

## Project Initiation Document

**Project Sponsor: Richard Ellis**

**Version: 1.0**

**Date: 2<sup>nd</sup> July 2009**

### Document Control

**Project Sponsor Richard Ellis**

**Project Call Recording and Workforce Management**

**Document PID - Call Recording and Workforce Management**

**Author Clive Jones**

**Published Date 7<sup>th</sup> July 2009**

**Version 1.0**

### Change History

The document is to be submitted to the relevant Strategic Board (e.g. CAMG/ LTB) for approval and signoff.

Thereafter amendments are to be approved by the appropriate change control procedures.

Issue	Date of Issue	Comments/Reason for change
1.0	7 <sup>th</sup> July	First issue for CAMG approval

### Distribution

Name	Position	Organisation
CAMG Members	Authorisers of Capital Expenditure	Central Bedfordshire Council

### Abbreviations

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## **1. Introduction**

At the Central Bedfordshire Executive on the 15<sup>th</sup> December, the Executive approved the procurement of the core telephony infrastructure. At the time of writing that report the full requirements and costs of the Contact Centre infrastructure were not known. The Executive requested that the infrastructure be procured, deployed and a subsequent report be presented to the Executive on the total cost of the Contact Centre once complete. The requirements for the Contact Centre are now fully known and this report is presenting those capital requirements to the Capital Assess Management Group for authority to spend against the existing Capital Scheme entitled Mid and South Bedfordshire T-Government Agreement.

## **2. Objective**

The objective of the procurement is to acquire Contact Centre Voice Recoding and Workforce Management software to enable the contact centre to provide customer services to the citizens of Central Bedfordshire. Workforce management is essential to enable the authority to schedule customer service advisors efficiently in line with call demand patterns. Call recording provides a necessary audit trail for contact centre customer transactions and is used in the training of Customer Service Advisors to improve the quality of service delivery. Both of these items existed in the previous County Council infrastructure. The solution has been technically assured by ICT and a tendering process has occurred with the cheapest solution being selected.

## **3. Scope**

The procurement includes:

- The purchase of the Workforce Management and Voice Recording software licences.
- The installation and configuration of the software to the user specification.
- Remote telephone support for 12 months.
- The interface development, installation and testing between the Cisco call manager and the Workforce Management software.

Excluded from the project is any additional configuration required after the initial configuration and the cost of any additional server hardware that may be required. Server hardware will be sourced by ICT if this proves to be necessary.

## **4. Description of Work**

The supplier will provide the Workforce Management and Voice Recording software and install, configure and test on the designated hardware.

System testing of the installation will be performed by the supplier before it is handed over to the Customer Services Team for user acceptance testing.

ICT will have to accept the server installation for technical compliance with Central Bedfordshire's standards.

From installation commencement to being ready for user acceptance testing will take six weeks. The supplier will provide a detailed project plan on receipt of the purchase order.

## 5. Financial Issues

Funding is proposed to come from the existing Mid and South Bed T-Government Partnership Capital scheme. The current fund was earmarked for the procurement and deployment of a Customer Relationship Management (CRM) System. CRM is unlikely to be deployed this year and is not expected to cost as much as initially anticipated leaving money available within the existing budget. A re-phasing of this scheme will be required to enable the procurement to occur this year bringing capital money forward from subsequent years.

The fund is currently allocated over the next five years as:

Description	2009/10	2010/11	2011/12	2012/13
Mid & South Beds T-Government Partnership	109,600	116,200	123,200	130,600

The budgeted costs of the project are:

Description	Total
<b>IEX to Cisco Integration</b>	
IEX to Cisco Integration	£25,000
First year support for IEX to Cisco Integration	£7,000
<b>Total</b>	<b>£32,000</b>
<b>Software</b>	
Nice Perform Advanced - 100 Seats	£26,337
Nice TotalView – 100 Agents	£16,272
NICE Capture Platform	£12,617
NICE Storage Centre	£2,812
NICE Encryption	£11,794
<b>Total</b>	<b>£69,833</b>
<b>Services</b>	
Perform Installation, Training & Project Management	£38,295
IEX Installation, Training & Project Management	£6,600
IEX Integration	£6,160

