



Contact Center Optimization

PROJECT STATUS REPORT

The American Dream

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PJM 6210 – Communication Skills for Project Managers

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Northeastern University

Project Background

The organization receives a substantial number of customer support calls, approximately 186,000 annually across 2,134 store locations. These calls cover a wide range of issues, including general inquiries, technical assistance, vendor dispatch requests, and misdirected calls. The high call volume places significant demands on various departments, such as Store Repair Support, Fleet Support, and Store Operations Support, each offering different levels of phone support. To address these operational challenges, the organization initiated a transformational project aimed at streamlining and enhancing the efficiency of its customer support system. The goal is to better allocate resources, improve customer service quality, and reduce the workload on the departments. (Bolick & Northeastern University, 2019)

Phase 1 pilot experiment was conducted in a specific region as part of the effort. Three main goals were set for this pilot project: classifying all incoming calls as either first or analyzing the call data to see whether the project's full extent could be implemented.

Business Case

The current challenge revolves around enhancing the efficiency of the existing support processes, which are seen as inefficient and time-consuming for store staffs. Store managers currently face difficulties with three separate contact numbers, leading to frequent mistakes in routing calls to the correct department. This frequently leads to unnecessary call transfers and unhappy customers.

The main objective of the Contact Center project is to establish a centralized support system for stores. This system seeks to merge first-level support calls into a single contact point, simplifying operations. Furthermore, it will guarantee the efficient management of second-level technical support and the dispatch of work orders to contracted vendors by the respective departments. (Bolick & Northeastern University, 2019)

Project Status Reports - Approaches and Comparison

The approach to creating the project status reports for the 'Contact Center' project involves a structured and comprehensive methodology that aims to provide a clear overview of the project's progress and key components.

The report begins with essential project information, including the project name, code, project manager, and projected completion date. This establishes a quick understanding of the project's context. Also, there is identification of key stakeholders, both at the leadership and team levels, is crucial for understanding who is involved and invested in the project's success. The report offers a concise summary of the project's overall status and health, indicating that it is 'on track.' This initial assessment sets the tone for the report. A visual representation of the project's timeline, including milestones, helps readers grasp the project's journey from initiation to completion. This section provides an overview of the project's components, including their status, ownership, and potential risks. It highlights that the project is currently on budget and on track.

The report highlights significant achievements, such as the successful pilot execution, effective support call categorization, data collection, feasibility assessment, and a strong foundation for subsequent project phases. A brief but informative summary is provided to give a high-level view of the project's progress, achievements, concerns, and prospects. The report outlines objectives and measures of success for the upcoming project phases, emphasizing the importance of store participation, lessons learned, streamlined processes, and resource optimization.

Overall, the approach to creating the status reports for the 'Contact Center' project is organized, data-driven, and action-oriented. It ensures that stakeholders receive a concise yet comprehensive view of the project's status and its path forward. This approach contributes to

effective project management and decision-making, enabling the project team to stay on track and address potential challenges as they arise.

Status Reports Analysis – Keep Informed vs. Keep Satisfied

The first status report offers information that is noticeably more extensive. This report is composed for the ‘Keep Informed’ stakeholders of the project, who has ‘Low’ power and ‘High’ interest. The report includes:

- More details regarding important parties, such as team names and vice presidents.
- A thorough financial update, issues with resources, and more details on the project's constituent parts.
- A thorough analysis using certain measures of the pilot phase's performance.
- A summary of the lessons learnt and the strengths.
- A longer list of hazards that have been found along with thorough advice.
- A detailed action plan that includes goals, success indicators, and information on how to expedite the call process for upcoming stages.
- Other important data points and analysis attached as annexures.

On the other hand, the second report is shorter and provides a higher-level summary of the project. This report is composed for ‘Keep Satisfied’ stakeholders, who has ‘High’ power and ‘Low’ interest. The Keep Satisfied report’s main points of emphasis are the resources, budget, milestones, and possible dangers. Less detailed information on accomplishments and future work for Phases 2 and 3 is also provided.



PROJECT STATUS REPORT I

Low Power, High Interest Stakeholders

PROJECT STATUS REPORT

PROJECT NAME	Contact Centre Optimization	PROJECT CODE	PJ002
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PROJECT MANAGER	DATE OF STATUS ENTRY	PROJECTED DATE OF COMPLETION
<i>The American Dream, Billy Caldwell</i>	<i>March 2023</i>	<i>August 2023</i>
KEY STAKEHOLDERS		
PROJECT TEAM	<i>VP Contact Center (Paulette Larson- Key Sponsor), VP Store Operations (Rickey Spencer), VP Store Repair Support (Francis Scott), VP Fleet Support (Max Fox)</i>	
KEY STAKEHOLDERS	<i>Contact Center Team, Store Repair Team, Store Operations Team, Fleet Support Team, Store Managers</i>	

OVERALL PROJECT STATUS

OVERALL PROJECT HEALTH	ON TRACK
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EXECUTIVE SUMMARY

Overview: The 'Contact Centre Optimization' project is aimed at enhancing customer service and operational efficiency across 2,134 store locations. The project's core objective is to consolidate support operations, streamline communication, and improve first-level support, ultimately reducing the burden on our stores and optimizing asset management. (Bolick & Northeastern University, 2019)

Key Highlights:

Phase 1 Success: The project is progressing as planned, with Phase 1, the Pilot phase, well underway and showing significant progress.

