PROJECT PLANNING PHASE

Date	02 NOV 2025
Team ID	NM2025TMID01660
Project Name	Streamlining Ticket Assignment for efficient support operations
Maximum mark	5 marks

The **Project Planning Phase** transforms the prioritized strategies for streamlining ticket assignment into a clear, actionable roadmap. This phase involves defining the **scope** of the assignment solution (e.g., will it include chat tickets or only email?), establishing **Key Performance Indicators (KPIs)** to measure success (e.g., Target MTTR reduction, Target reduction in Re-assignment Rate), and creating a detailed **work breakdown structure (WBS)**. The WBS breaks down the chosen high-impact initiatives— such as implementing skill-based routing or setting up automated triage rules— into discrete tasks, assigning a clear **owner**, necessary **resources** (tools, budget, personnel), and a realistic **timeline** for each. A critical output is the **Risk Management Plan**, which identifies potential roadblocks (e.g., data quality issues in agent skill profiles, resistance to new workflows) and outlines mitigation strategies. Ultimately, this phase culminates in a final **Project Charter** or execution plan that aligns all stakeholders on the budget, timeline, desired outcomes, and governance structure before moving into the execution and implementation stage.

Product Backlog (Prioritized Features)

The Product Backlog is the master list of everything that needs to be done. It is prioritized based on business value.

ID	Feature Description	Priority	Effort Estimate (T-Shirt Size)	Stakeholder
PBI-001	**Predictive Group Assignment (AI/ML)**: Implement and train the initial Predictive Intelligence (PI) model for automatic assignment group recommendation/setting.	**Must Have**	L	Support Manager
PBI-002	**Basic Assignment Rule Setup**: Configure fundamental, non-AI assignment rules (e.g., based on CI, Service, or Location) and define fallback groups.	**Must Have**	S	Support Manager
PBI-003	**Agent Capacity and Availability Logic (AWA)**: Implement Advanced Work Assignment (AWA) to track agent capacity and real-time availability status for individual assignment.	**High**	L	Support Manager
PBI-004	**Skill-Based Routing**: Define and map support agent skills to assignment groups and enable skill-matching in the assignment logic.	**High**	M	Support Manager
PBI-005	**Automated Notification Configuration**: Configure instant email and in-platform notifications to agents and users upon assignment/reassignment.	**Medium**	S	End-User, Agent
PBI-006	**Assignment Performance Dashboard**: Create a Performance Analytics (PA) dashboard to track MTTA, Assignment Accuracy, and Reassignment Count.	**Medium**	M	Support Manager
PBI-007	**Auto-Reassignment/Escalation Workflow**: Build a workflow to automatically reassign tickets that have been unhandled for a set period.	**Low**	M	Support Manager

Sprint Planning

We'll define a high-level plan for two-week sprints.

Sprint 1: Foundation&Predictive Group Assignment (Focus: Group Routing)

- **Duration:** 2 Weeks
- **Goal:** Achieve reliable automatic assignment of the correct *Assignment Group*.

Story ID	Description (Based on PBI)	Story Points

Story ID	Description (Based on PBI)	Story Points
S1-1	**PI Model Setup&Training:** Configure the PI Classification solution, ingest historical incident data, and execute the initial model training.	8
S1-2	**Basic Rules Configuration:** Implement foundational assignment rules based on **Service** and **CI** (PBI-002).	5
S1-3	**Predictive Group Integration:** Integrate the trained PI model into a **Business Rule** or **Flow Designer** to automatically set the **Assignment Group** on new tickets (PBI-001).	5
S1-4	**Fallback Group Logic:** Define and test the logic for routing a ticket to a manager/fallback group if the PI model cannot confidently predict the group (part of PBI-002).	3
S1-5	**Agent Notification:** Configure basic notifications to the assigned group for a new ticket (part of PBI-005).	2

Sprint 2: Agent-Level Load Balancing&Metrics (Focus: Individual Assignment)

- **Duration:** 2 Weeks
- **Goal:** Achieve efficient assignment to the *individual agent* and establish performance metrics.

Story ID	Description (Based on PBI)	Story Points
S2-1	**AWA Capacity Setup:** Enable and configure **Advanced Work Assignment (AWA)** to track agent **capacity** (e.g., max 5 open P3 incidents) and current **status** (PBI-003).	8
S2-2	**AWA Load Balancing:** Integrate AWA's **Round Robin** or **Least Busy** logic to assign the ticket to an individual agent within the group (PBI-003).	5
S2-3	**Skill Definitions&Mapping:** Define the initial set of 10 core skills (e.g., *Networking L2*, *SAP Admin*) and map them to relevant agents (PBI-004).	5
S2-4	**Initial PA Dashboard:** Build the core **Assignment Performance Dashboard** to display MTTA and Reassignment Counts for the new process (PBI-006).	5
S2-5	**Agent/User Notifications:** Finalize customized notifications to the **Assigned To** agent and the **Caller** upon assignment (PBI-005).	3

User Stories and Story Planning (Example Detail)

To ensure clarity and testability, each backlog item is broken down into detailed **User Stories**. We'll use **Story Points** (a Fibonacci sequence: 1, 2, 3, 5, 8, 13...) to estimate complexity and effort.

PBI-001: Predictive Group Assignment (AI/ML) Details

User Story	Acceptance Criteria (Definition of Done)	Story Points
S1-1: PI Model Setup&Training	1. The PI Classification Solution is configured for the Incident table. 2. A minimum of 5,000 historical, closed incidents have been used to train the model. 3. The initial model's **precision score is $\ge 80\%$** for the top 3 assignment groups.	8
S1-3: Predictive Group Integration	1. A Flow Designer is configured to run on new Incident records. 2. The flow successfully calls the PI model for assignment prediction. 3. The **Assignment Group** field is automatically set to the predicted value when the confidence score is $\ge 70\%$. 4. A successful assignment is logged in the **Activity Stream** with the source "Predictive Intelligence."	5

PBI-003: Agent Capacity and Availability Logic (AWA) Details

User Story	Acceptance Criteria (Definition of Done)	Story Points
S2-1: AWA Capacity Setup	1. The **Advanced Work Assignment** plugin is active. 2. A Capacity Rule is defined that restricts a P3 Incident queue agent to a maximum of 7 active tasks. 3. Agents can manually set their availability status (e.g., Available, Busy, Offline) in the Agent Workspace.	8
S2-2: AWA Load Balancing	1. For a ticket already assigned to a Group, AWA is triggered to find an individual agent. 2. The agent with the **lowest current capacity load** (or Round Robin, if loads are equal) is selected. 3. If no agent is available/below capacity, the ticket remains unassigned in the group queue, and a notification is sent to the Group Manager.	