GLOBAL TECHNOLOGY SERVICES

HOW DO I?

Project Plan

Prepared By: Laura Heintz

21 April 2015

Version 1.1

Experian Internal Communications
© Experian 2015

Revision History

Version	Revision Date	Author	Comments
1.0	31 March 2015	Laura Heintz	Initial Version
1.1	21 April 2015	Laura Heintz	Changed “Content Type” to “Content Category” throughout the document. Updated Related Documentation section to include workflow diagrams and additional documents. Added Roles and Permissions Matrix. Added link to project tasks in SharePoint group site under Detailed Work Breakdown section.

SAMPLE

Contents

SAMPLE

Objective

This project plan details the objectives, dependencies, strategies and time estimates for the “How Do I” Project. The final deliverable for this project is article content encompassing the GTS knowledge of all senior managers and designated Subject Matter Experts (SMEs). It is intended for internal users of the Experian Zoom site. This content will be developed in conjunction with the installation of the SharePoint site by Intelligent Decisioning.

This plan serves as a contract between the Internal Communications Group and the Intelligent Decisioning Project Team, establishing the groundwork for successful, timely completion of project content and integration into the SharePoint site. This includes the appropriate linking and tagging of articles, the instituting of related workflows, as well as the launching of analytics gathering and reporting.

The project deadline is set at ten weeks from the initial kickoff meeting. This deadline is contingent upon timely receipt of content from SMEs and the judicious alignment of milestones with the Intelligent Decisioning Project Team milestones.

Note that foreign language translation is not included in the initial scope of work for this project. The integration of the Bureaucracy Busting button is included.

Dependencies

Completion of the article content is dependent on the following:

- Timely completion of the questionnaire by managers
- Availability of SMEs for follow up questions/interviews
- Efficiency of the review cycle
- Adherence to the project schedule/requirements/scope
- Stability of the SharePoint site and features

Important: Changes to any of the above items will impact the deadline and may result in the incompletion of project content and/or the extension of the project completion timeframe.

SAMPLE

Glossary of Terms

The following terms are used throughout this document and the project.

Term	Definition
Analytics Dashboard	View that displays insight into most viewed, highest rated, least viewed, and lowest rated articles. Provides the option to generate reports.
Approver	Person responsible for reviewing and “signing off” on article content authorizing the article to be published to the “How Do I” site.
Approval Process	Method by which authored content is reviewed and published to the “How Do I” site.
Article	Topic information or content. Each article addresses one topic and contains link(s) to related or more detailed content.
Authoring Dashboard	View that displays articles in draft, articles about to expire and recently published articles with links to each type. It also provides the option to select a link to access the Authoring Page to create a new article.
Authoring Page	Page accessed via the Authoring Dashboard and used to add/update content articles. Page is also used by approvers to review and sign off on articles.
Authoring Process	Method by which a Content Owner can add content to the “How Do I” site.
Content Owner	Person responsible for creating/updating article content. The Content Owner’s name and group will display on the Content Page.
Content Page	Page containing article content. There is a one-to-one relationship between a topic and a content page.
Content Category	Specific term used to categorize article content within the “How Do I” site. A list of content categories will appear on the left side of the landing page as links. These links will allow the user to quickly access information on one of the content category’s topics.
Dashboard	The “How Do I” site contains two types of dashboards: Authoring Dashboard and Analytics Dashboard. Please refer to those terms for specific definitions.
Disposition Process	Method by which an article, based on the Expiration Date, is removed from the “How Do I” site and archived for reference.
Expiration Date	A day determined by the Expiration Policy on which article content will no longer be valid, requiring the Content Owner to review/update/dispose of the article. This sets into motion the authoring/approval/disposition process. Please refer to those terms for specific definitions.
Landing Page	The main page or home page of the “How Do I” site. The Landing Page contains a search feature and a list of content categories that appear on the left side of the page as links. These links will allow the user to quickly access information on one of the content category’s topics.
Manager	For the purpose of this project, the GTS Manager will be the final approving authority for creating/updating article content. This person may serve as the Content Owner or designate a Subject Matter Expert to develop content and serve as the Content Owner. The Manager will also have authority to expire article content
Owner	See Content Owner.
Page	The “How Do I” site contains four types of pages: Landing Page, Results Page, Content Page, Authoring Page. Please refer to those terms for specific definitions.
Results Page	Page that displays article extracts or snippets based on search criteria or link selected on the Landing Page. The left side of the page displays options to refine the delivered results.

SAMPLE

Term	Definition
Subject Matter Expert (SME)	The person most knowledgeable on the topic described in the article. This person may be the Content Owner or someone authorized by the Content Owner to provide content or review content.
Tag	Checkbox located on the left side of the content page. Checking the box allows the user to further refine the search content display.
Taxonomy	Specific terms compiled throughout the project to generate content categories, links and tags to related content.
Template	Preset page layout provided to authors enabling them to enter content, images, links, etc. into established article format without any design or setup required.
Topic	Subject matter of an article. Each article will focus on one topic.
User	End-consumer of the How Do I? site. The person utilizing the content to gain knowledge or solve a problem. This person has the option to provide feedback on each article.

SAMPLE

Schedule

The following table details the high level milestones for the ten week project.