Proactive Resourcing: The project team has proactively addressed resourcing and scalability concerns by proposing recommendations to ensure that the project is well-equipped to meet growing demands efficiently.

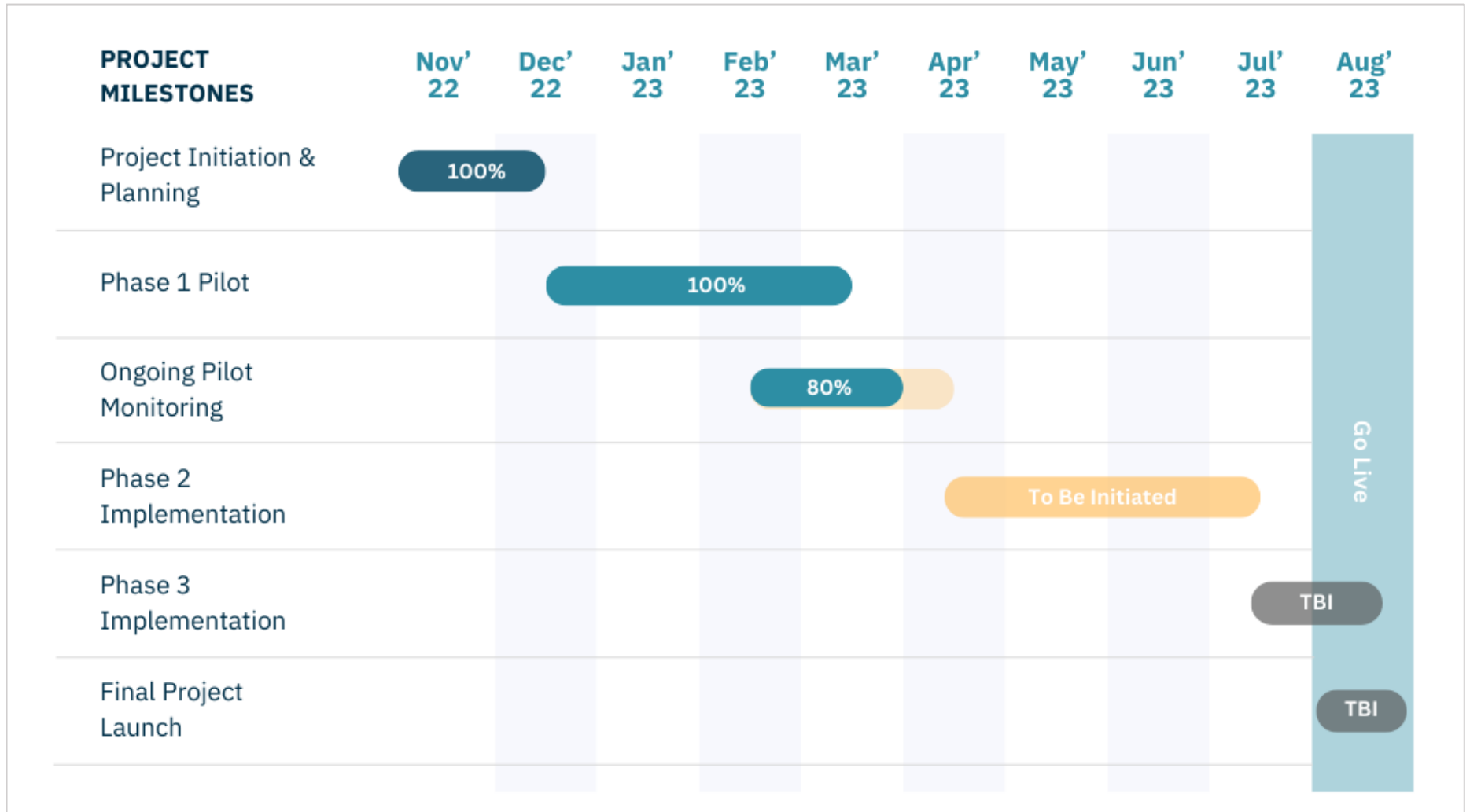
Scope Adherence: The project remains closely aligned with its defined objectives and goals, ensuring delivery of intended outcomes.

Risk Mitigation: The team has diligently identified and addressed emerging risks and roadblocks, by structured recommendations to minimize disruptions.

Timely Execution: The project timeline is well-managed, with no significant delays or deviations, signaling readiness for a successful conclusion.

