**Business Requirements Document (BRD)**  
**Project Title:**  
**Activity-wise Schedule Adherence raw extract via Smart Sync Tool**  
**Version:** 0.1  
**Date:** 19 May 2025

**Table of Contents**

1. Executive Summary / Purpose
2. Business Objectives & Success Criteria
3. Background & Current State
4. Project Scope
5. Data Requirements & Definitions
6. Benefits
7. Assumptions
8. Risks & Mitigations
9. Dependencies
10. Acceptance Criteria

**1. Executive Summary / Purpose**

The goal of this project is to automate the extraction and reporting of **Schedule Adherence Percentage by activity type** (e.g., Break, Lunch, Meeting, Wrap-Up) from the existing Smart Sync tool. The output will be used by the WFM portal to generate dashboards and operational reports, enabling near real-time insights for improved staffing decisions, performance management, and coaching.

**2. Business Objectives & Success Criteria**

| **ID** | **Objective** |
| --- | --- |
| OBJ1 | Provide supervisors with activity-level adherence insights |
| OBJ2 | Improve overall schedule adherence metrics |
| OBJ3 | Eliminate manual effort in report generation |
| OBJ4 | Enable data-driven, timely coaching and intervention |

**3. Background & Current State**

Currently, adherence analysis involves exporting raw logs into Excel, followed by manual pivoting and filtering. This process is time-consuming, error-prone, and lacks real-time responsiveness, delaying operational decisions and corrective actions.

**4. Project Scope**

**4.1 In-Scope**

* Automated extraction of schedule vs. actual activity timestamps for all frontline agents.
* Calculation of **Schedule Adherence % per activity** using predefined logic.
* Output data to be saved as .csv files on a shared drive.
* Support for currently active programs available in Smart Sync.
* Dynamic handling of MUID changes (additions or deletions should reflect automatically in the extract).

**4.2 Out-of-Scope**

* Modifications to existing scheduling or shift policies.
* Development of visualization components (to be handled by the WFM portal).

**5. Data Requirements & Definitions**

Expected fields in the extracted dataset:

date | period | TZ | custID | muID | tvID | acdID | logonID | ssn | agentName |

modify | attribute | totalAct | totalInAdh | totalOutAdh | totalSched | adhPct | externalID

**6. Benefits**

* **Operational Efficiency**: Eliminates the need for manual Excel-based reporting.
* **Adherence issues**: Allows supervisors to act on adherence issues mid-shift.
* **Granular Analysis**: Enables root cause identification at the activity level (e.g., extended Lunch or Wrap-Up).
* **SLA Compliance**: Enhances accuracy in adherence tracking for client SLA reporting.
* **Employee Engagement**: Promotes transparency and fairness in performance feedback.

**7. Assumptions**

* Activity codes and mappings are maintained and updated regularly by the WFM team.
* Smart Sync will continue to provide accurate and timely data inputs.
* File sharing permissions for shared drive locations are properly configured.

**8. Risks & Mitigations**

| **Risk** | **Mitigation** |
| --- | --- |
| Inaccurate or missing data from Smart Sync tool | Implement alerting/validation for data integrity |
| Delay in MUID updates leading to incomplete reports | Automate MUID mapping refresh before each extraction |
| Shared drive access issues or disk space limitations | Coordinate with IT to ensure availability and access |

**9. Dependencies**

* Availability and stability of Smart Sync tool for data extraction.
* WFM portal to consume and visualize the generated .csv files.
* IT support for shared drive management and automation scheduling.

**10. Acceptance Criteria**

* Extracted data must be saved in .csv format on a predefined shared drive path.
* Data should be accurate, complete, and refreshed at scheduled intervals (e.g., daily).
* The solution must handle all current and newly added MUIDs automatically.
* The adherence % per activity should match the manual calculation logic used by WFM.