

Program Information

Contract Number:

XXX

Customer Information

Sponsor: FN, LN

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Program Start Date: 4/1/19

Charter Prepared By: Warren E. Wyrostek

Planned Program End Date: 3/31/19

Date Charter Approved:

Revision History

Version	Author	Date	Changes
1.0	Warren E. Wyrostek	7/28/18	Initial Draft

Program Description

The focus of this program is to continue the launch of the Certification Initiative for PRODUCT XV1 and XV2- now focusing on PRODUCT XV3 as a baseline certification. For Services employees the certification focus will target Application Overview, features and functions, build/configuration, methodology and process, workflow, and prescriptive guidance to include troubleshooting and research. All components targeting the PRODUCT

XV3 release and its use and implementation. This will be an opportunity to enhance and grow this wide scale certification.

To be successful in this initiative we are assuming that the educational foundation has been laid including objective-based training has been developed, reviewed, mapped and delivered by role, product and/or solution. This includes Electronic Education Development, Methodology Development and Key items for Certification. All training will be provided using a Model for Delivery that ensures employees are trained and ready for PRODUCT XV3 deployments. All targeted employees will be initially certified by the end of FY19 Q4, according to role-based, training and certification roadmaps.

This PRODUCT XV3 Certification Initiative will be non-hierarchical, but single layer, with assessments generated for the various functional roles within the Company. The ORGANIZATION occupational units in the target population include 16 CONSULTANT roles (by domain), Technical Consultant, Technical Advisor, Conversion consultant, IA, ETM, Report Writing Professional, PMs, EPMs, Implementation Support Analysts and Upgrade Analysts, and 5+ roles from Medical and health Services.

The assessment types that will be used to evaluate employee competence include, knowledge-based online assessments, Simulations, Oral, Role-play, demonstration, teach-back, hands-on performance-based, research and troubleshooting assessments.

Business Goals and Objectives

The primary business goal for the PRODUCT XV3 Certification Initiative is to ensure that employees are competent to perform a customer implementation, upgrade, migration or conversion to PRODUCT XV3. Certification training will focus on ensuring that employees can effectively perform with, leverage, implement,

and support the features, functionality, methodology and processes of the PRODUCT XV3 Products and Solutions.

The chief driver behind this goal is improving the customer experience and satisfaction pre, during and post deployment of PRODUCT XV3 Products and Solutions. Customers look to Company employees as experts with the products and solutions and certification is an industry recognized method of validating the knowledge and skills of these employees. Certification provides customers with a sense that employees have engaged the new products and are competent.

Indirectly, certification, as a validation of knowledge and skills, is a way to shore up one's business contacts. It is an industry proven point that customers prefer to do business with certified professionals as opposed to non-certified professionals.

The PRODUCT XV3 Certification Initiative is a way the Company can provide customers with an assurance that Company employees are trained and tested, capable and competent.

Business Goal	Target Metric
Assessed to validate employee's knowledge and skills with PRODUCT XV3 Products and Solutions; Implementing PRODUCT XV3.	25% by 2/19/19
Prior to engaging with Customers on PRODUCT XV3 Service and Upgrade delivery, employees would be certified on managing, supporting, implementing, migrating to, converting to, performing an Upgrade to PRODUCT XV3.	100% by 3/31/19

Scope

The scope of the PRODUCT XV3 Certification Initiative includes the competency to perform an implementation, upgrade, migration, or conversion to PRODUCT XV3 including setup and support of platform and applications for those in the Services organization. It will be a role-based evaluation of employee's knowledge and skills regarding the features, functionality, workflow and key integration touch points of the PRODUCT XV3 release including the impacts of the release for Application, Technical, and Medical and health Services roles. It will be a role-based evaluation of an employee's knowledge and skill of PRODUCT XV3. It will leverage a mixed-assessment model for this certification endeavor including performance-based (including observational), and

cognitive. It will not include assessment on PRODUCT XV2. and earlier products and solutions, or the aptitude leading to an earlier PRODUCT XV role-based certification.