With the current progress, the project would conclude on schedule in August 2023. The accomplishments in the Pilot phase, combined with proactive management of resourcing, scalability, scope, and risks, reflect a well-positioned project, set to meet its objectives as planned. (Bolick & Northeastern University, 2019)

PROJECT TIMELINE



PROJECT MILESTONES

Milestone	Description	Milestone Target	Owner/Team Responsibility	Flexibility Level (H/M/L)	Status
Project Initiation & Planning	<ul style="list-style-type: none"> Project approval from Sponsors Project Kickoff Meeting Project Charter Approval Project Plan Approval Project Scope Sign Off 	November, 2022	Project Sponsors and Project Management Team	High	Completed
Phase 1 - Pilot	<ul style="list-style-type: none"> Identify Pilot Districts Contact Center Training provided (all Agents) Call Data Analysis 1st Level Scripts Development Application of Lessons Learned Complete Phase 1 Pilot 	December, 2022 - April, 2023	Project Management, Contact Center, Store Operation Support, Store Repair Support and Fleet Support Teams	Medium	In Progress
Phase 2 - Expansion to 50% of Stores	<ul style="list-style-type: none"> Expand the project to cover 50% of store locations Monitor call volume and agent workload to prevent overloading. Apply lessons learned from Phase 1 	April, 2023 - July, 2023	Project Management, Contact Center, Store Operation Support, Store Repair Support, Fleet Support, Stores, Vendors Teams	Medium	To be Initiated
Phase 3 - Implementation Across All Stores	<ul style="list-style-type: none"> Implement the project across all stores, districts, regions, and divisions in the USA. Ensure 100% store participation and coverage. 	July, 2023 - August, 2023	All project teams	Low	To be Initiated

PROJECT COMPONENTS

COMPONENT	STATUS	OWNER / TEAM	NOTES
BUDGET	ON BUDGET	Project Sponsors and Project Management Teams	<p>Cost is well-managed, the difference between planned and actual cost is positive.</p> <ul style="list-style-type: none"> The total estimated Phase 1 budget was \$340,000, and as of the current status, \$337,000 has been expended.
RESOURCES	POTENTIAL RISKS	Project Management Team, Contact Center Team, Store Operations, Store Repair and Fleet Support	<p>Resourcing could potentially become an issue as the project scales up to include more stores and districts. Recommendations have been made to control the risk of resource scarcity.</p> <ul style="list-style-type: none"> Phase 1 Pilot was implemented with only six Contact Center Agents. Phase 2 may need more than eighteen Contact Center Agents. Additional software licenses will not be available due to funding constraints.
TIMELINE	ON TRACK	Project Management Team, Contact Center Team, Store Operations, Store Repair and Fleet Support	<p>Project is progressing as planned, with the successful completion of the Phase 1 pilot, training, and scheduled progression to subsequent phases, indicating an on-track project timeline.</p>
SCOPE	ON TRACK	Project Sponsors and Project Management Teams	<p>Project's scope, involving the centralization of support calls, is on track, with the successful Phase 1 pilot and planned progression to subsequent phases aligning with the intended scope.</p>

KEY ACHIEVEMENT / ACCOMPLISHMENT

ACTION ITEM	DESCRIPTION
Successful Pilot Execution	Successful execution of the pilot in all districts for 60 days. Pilot is completed according to planned schedules, adhered to set timelines and budget.
Support Calls are Categorized	All support calls were categorized effectively as either 1st or 2nd level support for better understanding of the nature and volume of support requests.
Documentation of Data and Analysis	Project teams successfully collected data on the support calls during the pilot phase. Meaningful data like types of issues, call durations, frequency are analyzed thoroughly to gain better insights.
Feasibility Assessment	Enhanced analysis of data collected provides better insights into the feasibility of the project scope. Determined the effectiveness, practicability and benefits of the centralizing support services and call processes approach.
Pilot Evaluation	Identify strengths and weaknesses of the processes in the pilot phase. These retrospectives can be used to improve the approach, processes and ensure success in Phase 2 and Phase 3 of the project.
Project Milestone	The successful completion of Phase 1 serves as a foundation for the project's subsequent phases.

PILOT PERFORMANCE EVALUATION (Bolick & Northeastern University, 2019)

