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TIFFANY HOLCOMB

PROJECT MANAGER & BRAND STRATEGIST

PROJECT SPONSOR

SVP, STRATEGIC INITIATIVES

PROJECT MANAGER

TIFFANY HOLCOMB

DATE SUBMITTED

AUGUST 13, 2021

PROJECT CLIENT

STRATEGIC INITIATIVES & DIGITAL PRODUCT TEAM

PROJECT CHARTER

PROJECT NAME

MEMBER EXPERIENCE AND NPS® SOFTWARE IMPLEMENTATION & PROGRAM REDESIGN

PROJECT DESCRIPTION

Implementation of Customer Retention Group (CRG) Net Promoter Score® software utilizing the Satmetrix's Net Promoter platform. Customer Retention Group (CRG) offers best-in-class benchmarking, with access to 500+ credit union scores, and shares recommendations on new credit union trends related to NPS® and member experience. Leverage enhancement reporting and survey functionality and integrate additional member feedback channels.

Development of an ongoing member experience analysis and escalation strategies, to support in identifying and addressing gaps, issues, and opportunities to provide a more effective member experience.

Must complete the project by January 1, 2022, when the contract with the current vendor will end.

PROJECT BOUNDARIES

The project is expected to enhance current survey capabilities, benchmarking, enhanced NPS® and member experience data, additional member communication functionality, and detailed reporting.

The project will leverage the data received to identify common terms and themes from member feedback, gaps in service or product offering, training improvements, trends, and other innovative opportunities.

KEY DELIVERABLES

1. Quarterly NPS®, OSAT, and competitor benchmark report
2. Development of Member Experience and NPS® analysis strategy
3. Automated member data extract
4. Rebranded, personalized dynamic surveys unique to transaction, location, and product
5. Platform dashboards and reports specific to user role

HIGH-LEVEL REQUIREMENTS

1. Implementation completed by January 1, 2022
2. Map data extract to include, member name, email, transaction date, transaction type, location, product, staff member who provided service or support
3. Ensure data extract is delivered to a secure FTP site
4. Validate surveys populate personalized data and data is accurate to what is in the CORE
5. Verify communication and escalation processes are in place and staff is trained
6. Validate dashboards and reports provide accurate data
7. Confirm user permissions and access align with organizational roles
8. Ensure accuracy of NPS®, OSA, Emotional Analysis, and competitor benchmark reports
9. Confirm survey send and randomization rules are configured

OVERALL PROJECT RISKS

1. Failure to complete implementation by January 1, 2022 , will prevent the collection of actional member experience feedback and result in a gap of NPS®, OSAT, and benchmarking data
2. Delivery of inaccurate member data via data extract could result in reputation risk, impact member retention, and potential legal impacts
3. Not implementing a communication and escalation process to member feedback could result in reputation risk and reduced member retention

PROJECT OBJECTIVES	SUCCESS CRITERIA
SCOPE	
Launch of enhanced member experience and NPS® software platform. Including the development of member experience analysis and escalation strategies	3% increase of Relationship, Branch, Digital, and Contact Center NPS® by the end of Q4 2022.

OUT-OF-SCOPE

Employee engagement survey and social media review integrations.

TIME

NPS® Platform Implementation	January 1, 2021

COST

4 Year Contract (with Implementation Fees) $118,500	Actual cost within 110% of budget

SUMMARY MILESTONES	DUE DATE
Phase 1: Rebrand Surveys and Update Content	9/15/2021
Phase 2: Configure & Validate Data Extract and Sampling Strategy	10/1/2021
Phase 3: Platform, Dashboard & Reporting Configuration	11/1/2021
Phase 4: Create Member Experience & NPS® Analysis Strategy	11/15/2021
Phase 5: Communication & Escalation Strategy Development	11/30/2021
Phase 6: User Training	12/15/2023
Phase 7: Soft Launch	12/20/2021
Phase 8: Go-Live	12/30/2021

FINANCIAL RESOURCES

Financial resources are approved by the CEO and Board, on March 1, 2021, and agreed by vote as an out-of-budget expense.

PROJECT TEAM

STAKEHOLDER	ROLE
Digital Products Manager	Develop member experience and NPS® strategies
Business Intelligence Analyst	Configure and validate data extract
VP Marketing	Ensure survey design and content are on-brand
Graphic Designer	Design and brand surveys
Marketing Content Specialist	Develop survey content

VP Consumer Administration & Operational Excellence	Create communication and escalation processes
AVP Training	Develop and implement training programs
Quality Assurance Specialist	Validation of member data and survey personalization accuracy
Network & Systems Administrator	Development and implementation of permissions and access by user role
Customer Retention Group (CRG) Implementation Specialist	Implementation and technical platform configuration

PROJECT EXIT CRITERIA

When Customer Retention Group (CRG) platform is unable to provide access to a secure FTP site for data extracts.
When the NPS® platform does not include competitive benchmarking functionality.
When the project ETC is over 110% of the budget contract cost.
When Customer Retention Group (CRG) implementation support is unresponsive or does not align with requirements in the SOW.

PROJECT MANAGER AUTHORITY LEVEL

STAFFING DECISIONS
In consultation with functional managers and L.O.B. leads.

BUDGET MANAGEMENT AND VARIANCE
Budget value for the project is $130,350. This includes a contingency reserve. The budget is based on an estimate of implementation and platform costs for a 4-year contract. of roll-up costs as given in the approved document. Any variance of up to ¼% may be approved by the project manager.

TECHNICAL DECISIONS
In consultation with the program and functional managers.

CONFLICT RESOLUTION
Manages first-level project conflict resolution.
Facilitates second-level of the project resolution.
Escalates third-level of project conflict resolution to the functional manager.
Refers any conflict greater than third-level to project sponsor.

SPONSOR AUTHORITY
Schedule and budget control
Technical platform requirements in consultation with the VP Consumer Administration & Operational Excellence, Digital Products Manager, and Business Intelligence Analyst.