The scope of this brief initiative is part of a larger PRODUCT XV3 Certification Plan. The broad outline for this plan is the following:

Pilot Teams

- *Pilot Pod Team 1 Hands on Practice-Training July/August 2018*
- *Pilot Pod Teams 2-4 Hands on Practice-Training August-November 2018*

Non-pilot Teams

- 10/10/2018 – Pre-Certification / Wave 1 Validation of Process
- 11/19/2018 – Pre-Certification / Wave 2 Validation of Process
- 2/19/2019 - 25% trained and certified employees by role
- 3/01/2019 - 50% trained and certified employees by role
- 3/31/2019 - 100% trained and certified employees by role
- 4/1/19-6/30/19 – Continued Training and Certification for consultants and Imp Support by Secondary/Minor/Domain focus

The scope for this phase is the initial population identified by role for certification process validation by March 31st, 2018.

The definition of certification that we are operating from for this initiative is:

Certification is a method used by ORGANIZATON Services to assess the professional capability, competence and proficiency of our delivery teams to perform an assigned role to a level that garners customer confidence and satisfaction.

Every ORGANIZATON Services Certification Roadmap will require some kind of Performance-based Assessment.

The roles and Business units in scope are:

Identified ORGANIZATON Roles

- 16 CONSULTANT roles (by application initially)
- Technical Consultant
- Technical Advisor
- Conversion consultant
- IA
- ETM
- Report Writing Professional
- PM
- EPM
- Implementation Support Analysts and Upgrade Analysts

- 5+ roles from Medical and health Services

Business Units Involved

- ORGANIZATON
 - Services

Out-of-scope Items

- PRODUCT XV2 and Earlier Products and Solutions

Other Related Projects

- PRODUCT XV3 Release Readiness (Training development and delivery) will be leveraged as part of this
- Methodology Development for PRODUCT XV3

Summary

- 1. Approach:**
 - a. Modular**
 - b. By Role**
 - i. Technical Services**
 - ii. Application Services**
 - iii. Medical and health Services**
- 2. Flavor of Performance-based Testing**
 - a. Based on role’s Major/Primary focus**
 - b. Scope**
 - i. Technical Services**
 - ii. Application Services**
 - iii. Medical and health Services**
- 3. Post Certification Training to include:**
 - a. Based on role’s Minor/Secondary focus as defined by managers**
 - b. In Scope**
 - i. Technical Services**
 - ii. Application Services**
 - iii. Medical and health Services**

Program Schedule

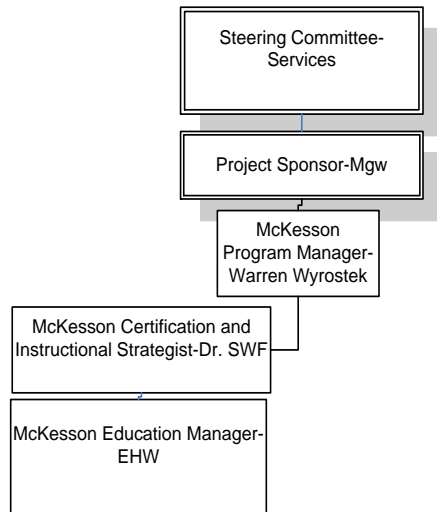
Milestone Description	Planned Completion Date
Phase 1 of Education Gold Std. DB build completed on PRODUCT XV2	7/19/18