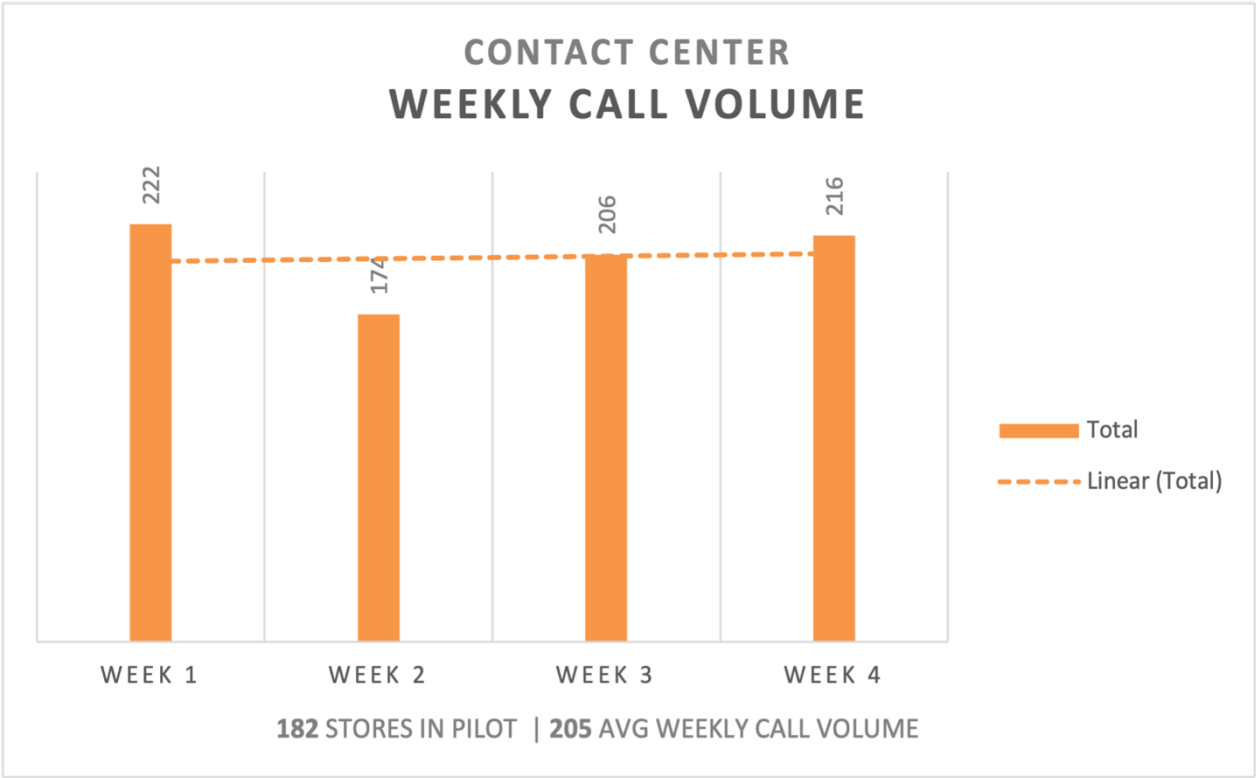


Figure 1 Contact Centre Weekly Call Volume

Call Volume	1st Level Resolution	2nd Level Transfer Rate
818	27%	42%

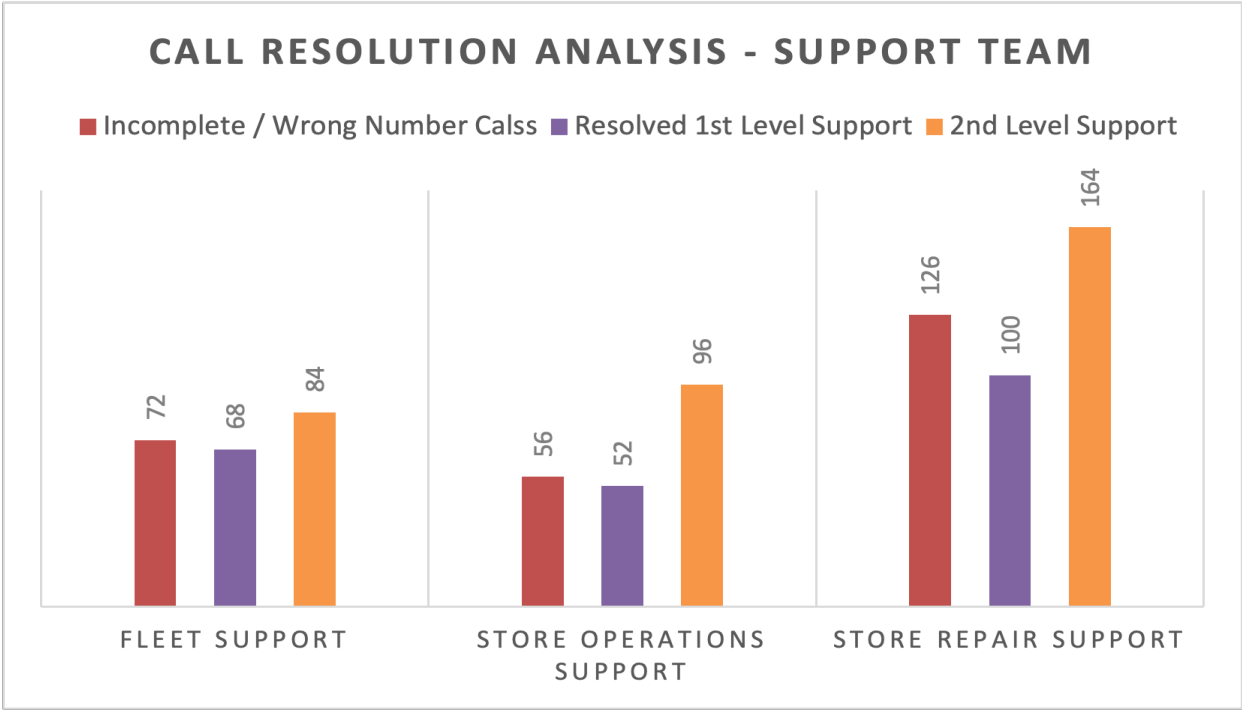


Figure 2 Call Resolution Analysis for Support Teams

Resolution Description	Fleet Support	Store Operations	Store Repair	Grand Total
Incomplete / Wrong Number Calls	72	56	126	254
Resolved 1st Level Support	68	52	100	220
2nd Level Support	84	96	164	344
Grand Total	224	204	390	818
Overall Resolution Rate	68%	73%	68%	69%
Contact Centre Resolution Rate	30%	25%	26%	27%

