

# PROJECT PLANNING PHASE

Date	02NOV 2025
TeamID	NM2025TMID06943
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 ensures that the automation and intelligence objectives are translated into well-defined tasks, measurable outcomes, and accountable ownership.

## Key Activities

### 1. Scope Definition:

Determine the boundaries of the assignment solution (e.g., whether it includes chat-based tickets or only email incidents).

### 2. KPI Establishment:

Define measurable success criteria, such as:

- Target **Mean Time to Resolution (MTTR)** reduction
- Target **Re-assignment Rate** reduction
- Target **Assignment Accuracy Rate** (for Predictive Intelligence model)

### 3. Work Breakdown Structure (WBS):

Break down high-impact initiatives — such as **skill-based routing**, **automated triage rules**, and **predictive assignment** — into discrete, manageable tasks.

Each task includes:

- **Owner**
- **Resources** (tools, budget, personnel)
- **Timeline**
- **Dependencies**

### 4. Risk Management Plan:

Identify potential risks (e.g., poor data quality in agent skill profiles, resistance to workflow changes) and define mitigation strategies.

### 5. Final Output:

A comprehensive **Project Charter/Execution Plan** that aligns all stakeholders on:

- Budget and resources
- Timeline and milestones
- Desired outcomes
- Governance and escalation structure

## Agile Delivery Framework

The project follows an **Agile methodology**, using **two-week sprints** and a **prioritized product backlog**.

This approach allows for iterative delivery, testing, and refinement of automation features.

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## Product Backlog (Prioritized Features)

The **Product Backlog** serves as the **master list of all required functionalities**, prioritized by business value and impact.

PBI ID	Feature / Epic	Goal
PBI-001	Predictive Group Assignment (AI/ML)	Automate group routing using machine learning
PBI-002	Rule-based Fallback and Notifications	Provide fallback routing and alert mechanisms
PBI-003	Agent-Level Load Balancing	Optimize workload distribution via AWA
PBI-004	Skill Definitions and Mapping	Enable skill-based assignment
PBI-005	Notifications and Escalations	Ensure timely communication on assignments
PBI-006	Performance Analytics Dashboard	Monitor key performance metrics

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## Sprint Planning

### Sprint 1: Foundation & Predictive Group Assignment

- Duration:** 2 Weeks
- Focus:** Reliable automatic **group routing**
- Goal:** Achieve consistent and accurate Assignment Group prediction using Predictive Intelligence.

Story ID	Description (Based on PBI)	Story Points
S1-1	PI Model Setup & Training: Configure the PI Classification Solution, ingest historical incident data, and train the initial model.	8
S1-2	Basic Rules Configuration: Implement foundational assignment rules based on Service and CI.	5
S1-3	Predictive Group Integration: Integrate the trained PI model into Flow Designer/Business Rule for automatic group assignment.	5
S1-4	Fallback Group Logic: Define logic to route tickets to fallback/manager group if model confidence is low.	3
S1-5	Agent Notification: Configure notifications to assigned groups on ticket creation.	2

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## Sprint 2: Agent-Level Load Balancing & Metrics

- Duration:** 2 Weeks
- Focus:** Efficient **individual assignment** and metrics tracking.
- Goal:** Implement capacity-based routing and establish assignment performance metrics.

Story ID	Description (Based on PBI)	Story Points
S2-1	AWA Capacity Setup: Configure Advanced Work Assignment (AWA) to track agent capacity and status.	8
S2-2	AWA Load Balancing: Implement Round Robin or Least Busy assignment logic within AWA.	5
S2-3	Skill Definitions & Mapping: Define core skill sets (e.g., Linux, SAP) and assign to relevant agents.	5
S2-4	Initial PA Dashboard: Build dashboard tracking MTTA and Reassignment Counts.	5
S2-5	Agent/User Notifications: Finalize customized notifications for agents and callers.	3

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### User Stories and Acceptance Criteria (Examples)

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

User Story	Acceptance Criteria (Definition of Done)	Story Points
<b>S1-1: PI Model Setup &amp; Training</b>	1. PI Classification Solution is configured for the <i>Incident</i> table. 2. ≥5,000 historical closed incidents used for training. 3. Initial model precision ≥80% for top 3 groups.	8
<b>S1-3: Predictive Group Integration</b>	1. Flow Designer runs on new <i>Incident</i> records. 2. Successfully calls PI model for predictions. 3. Auto-sets <i>Assignment Group</i> when confidence ≥70%. 4. Activity Stream logs source as "Predictive Intelligence".	5

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

User Story	Acceptance Criteria (Definition of Done)	Story Points
<b>S2-1: AWA Capacity Setup</b>	1. AWA plugin is active. 2. Capacity Rule limits P3 queue agents to max 7 active tasks. 3. Agents can manually set availability (Available/Busy/Offline) in Agent Workspace.	8
<b>S2-2: AWA Load Balancing</b>	1. For tickets already assigned to a Group, AWA selects the best agent. 2. Logic uses least load or Round Robin if loads equal. 3. If no agent is available, ticket remains unassigned and Group Manager is notified.	5

