Operations Scorecard – Team View Enhancement

Business Requirements Document

Version 0.1

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# Document Purpose and Control

To outline the enhancements needing to be made to an existing application that will be updated to consolidate and report performance at a Team level.

## Author

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| Project Title: | **Operations Scorecard** |  |
| Department: | John Hancock Annuity & Fixed Product Operations |  |

# Project Scope

Enhance the Operations Scorecard to utilize the existing reporting functionality in order to show the key performance metrics by each team within the Annuity Administration department.

# Assumptions and Constraints

* The Individual view of the Operations Scorecard has successfully been programmed and UAT completed, or on track to have any outstanding concerns resolved.

# Risk

* Access Controls
  + Levels of access to limit input corruption
  + Permissions for granting access
  + Views only available to those with the proper access level

# Business Requirements

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| **Req #** | **Requirement Description** | **Comment** |
| BR 1 | “Team Scorecard” will be added to the Reporting section of the left hand rail |  |
| BR 1a | “Team Scorecard” will only be viewable by Managers, Team Leaders, and Department Analysts. Access to other users should be restricted such that they cannot access these screens of the Operations Scorecard |  |
| BR 2 | The Reporting -> Team Scorecard lading page will allow users to select the following:   1. Month to be reported 2. Year to be reported 3. Team to be reported | Mirror Individual Scorecard format and functionality |
| BR 2a | The options available in the #3 should be limited to the teams to which the Manger or Team Leader is assigned. The Department Analyst should be able to view all teams. |  |
| BR 3 | The Customize Scorecard section will be updated to include 2 radio buttons:   1. Individual Scorecard 2. Team Scorecard   No other changes will be needed to the existing format of this screen |  |
| BR 3a | Customization made in the Maintenance -> Customize Scorecard screen for the selected Team, Month, and Year should be limited to the type of scorecard selected. No other changes should be made to the format or functionality of this screen. | The team view is a consolidation of the Individual cards and not all the data is needed, please let me know if you think of a simpler solution |
| BR 4 | In addition to the Customized Fields, the Reporting -> Team Scorecard produced should show the following information but limited to the Representatives assigned to the specific team as of the run date of the scorecard:   1. Table of Representatives with a Total row at the bottom that shows per Representative:    1. Name    2. Utilization Score    3. Productivity Score    4. Efficiency Score    5. Quality Score    6. Attendance    7. Total Non-Processing Time    8. Quality Review Rate       1. = Select Count / Total Status Changes 2. A Representatives Required figure    1. = Total Standard Processing Time + Total Non-Processing Time / Total Available Time 3. A Location Summary showing by each location (Cebu, Manilla, Portsmouth, Boston, and Work From Home) the following:    1. Location Name    2. Count of Representatives at Location    3. Percent of all Representatives at Location       1. = Location Representatives / Total Representatives    4. Location Allocation       1. This will show the percentage of staff onshore versus the percentage of staff offshore          1. = (Portsmouth Representatives + Boston Representatives + Work From Home Representatives) / Total Representatives          2. = (Cebu Representatives + Manilla Representatives) / Total Representatives       2. This figure will be formatted as “Onshore - Offshore” (ex. 10% - 90%) 4. A Completed Units table showing the following:    1. Completed Unit Name    2. Completed Unit Count    3. Count of status changes needed to get to a Completed Unit |  |
| BR 4a | The Maintenance -> Teams -> Work Items (Timings) screen will be updated with the ability to mark a Worktype & Status combination as counting towards a Completed Unit that will appear on #4 |  |
| BR 5 | An Outstanding Inventory table counting the number of items that appear on the TA Report for the reported time with the Team’s Group name |  |
| BR 6 | The Team Utilization should also be shown in a bar chart with a goal represented by a line at xx.xx% |  |
| BR 7 | The Team Productivity should also be shown in a bar chart with a goal represented by a line at xx.xx% |  |
| BR 8 | The Team Efficiency should also be shown in a bar chart with a goal represented by a line at xx.xx% |  |
| BR 9 | The Team Quality should also be shown in a bar chart with a goal represented by a line at xx.xx% |  |
| BR 10 | The Team Non-Processing Time should also be shown as a pie chart broken down by each category of Non-Processing Time |  |
| BR 11 | The Team Standard Processing Time, Non-Processing Time, Phone Time, and “Dead” Time should be shown in a pie chart   1. Standard Processing Time = sum of all Representatives’ Standard Processing Time 2. Non-Processing Time = sum of all Representatives’ Non-Processing Time 3. Phone Time = sum of all Representatives’ Total Talk Time 4. “Dead” Time = Total Available Time – (Standard Processing Time + Non-Processing Time + Phone Time) |  |
| BR 12 | The Team should be given a Rank amongst the other teams within the Annuity Administration   1. The Rank should be based on the total combined score of Utilization, Productivity, Efficiency, and Quality    1. Ex. If …   Utilization = 90%  Productivity = 85%  Efficiency = 90%  Quality = 100%  The combined score would be 90 + 85 + 90 + 100 = 365  And the 365 would then be ranked with the scores of the other teams. | Most likely the differences between teams will be only percentage points and I’d like to validate this a bit so that it’s fair as some teams have more production staff than others |
| BR 13 | A Team Health score and screen background color should be provided based on the following ranges:   1. Good    1. Combined Utilization, Productivity, Efficiency, and Quality score calculated as in BR 12 is greater than or equal to 370    2. Background screen should be Green or trimmed in Green 2. Average    1. Combined Utilization, Productivity, Efficiency, and Quality score is greater than or equal to 340 and less than 370    2. Background screen should be Yellow or trimmed in Yellow 3. Poor    1. Combined Utilization, Productivity, Efficiency, and Quality score is less than 340    2. Background screen should be Red or trimmed in Red |  |
| BR 14 | The Team Scorecard should be exportable to a Microsoft application or as a PDF. |  |