Strengths	Lessons Learned
<ul style="list-style-type: none">● Agent Resolution Rates: Agents achieved satisfactory rates of correct call resolutions on the first attempt.● Call Type Analysis: Detailed analysis identified more frequent call types, helping in targeted agent training and resource allocation.● Efficient Data Handling: Streamlined data collection and analysis processes, reducing delays and improving decision-making.● Operational Metrics Consistency: Consistent adherence to operational metrics during the pilot phase, ensuring stable performance.	<ul style="list-style-type: none">● Call Transfer Rates: Elevated call transfer rates indicated a need for improved routing strategies and comprehensive agent training.● Incomplete/Wrong Number Calls: Instances of calls being incomplete or misdirected underscored the need for system improvements and additional agent training.● Escalation Rates: A considerable number of calls requiring transfer from 1st to 2nd level support highlighted training gaps.● Store Complaints: Recorded store complaints emphasized areas for prompt resolution for certain call types.● Resource Allocation Challenges: Potential resource scarcities during peak periods signaled the need for better resource allocation strategies.

Note: Please refer to 'Annexures' for more data analysis on the Pilot

RISKS AND ROADBLOCKS

RISK NO.	DESCRIPTION	OWNER / TEAM	RECOMMENDATION
1	High Call Transfer Rate	Contact Center Management and Project Team	Implement effective call routing and knowledge sharing within the Contact Center to minimize call transfers. Ensure Contact Center Agents are well-trained and equipped to handle a wide range of calls.
2	Service Adequacy	Contact Center Management and Project Team	Continuously monitor and evaluate service levels to ensure stores receive adequate support. Consider adjusting staffing levels or providing additional training as needed.
3	Impact on After-Hours Support	Project Team & After-Hours Support Team	Collaborate with the after-hours support team to renegotiate the contract terms, considering lump-sum agreements instead of call-based structures to ensure the continued provision of service.
4	Resource Scalability	Contact Center Management and Project Team	Establish a clear plan for resource scalability, including hiring additional Contact Center Agents if required, and allocate a budget for this purpose.
5	Ongoing Training	Contact Center Management and Tech Writing Team	Develop a comprehensive training program to keep Contact Center Agents updated with the latest knowledge, call scripts, and technical information.
6	Maintaining Call Resolution Rates	Contact Center Management and Project Team	Implement regular quality assurance checks and feedback mechanisms to ensure consistent and high call resolution rates.
7	Change Management	Project Management Team, Contact Center Team, Store Operations, Store Repair and Fleet Support	Develop a change management strategy to facilitate the transition to the centralized phone number and ensure all stakeholders understand and embrace the new process.

ACTION PLAN FOR PHASE 2 AND PHASE 3

Phase 2 and Phase 3 aims to further implement the centralized phone support system and improve the organization's operational efficiency. (Bolick & Northeastern University, 2019, p.3)

OBJECTIVE	MEASURE(S) of SUCCESS
Increase levels of stores without overloading the Call Agents	Have 100% store participation by August
Utilize lessons learned in Phase 1	Collection of meaningful data from Phase 1 that will help to improve the performance of Phase 2 and Phase 3.
Streamline call process for the store locations	Provide a single contact number for store locations that corresponds to all three support teams
Complete all 1st level support calls with one contact	
Reduce the number of support calls to Store Repair Support, Store Operations Support, and Fleet Support Teams.	Develop knowledge articles and resources for the Contact Center to use for 1st level support
Improve analytics of the Support Teams by letting them concentrate on 2nd level support	New phone programming, store communication and technical support provided for less than \$25,000

PREPARER NAME AND TITLE	PREPARER SIGNATURE	DATE
The American Dream	TAD	March 2023



PROJECT STATUS REPORT II

High Power, Low Interest Stakeholders

PROJECT STATUS REPORT II (Keep Satisfied)

PROJECT NAME	Contact Centre Optimization	PROJECT CODE	PJ002
PROJECT MANAGER	DATE OF STATUS ENTRY	PROJECTED DATE OF COMPLETION	
The American Dream, Billy Caldwell	March 2023	August 2023	
KEY STAKEHOLDERS			
PROJECT TEAM	VP Contact Center - Paulette Larson- Key Sponsor, VP Store Operations -Rickey Spencer, VP Store Repair Support - Francis Scott, VP Fleet Support - Max Fox		
KEY STAKEHOLDERS	Inbound Director - Angela Stevens, Operations Director - Vernon Ortega, Asset Director - Lynn Sparks, Store Repair Director - Janice Freeman, Fleet Asset Director -David Davis. Asset Specialists, Operations Director - Tony Doyle, Fleet Operations Manager - Kim Doyle, Fleet Ops Manager - Lawrence Collier		