<b>Total</b>	<b>£51,055</b>
<b>Maintenance</b>	
Standard Annual Maintenance	£21,565
<b>Total</b>	<b>£21,565</b>
<b>Server Hardware</b>	
Call logging server	£8,000
<b>Total</b>	<b>£8,000</b>
<b>Grand Total</b>	<b>£182,453</b>

Therefore the re-phasing of the Mid and South Beds T-Government Partnership Capital scheme is proposed as:

Description	2009/10	2010/11	2011/12	2012/13
Mid & South Beds T-Government Partnership	250,000	200,000	20,000	9,600

This will enable some initial investigation of CRM to occur this year with the initial deployment of a CRM solution occurring in 2010/11.

The cost to the authority is £182,453. It is expected that the use of the workforce management software should save at least the equivalent of two customer service advisers per year. This would mean the system will pay back well within four years. The key benefits to the authority is not in monetary terms, but rather in the improved quality that the systems will facilitate by ensuring the appropriate resources are always available to meet the service levels of the authority.

£250,000 has been suggested to be re-phased for this years expenditure to enable the additional procurement of switchboard facilities and wall boards which still have to be tendered for.

## 6. Roles and Responsibilities

The project will be led by the Aubrey Smith as the Project Manager. The full project team is:

Name	Location	Responsibility
Aubrey Smith	Priory House	Project Manager
Bernie McGill	Melbourne House	Senior User
Hannah Richards	Priory House	Senior Executive
NICE Project Manager	TBA	Senior Supplier

Cisco Project Manager	TBA	Supplier
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## **7. Timescale**

The project will take six weeks to complete from the date of the purchase order being received by the supplier.

## **8. Conditions / Constraints / Risks**

The key factors that will impact the success of the project are:

- The core telephony infrastructure of the contact centre has to be deployed before workforce management software and voice recording is deployed.
- Staff have to receive adequate training to utilise the workforce management software.
- The system must be fully tested before it obtains user acceptance.
- ICT resources need to be available at the appropriate time to enable the supplier to progress with the installation.
- Some of this activity will have to be performed out of normal business working hours.



Risk Assessment  
Rev 0.1 20/03/09

<b>Project Title</b>	<b>Call Recording and Workforce Management</b>
<b>Project Sponsor</b>	<b>Richard Ellis</b>
<b>Programme / Project Manager</b>	<b>Aubrey Smith</b>
<b>Completion Date</b>	<b>30<sup>th</sup> September 2009</b>

Risk Description	Risk Score		Control Measures	Cost / Resources	Owner	Residual risk scores	
	Likelihood *(1 – 3) {a}	3				Likelihood * (1-3) {a}	2
<p>Without IEX WFM it is not possible to produce effective and efficient schedules which match the call demand. Inaccurate schedules are either costly, as more staff are required, or impact on service delivery with a huge impact on the reputation of the council as.</p> <p>Without Call Recording it is not possible to carry out large scale quality assurance across CBC.</p>	Impact* (1 – 3 ) {b}	3	<p>A temporary IEX server has been installed to see through the gap between 1<sup>st</sup> April to new install of IEX WFM. This solution does not delivery the full capability of the system and only services 50% of the staff.</p> <p>8 temporary agency staff have been employed until the new telephony &amp; IEX WFM are deployed.</p>	<p>£2,500</p> <p>£65,000 (contracted from April 1<sup>st</sup>, 80% spent).</p>	<p>Clive Jones</p> <p>Hannah Richards</p>	Impact* (1-3) {b}	2
	Risk {a} x {b}	9				Score {a} x {b}	4

Additional Control Measures considered	Cost / Resources	Owner	Adjusted risk scores	
<b>Additional side by side monitoring of agent quality is required. This places a large amount of administration overhead on the team managers across customer services and does not accurately capture the true quality of service provision.</b>	<b>Extra time required from all Team Managers.</b>	<b>Bernie McGill</b>	<b>Likelihood *(1-3) {a}</b>	<b>2</b>
			<b>Impact * (1 – 3) {b}</b>	<b>1</b>
			<b>Score {a} x {b}</b>	<b>2</b>