Weeks	Week 1-2	Week 3-4	Week 5-8	Week 9-10
Phase	**Assessment**	**Definition**	**Development**	**Integration**
Activities	▪ Kickoff Meeting ▪ Develop/Distribute Questionnaire ▪ Follow up Questions/SME Interviews ▪ Identify Additional Stakeholders ▪ Develop Comms Plan ▪ Create Content Tracking Strategy ▪ Begin Developing Taxonomy Spreadsheet	▪ Finalize Content Categories ▪ Define Page/Dashboard Layouts ▪ Generate Governance Document (workflow policies & processes) ▪ Develop Analytics Strategy & Reporting Process	▪ Create Article Content ▪ Facilitate SME Reviews ▪ Incorporate Edits ▪ Finalize Approvals ▪ Begin linking/tagging	▪ Port Content to SP Site ▪ Create/Test Links & Tags ▪ Test Analytics ▪ Go Live!
Milestones	Align with Intelligent Decisioning Milestones			

The Schedule consists of the following phases:

- Assessment
- Definition
- Development
- Integration
- Publishing

These phases are discussed in the following sections.

Assessment

This two week phase initiates with a kickoff meeting in which all 125 department managers will be provided information on the project and their roles in the gathering and developing of article content. During this phase, a questionnaire will be developed and distributed to all department managers. This questionnaire will ask each manager to provide a description of his/her department, the services the department provides and a minimum of five issues that are addressed by the department along with resolutions. This information will be used by the technical writer to develop the “How Do I?” article content. Once this content has been collected, it will be reviewed and organized into logical content categories.

A taxonomy spreadsheet will be created and used later in the project to develop content categories, links and tags to related content for the site. If necessary, interviews will be set up with managers or designated SMEs to gather additional information or answer questions about provided content. A content tracking spreadsheet will be created to facilitate content collection and identify gaps. Additionally, this tool will be utilized throughout the approval process until each article is finalized and ready to be published to the site.

Also during this phase, additional stakeholders may be identified to assist in the collection and development of content for the site. A comprehensive communication plan will be created to deliver a consistent message to all engaged parties. The communication plan will ensure the stakeholders’ understanding of the project goals and encourage positive attitudes influence the success of the project.

Definition

During the two week definition phase, content categories will be finalized. These terms categorize article content within the “How Do I” site. A list of content categories will appear on the left side of the Landing Page as links. These links will allow the user to quickly access relevant information. The Landing Page, Results Page, Authoring Page and Content Page layouts will be finalized during this phase. The Authoring Dashboard and Analytics Dashboard design will also be confirmed.

Additionally, a workflow governance document will be created. This document will include the article authoring process, article updating policy, article approval process, and the article expiration policy and disposition process. Also during this phase, the analytics strategy and reporting process will be developed.

Development

The development phase consists of four weeks of content development, SME review and final approval of the content that will be published to the site. The proposed review process will include:

- Informal reviews: A cooperative process of informal technical reviews with Content Owner/SME to validate content. This process may require several reviews by the Content Owner/SME and edits by the writer.
- Formal reviews: The writer will provide final article content to the GTS Manager. Final comments/edits will be incorporated into content and then the article will go for a final approval.
- Final approval: The writer will provide the final article to GTS Manager and request a “signoff” that the article is ready to be published to the site.
- Internal Communications review for consistent use of standards and template before article is published to the site.

Once reviewed/approved, the article file will be ready to be published to the site. Also during this phase, the automated linking and tagging of content will commence.

Integration

This two week phase includes the integration of all finalized articles into the SharePoint site. It also includes the continued creation of links to related content or more detailed information as well as the generation of tags. All links/tags will be tested during this phase. Analytics will also be tested during this phase.

Publishing

This is the “Go Live” phase where the site and all content will be accessible to all users.

Related Documentation

The following documents relate to this project plan.

- Content Gathering Questionnaire – “Knowledge Form” (with instructions and example form)
- Stakeholders Communication Plan
- Content Tracking Spreadsheet
- Content Categories Spreadsheet
- Site Governance Policies & Processes
    - Article Authoring/Updating Policy & Process
    - Article Approval Process
    - Expiration Policy & Archival Process
- Workflow Diagrams
    - Initial Article Development
    - Update to Article
    - Review Cycle
    - Initial Article Approval
    - Update Article Approval
    - Article Archival Process
    - User Feedback Process
- Analytics Strategy & Reporting Process

Content Gathering Questionnaire

The form below is an example of the questionnaire that will be sent to the GTS managers.

Knowledge Form

Department Information

Manager Name: ______________________ Content Owner(s): ______________________

Department: ______________________ ______________________

LT Member Name: ______________________ ______________________

Department Description

My department is responsible for ...

Services

Please list all services an Experian employee might contact you about:

Common Questions

(Please feel free to add more pages as necessary)

Please provide common questions/resolutions about the services listed above:

Question # 1: ______________________

Description: ______________________

Resolution: ______________________

Question # 2: ______________________

Description: ______________________

Resolution: ______________________

Questions # 3: ______________________

Description: ______________________

Resolution: ______________________

Roles and Permissions Matrix

The Roles and Permissions Matrix defines the roles and permissions for creating/updating/viewing site content. The Matrix is below.

Roles and Permissions Matrix	Administrator	GTS Manager	Content Owner	SME	Internal Comms	Global User	Regional User	Local User
Create user account	X							
Set read-writer access levels	X							
Assign roles	X							
Update role profiles	X							
Assign Content Owner	X	X						
Delete Content Owner	X	X						
Assign SME	X	X	X					
Delete SME	X	X	X					
Create articles	X	X	X		X			
Update articles	X	X	X	X	X			
View articles	X	X	X	X	X	X	X	X
Review articles		X	X	X	X			
Rank articles	X	X	X	X	X	X	X	X
Provide feedback on articles	X	X	X	X	X	X	X	X
Create analytics	X							
View site analytics	X	X			X			
View article-specific analytics	X	X	X		X			
Manage site announcements	X				X			

Detailed Work Breakdown

The Detailed Work Breakdown identifies each task element of the project and the resource(s) required for completing each task in order to deliver the project within the assigned timeframe.

The detailed work breakdown can be found at: http://zoomglobal/projects/howdoi/SitePages/Home.aspx