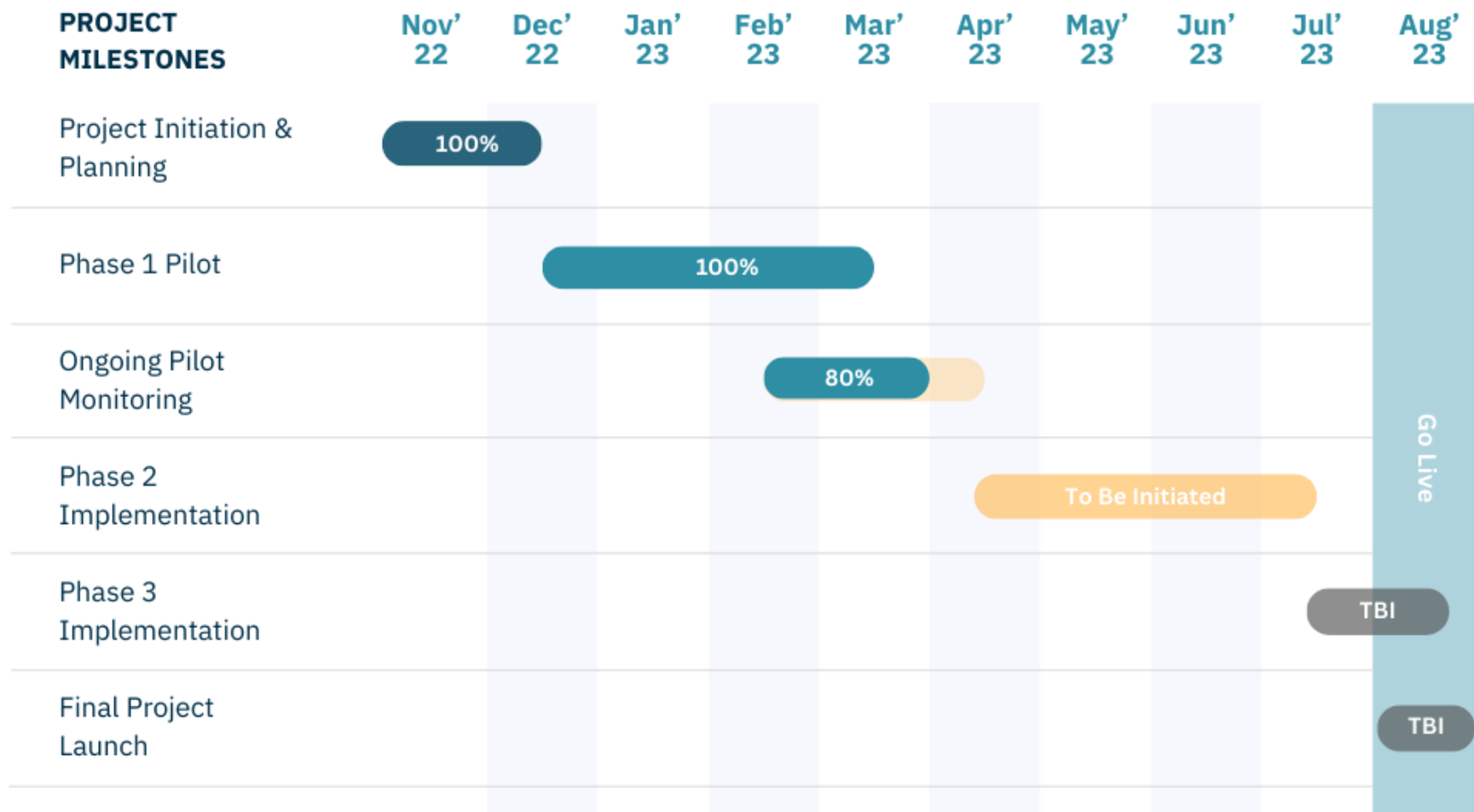
OVERALL PROJECT STATUS

OVERALL PROJECT HEALTH	ON TRACK
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EXECUTIVE SUMMARY

The Contact Centre Optimization project is currently on track. Phase 1 - Pilot is in progress, and key milestones have been successfully achieved. Resourcing and scalability are potential concerns, with recommendations provided to address these issues. The project's scope remains on track, and risks and roadblocks have been identified with corresponding recommendations. The project has made significant achievements in executing the pilot phase. The project timeline is progressing as planned, and it is well-positioned for successful completion in August 2023. (Bolick & Northeastern University, 2019)

PROJECT TIMELINE



PROJECT COMPONENTS

COMPONENT	STATUS	OWNER / TEAM	NOTES
BUDGET	ON BUDGET	Project Sponsors and Project Management Teams	<p>Cost is well-managed, the difference between planned and actual cost is positive.</p> <ul style="list-style-type: none"> The total estimated Phase 1 budget was \$340,000, and as of the status, \$337,000 has been expended.
RESOURCES	POTENTIAL RISKS	Project Management Team, Contact Center Team, Store Operations, Store Repair and Fleet Support	<p>Resourcing could potentially become an issue as the project scales up to include more stores and districts. Recommendations have been made to control the risk of resource scarcity.</p> <ul style="list-style-type: none"> Phase 1 Pilot was implemented with only six Contact Center Agents. Phase 2 may need more than eighteen Contact Center Agents. Additional software licenses will not be available due to funding constraints.
TIMELINE	ON TRACK	Project Management Team, Contact Center Team, Store Operations, Store Repair and Fleet Support	<p>Project is progressing as planned, with the successful completion of the Phase 1 pilot, training, and scheduled progression to subsequent phases, indicating an on-track project timeline.</p>
SCOPE	ON TRACK	Project Sponsors and Project Management Teams	<p>Project's scope, involving the centralization of support calls, is on track, with the successful Phase 1 pilot and planned progression to subsequent phases aligning with the intended scope.</p>