| BR 15 | A monthly Team Quality Report should be built for each team that can be printed to PDF and includes 8 separate pages:   1. Cover Page 2. Table of Contents 3. Individual Quality 4. Team Summary 5. Worktype 6. Status 7. Manager Sign Off 8. Appendix | This might require a re-design of the Individual Scorecard Quality report function so that a single report can be used for both the Individual Report & Team Reports |
| BR 15a | The Cover Page should include:   * Title of “Individual Quality Ratings” * Month and Year “Quality Report” where the Month and Year change depending on user selection similar to running an Individual Scorecard * Image block where the image doesn’t change but the Month and Year change based on user selection * Company logo block below the image that doesn’t change |  |
| BR 15b | The Table of Contents should include:   * Individual Quality Numbers …3 * Team YTD Summary …4 * Worktype Summary …5 * Detailed Worktype Summary …6 * Manager Sign Off …7 * Appendix …8 |  |
| BR 15c | The Individual Quality Numbers should include:   * Table with heading “Individual Quality Ratings” * Sub heading of Month and Year “Quality Report” where Month and Year are selected by the user when the report is generated * Headings   + “User ID” where each user for the specific team is listed and the User Id is the Representative’s AWD ID limited to roles other than Analysts   + “Status Count” where the data is pulled from the BI Quality report for the representative and limited to the Worktype & Statuses that are being reported on the Individual Scorecard   + “Select Count” where the data is pulled from the BI Quality report for the representative and limited to the Worktype & Statuses that are being reported on the Individual Scorecard   + “Review Count” where the data is pulled from the BI Quality report for the representative and limited to the Worktype & Statuses that are being reported on the Individual Scorecard   + “Fail Count” where the data is pulled from the BI Quality report for the representative and limited to the Worktype & Statuses that are being reported on the Individual Scorecard   + “Quality Rating” which is reported as a percentage and is a calculated field using the formula:     - 1 – (Fail Count / Review Count)   + “Quality Goal” which is a manager defined field applicable to the entire team and reported as a percentage * A note should be added that “Quality Analysts are not included” * The information presented in this table should also be presented in a graph or chart showing each representatives quality rating compared against the team goal * A “Manager Comments” box should be included where a manager can add text each month |  |
| BR 15d | The Team Summary should include:   * A heading of “Team Quality Summary” * A sub heading of Month and Year “Quality Report” where the Month and Year vary based on manager selected * “Date” which shows each of the 12 months prior to the month and year selected * “Quality Rating” which shows the quality rating for the month and year selected and each of the 12 months prior to that period * “Quality Goal” which shows the quality goal for the month and year selected and each of the 12 months prior to that period * The table above should also be represented as a graph or chart showing each month compared against the goal for that period * A “Manager Comments” box should be included where a manger can add text each month |  |
| BR 15e | The Worktype should show:   * Header of “Worktype Quality Summary” * Sub heading of Month and Year and “Quality Report” where Month and Year vary depending on the manager’s selection * “Worktype” which shows:   + “Total Items Processed” where the data is pulled from the BI Quality report and limited to the team’s representatives and worktype in the column header   + “Total Items Selected” where the data is pulled from the BI Quality report and limited to the team’s representatives and worktype in the column header   + “% Selected for QC” which is a calculated field using the formula:     - Total Items Selected / Total Items Processed   + “Total Items Reviewed” where the data is pulled from the BI Quality report and limited to the team’s representatives and worktype in the column header   + “% Selected QC’d” which is a calculated field using the formula:     - Total Items Reviewed / Total Items Selected   + “% Total QC’d” which is a calculated field using the formula:     - Total Items Reviewed / Total Items Processed * Subsequent columns for each of the worktypes that the team reports on the Individual Scorecard * A “Total” that sums all the “Worktype” heading rows for each of the worktypes shown * The table above should also be represented in a chart or graph * A “Manager Comments” box should be included where a manger can add text each month |  |
| BR 15f | The Status should show:   * Header “Status Quality Summary” * A sub heading of Month and Year “Quality Report” where Month and Year vary by report period selected * “Worktype” * “Status” * The Worktype and Status list should show a list of all unique Worktype & Status combinations that the team reports on their Individual Scorecard * “QC Parameter” which shows “User Experience Level” for each combination but can be edited by the user * “Completed Count” which is pulled from the BI Quality report for the specific Worktype & Status combination and limited to the representatives under the Team * “Selected Count” which is pulled from the BI Quality report for the specific Worktype & Status combination and limited to the representatives under the Team * “Reviewed Count” which is pulled from the BI Quality report from the specific Worktype & Status combination and limited to the representatives under the Team * “Reviewed %” which is a calculated field using the formula:   + Reviewed Count / Completed Count   + If Completed Count = 0, “N/A” should be shown * “Comments” which will be a user entry field for text * A “Manager Comments” box should be included where a manger can add text each month |  |
| BR 15g | The Manager Sign Off should include a box where a manager can add text each month, add their signature, and date of signature |  |
| BR 15h | The Appendix should show:   * “Definitions & Descriptions” where the users can define the fields within each report as well the explain the worktypes referenced within the Quality Report |  |

1. **Reporting Requirements**

* Dashboards to run based on a date range on demand.
* Dashboards to be exported or printed based on format of choice.
  + Microsoft Excel
  + Adobe PDF

1. **Technical Requirements**

* Each Manager, Team Leader, and Department Analyst will have a shortcut link on their Desktop as a portal to this Database

1. **Open Issues**
2. **Glossary**
3. **Appendix**