide information on the student
* Learning where items are located in the menus of GoldMine
* Learn how to create custom groups of students
 | This learning module will be mostly lecture and demonstration by the instructor. The employees will watch the instructor as he goes over the key points and then the employees will be given an opportunity to explore the software on their own. |
| The Enrollment Services employees will successfully create a new contact record in GoldMine by using their desktop computer. | * Entering the Name Correctly
* Formatting the address correctly
* Entering the Phone Number
* Entering the Email Address
* Entering the Student Type, Student Status, and Entry Term
* Entering the Student’s high school/prior college
* Entering the student’s church information
* Entering the student’s self-reported ACT/SAT score
 | This learning module will be completed through demonstration by the instructor and then the employees will have hands-on experience to enter their own contact record. There will be a short lecture period at the beginning to explain what certain codes mean and why certain fields must be formatted a certain way. |
| The Enrollment Services employees will successfully record a call in GoldMine by using their desktop computer. | * Recording a call in the student’s history record
* Choosing the type of call completed
* Determining if a call is successful/unsuccessful
 | This learning module will be demonstrated by the instructor and the employees will practice completing calls on their own. |
| The Enrollment Services employees will successfully use the email component of GoldMine on their desktop computer. | * Send a personal email to one student
* Send a generic email to a group of students
* Send a personalized email to a group of students through the use of merge fields
* Attach documents to emails
* Create email templates for regular use
 | This learning module will begin with the instructor demonstrating how to use the email functionality of GoldMine and then the employees will practice the key concepts of this learning module. |
| The Enrollment Services employees will successfully use the GoldMine Web application to do the same functions that the native desktop GoldMine can do. | * Learn how to create new contacts
* Learn how to complete a call for a student
* Learn how to create groups
* Learn how to email students
 | This learning module in a way is a recap of some of the prior learning modules but instead using GoldMine Web. There are small differences so this is an important learning module. |

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| **Criteria Test** | * There will be various criteria tests performed throughout each learning module. Often the employees will not know that they are taking a “test.” It will mostly be completing a task that the instructor has just taught. *eg. Completing a call, making a group, creating a new contact, sending an email, etc.*
* There will be nonperformance based criteria tests conducted throughout the training. These will just be little refreshers asked by the instructor periodically throughout the training session just to see if students are paying attention and retaining knowledge after a learning module has been completed.
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| **Review Test** | * The review tests will be administered after each learning module. These tests will be performed in a quiet training room without the help of the employee’s peers. They will have to complete all the tasks that were just learned in a learning module on their own. These tasks will be graded by the instructor after an employee has finished each review test. These tests will be performance based; there will be no nonperformance based review tests.
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| **Post-Course Follow-Up** | * The post-course follow-up will be conducted by the instructor periodically after the training course is completed. The instructor will check the work an employee has completed periodically after training to ensure they are performing each task learned correctly.
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| **Instructional Method** | **Examples** |
| Presentation methods used to deliver content to the learners | * Lecture
* Discussion
* Demonstration
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| Application methods used to give the learners an opportunity to practice, apply, and/or respond to the course content. | * Hands-on practice
* Simulation
* Peer review
* Feedback
* Situational analysis
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