KEY ACCOMPLISHMENTS

ACTION ITEM	STATUS	DATE	OWNER
Successful Pilot Execution	COMPLETE	March 2023	All Project Teams
Categorization of Support Calls	COMPLETE	March 2023	Support Teams
Documentation of Data and Analysis	COMPLETE	March 2023	Project Management Team and Support Teams
Feasibility Assessment	COMPLETE	March 2023	Project Sponsors and Management Teams
Pilot Evaluation	COMPLETE	March 2023	
Project Milestone	COMPLETE	March 2023	All Project Teams

Note: Please refer to 'Annexures' for more data analysis on the Pilot

UPCOMING WORK OF NOTE

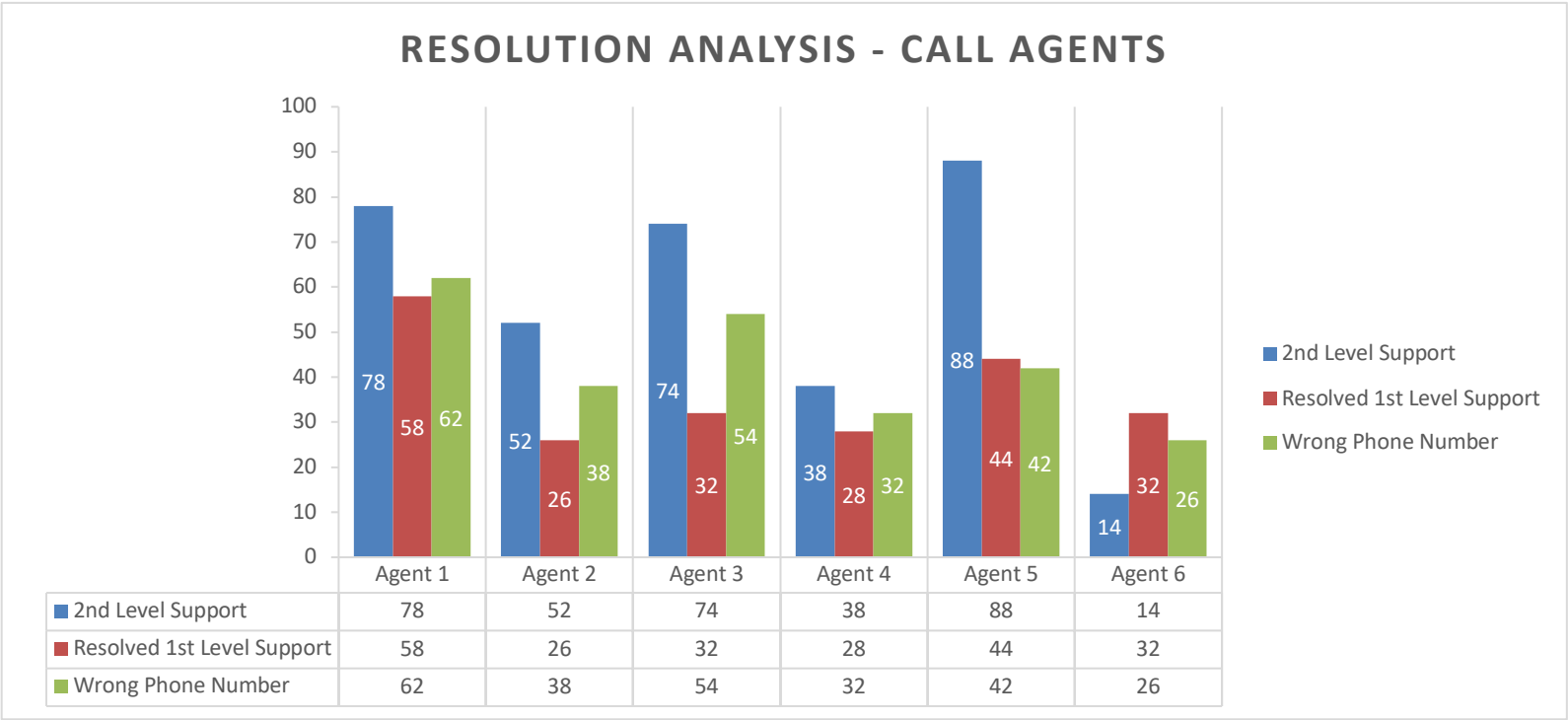
Further implement the centralized phone support system and improve the organization's operational efficiency in Phase 2 and Phase 3. (Bolick & Northeastern University, 2019, p.3)

Phase 2: Select stores in a group of regions to implement the central phone support system.

Phase 3: All stores, districts, regions, and divisions in the United States will be onboarded.