Milestone Description	Planned Completion Date
Phase 2 of Education Gold Std. DB build begins on PRODUCT XV2.1 on Windows Server	7/30/18
Education Instructors Validate Current Build of Education Gold Std. DB on VIRTUAL ENV	Week of 8/17/18
Phase 3 of Education Gold Std. DB build begins on PRODUCT XV3.0 if early code available	8/26/18
Wave 1 Validation of Certification process: using Lab Consultant's: Validating Simulation process on current release, Train the Trainer and teach backs, M and P from Task Analysis, Troubleshooting/research all to be done software-agnostic; Validate the time required for a Wave.	9/30/18-10/10/18
Wave 2 Validation of Certification process: target either Imp Support or Tech services & possibly 1 CONSULTANT group: Validating the VIRTUAL ENVs set up and process for software stability; CONSULTANT for teach back; Validate the time required for a Wave.	10/30/18-11/13/18
Uplift VIRTUAL ENV to XV3 GA code and perform final system review.	12/19//18-12/22/18
Waves 3-XX Formal roll out of Performance based Certification for 25 roles plus Medical and health Services; Waves 1 and 2 to complete their remaining certification activities during this period on PRODUCT XV3	1/5/19-3/31/19
Build out DB for Education	3/31/19-6/30/19

Milestone Description	Planned Completion Date
Continued Training and Certification for Consultant's and Imp Support by Secondary/Minor/Domain focus	4/1/19-6/30/19

Program Organization

The following chart depicts the program organizational structure.



Risk Management

Every program carries with it a certain amount of risk. Risk management is the process of identifying those risks, then both implementing strategies to manage them and designing contingency plans to supplement those strategies should the risk begin to affect program success. The risk management plan identifies risks at the start and during the program and defines strategies to prevent them from jeopardizing the success of the program. Effective identification and development of mitigation plans for these risks allows for more timely resolution if the risks ever present themselves as issues. Risks change during a program therefore; it is important to re-assess risks at different points throughout the program.

- **Risk Identification** – Determining which risks are likely to affect the program and documenting the characteristics of each.
- **Risk Assessment** – Evaluating the risks and risk interactions to assess the range of possible program outcomes related to probability of risk realization and impact if the risk is realized.
- **Risk Response and Mitigation Planning** – Defining mitigation and/or contingency plans and trigger events for risks to minimize program impact.
- **Risk Monitoring** – Executing the risk management plans in order to respond to risk events over the course of the program.
- **Risk Closure** – Closing a risk once it has been deemed no longer a risk and communicating the closure to necessary parties.

For each risk, a Program Management Risk Worksheet must be completed. All risk worksheets will be summarized and tracked in a risk matrix. The risk matrix will be evaluated on an as need basis but no less than monthly. Any known risks at program start are documented in the risk matrix. The risk matrix template is attached to this program charter for reference. Risks that fall into the yellow shaded boxes below will be included in the program status report.

Impact If Realized	Probability of Realization		
	High	Medium	Low
High	High/High	Medium/High	Low/high
Medium	High/Medium	Medium/Medium	Low/Medium
Low	High/Low	Medium/Low	Low/Low

Risk ID #	Risk Description	Assigned To	Prob. Of Realization (H, M, L)	Impact If Realized (H, M, L)	Risk Response (A,M,V,T)	Impacted Area(s)	Mitigating Actions
1	GA Code Date for PRODUCT XV3 slips past 12/19/18		M	H	Mitigate	All training and assessments derived from the education.	1) This will be tracked in ongoing status meetings.
2	SME availability	Unit Managers	H	H	Mitigate	PRODUCT xv SMEs all assessments	1) Identify and contact SMEs for each assessment effort- 2) Proactively get scheduled SME time -block time on their calendar 3) Block time to ask questions and work 4) Supplement SME effort with Process Analysts assist.
3	PTO and Holiday Time		M	H	Accept	All assessments and	1) Tighten timeline

						certifications planned	
4	Product, Documentation, Lab availability		M	H	Accept	All assessments and certifications planned	1) Leverage non- formal documentation 2) From a lab perspective-available for training not perf based assessment: proactively work with VIRTUAL ENVS on environment for teams and assessments
5	Assessment strategy not accepted by management	PM	L	M	Mitigate	All assessments and certifications planned	1) Revise to suit
6	For ICs and Imp Support- request both Major and Minor Cert focus	Res. Managers	H	M	Accept	Strategy for bi-level certifications	Major focus accomplished with 14 weeks of GA. Minor focus within 26 weeks of GA.