PREPARER NAME AND TITLE	PREPARER SIGNATURE	DATE
The American Dream	TAD	March 2023

Annexure



Types of asset calls broken down by Support group		
Support Team - Asset Type	Count of Resolution	Description
Fleet Support	224	
Forklifts	72	
Store Delivery Vehicles	30	
Trailers	12	
Vendor Inquiry	38	
Wrong Phone Number	72	
Store Operations Support	204	
Irrigation Systems	40	
Parking Lot Sweeping	40	
Snow Removal	12	
Vendor Inquiry	56	
Wrong Phone Number	56	
Store Repair Support	390	
Billing Inquiries	2	
Building Mechanical	116	
Building Structure	4	
Parking Lot	20	
Site Components	58	
Vendor Inquiry	64	
Wrong Phone Number	126	
Grand Total	818	

Number of calls received by each District	
Districts	Store Calls
100	78
200	108
300	86
400	92
500	124
600	272
700	58
Grand Total	818

Number of calls for each Support group answered by the Contact Center	
Support Team	Store Calls
Fleet Support	224
Store Operations Support	204
Store Repair Support	390
Grand Total	818

Number of calls received by each State	
State	Store Calls
NC	38
SC	26
GA	36
KY	20
TN	30
VA	80
MD	22
DE	34
NJ	32
PA	38
CT	8
MA	24
NH	28
VT	58
ME	14
WI	208
IN	64
FL	58
Grand Total	818

Weekly Summary of Calls (Across Regions)

Day	Date	Combined # Calls By Day	Store Repair Support Calls	Store Operations Support Calls	Fleet Support Calls	Contact Center Calls*	After Hours Calls
Monday	2/23	507	293	15	155	28	16
Tuesday	2/24	554	376	13	124	34	7
Wednesday	2/25	533	348	19	111	36	19
Thursday	2/26	544	271	33	190	34	16
Friday	2/27	424	282	12	94	24	12
Saturday	2/28	70				26	44
Sunday	3/1	63				40	23
Totals		2695	1570	92	674	222	137
Monday	3/2	494	288	16	145	30	15
Tuesday	3/3	474	302	7	134	18	13
Wednesday	3/4	403	184	19	161	20	19
Thursday	3/5	449	279	16	89	32	33
Friday	3/6	455	286	12	129	16	12
Saturday	3/7	48				36	12
Sunday	3/8	44				22	22
Totals		2367	1339	70	658	174	126
Monday	3/9	505	274	22	157	28	24
Tuesday	3/10	466	263	11	151	26	15
Wednesday	3/11	448	262	15	139	14	18
Thursday	3/12	396	232	33	111	16	4
Friday	3/13	385	191	6	162	16	10
Saturday	3/14	101				60	41
Sunday	3/15	69				46	23
Totals		2370	1222	87	720	206	135
Monday	3/16	486	278	24	137	28	19
Tuesday	3/17	511	226	15	187	50	33
Wednesday	3/18	421	223	18	136	32	12
Thursday	3/19	438	262	4	138	22	12
Friday	3/20	378	209	10	99	38	22
Saturday	3/21	41				18	23
Sunday	3/22	42				28	14
Totals		2317	1198	71	697	216	135

**Contact Centre Calls include numbers only for Region 1. All other teams are operating business as usual.*

Types of sub-asset calls broken down by asset	
Asset & Sub-Assets	Count of Call Type - Sub-Asset
Billing Inquiries	2
Invoice	2
Building Mechanical	116
Fire System	14
HVAC	78
Lighting	24
Building Structure	4
Floor Slab	2
Walls	2
Forklifts	72
Battery	28
Propane	30
Service	14
Irrigation Systems	40
Greenhouse	18
Landscape	22
Parking Lot	20
Bollards	6
Concrete	14
Parking Lot Sweeping	40
Service Needed	28
Service Past Due	12
Site Components	58
Fences	22
Parking Lot Lights	36
Snow Removal	12
Snow	12
Store Delivery Vehicles	30
Appliance	14
Building Materials	16
Trailers	12
Pallet Trailer	8
Recycling Trailer	4
Vendor Inquiry	158
Technician On Site	88
Work Order Cancelled	30
Work Order Question	40
Wrong Phone Number	254
For Fleet Support	36
For Store Operations Support	46
For Store Repair Support	30
Other	142
Grand Total	818

Conclusion

The project is on schedule in terms of its completion date, scope, and quality. The pilot has been executed successfully, support calls have been categorized effectively, data and analysis have been documented, feasibility has been assessed, and a pilot evaluation has been completed.

A high call transfer rate, adequate service, impact on after-hours support, resource scalability, continuous training, call resolution rates, and change management are just a few of the potential risks and obstacles that have been noted. Implementing efficient call routing, keeping updated on service levels, renegotiating contract terms, planning for resource scalability, creating thorough training programs, establishing quality assurance checks, and supporting a change management strategy are a few recommendations made to reduce these risks.

All things considered, the 'Contact Center project is moving forward effectively, enhancing its solid foundation laid during the pilot phase and concentrating on resolving any obstacles or hazards as it progresses.

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