Scope Management

For guidelines on how to develop and agree on a change control process, refer to the Program Change Control Policy and Procedure document. An example high level process is provided below as a starting point for developing the specific process that will be followed for this program. You can document the process here or attach or reference the appropriate process document.

Option 1: Example change control process:

Managing scope is critical to ensure the program goals remain intact and are achieved on time and on budget. A program change control plan will be followed by the program. Any change request will be documented on a

Change Request Worksheet. Change Requests will be logged in the Change Control Log. Both the Change Request Worksheet and Change Control Log are attached to the program charter for reference.

Change requests will be discussed by the program managers and in program status meetings to bring clarity to the request and understand any broader implications of executing or not executing the change. If the program managers are unable to approve or reject the Change Request, it will be documented on the program status report and discussed with the executive sponsor to obtain direction.

When a Change Request has been approved or denied the program manager(s) must communicate to the necessary program personnel and impacted business units.

Option 2: Example of attaching or referencing a change control process document:

A change control process has been documented and agreed upon by the Company program and <insert customer resource approving the process>. The document name is <insert document name> and can be accessed <insert access instructions>.

Program Communication

Effective communication between all parties involved in the program is critical to program success. For this program, the targeted audiences and associated communication methods and frequencies are detailed in the communication matrix.

Targeted Audience	Owner	Purpose	Communication	Vehicle	Schedule / Frequency	Documentation
Executives, Steering Committee, Program Team)	Program Manager	Facilitate communication and issue resolution at the program level. Track progress to the program schedule.	Executive Program Status Report	Document	At end of the Program	Executive Program Status Report

Targeted Audience	Owner	Purpose	Communication	Vehicle	Schedule / Frequency	Documentation
Certification Program Team	Program Manager	Facilitate communication and issue resolution at the program level. Track progress to the program schedule.	Program Status Meeting	Meeting	Weekly	Meeting Agenda Updated Issues/Risks Database Meeting Minutes
Application and Technical Services Teams	Program Manager	Facilitate communication and issue resolution at the program level. Track progress to the program schedule.	Regular weekly App Services and Technical Services Meetings	Meetings	Weekly	Meeting Agenda Updated Issues/Risks Database Meeting Minutes
Sponsor(s)	Program Manager	Update sponsors with status and progress including critical issues, risks, and key decisions to be made.	Sponsor Update	Meeting	As Necessary	Meeting Agenda Meeting Minutes
Governance Committee	Program Manager	Facilitate communication and issue resolution at the program level. Track progress to the program schedule.	Program Status Meeting	Meeting	Weekly	Meeting Agenda Updated Issues/Risks Database Meeting Minutes
Program Manager Apps/Technical	Program Team (Process Analysts)	Status updates for Program Manager to use on status reports	Assessment Topic Status Report	SharePoint List	Weekly	% Complete Issues/Risks
SMEs (Assessment Developers)	Program Team (Process Analysts)/SDs	Communication between individual SMEs and Analysts on progress made re: Blueprints/Assessments, expectations, etc.	Intro to process Email Template Approval Email Template Assessment Start Email template Assessment QA Approved/Not Approved Email template	Email Meetings	As Needed per workflow	Process, timelines, status

Targeted Audience	Owner	Purpose	Communication	Vehicle	Schedule / Frequency	Documentation
All (exec, steering committee, sponsors, program team, SMEs) Apps Technical PMs	Program Manager	Kickoff – get everyone on the same page, same timelines, etc.	Official Program Start	Email	At start of program	High level timeline, just in time communication strategy, stay tuned for next steps, Goals, link to charter, etc.

Program Charter Approval

Authorized Signature – Customer Program

Manager

Authorized Signature – Company Program

Manager

Printed Name

Printed Name

Date

Date

Authorized Signature – Customer Sponsor

Authorized Signature – Company Sponsor

Printed Name

Printed Name

Date

Date