CBSA - ASFC - Strategic Roadmap

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# Executive Summary

The following Enterprise Architecture Roadmap, **EAR** is a strategic blueprint meant to convey and communicate:

* a guide for implementing a *digital transformation* of the Call Centres, with the goals to;
  + improve the ***Customer Experience***
  + align the various Call Centre Lines of Business
  + enhance the reporting across the Enterprise
* a change management plan to move the company towards;
  + new tools, products and technologies
    - GCCase and Amazon Connect

TODO: ***best way to refer to the Call Centres***

# Purpose

The **EAR** is an *essential* planning tool for the CIO, the Enterprise Architects, IT Management from different Lines of Business to *visualize* the broader needs and *goals*.

The **EAR** assists with this *visual roadmap* as opposed to just a tactical outline of activities required in several ways:

* Stakeholders Buy-In
  + Clearly show the *Big Picture*.
  + Conveys how will this transformation improve the *Customer Experience*.
  + Depicts how productivity will improve.
  + Shows how this can be achieved and lower operational costs.
* Sharing Details
  + Provides multiple views from different perspectives for a variety of audiences.
    - High-Level views for the strategic thinkers.
    - Detailed-Level views for the tactical implementers.
  + Provides timelines of the transformation.
  + Outlines the estimated resources requirements and anticipated budgets.
  + Clarifies the *interdependencies* with other systems.
* Prioritize Activities
  + Assists with planning and adapting to unexpected changes.
  + The **EAR** provides the strategic reference point that remains constant.
  + The main objectives remain clear.

# Outline

THe following roadmap presents a summary view of the current state of the CBSA Call Centres operations. The current state is purposely viewed from a high-level and technological details are *not* discussed except where some context may be valuable.

The following comprise the main sections of the roadmap:

* Current State
  + where are we *today*?
* Desired State
  + where do we want to be in the *future*?
* Gap Analysis
  + What are the items preventing the transformation?
* Prioritization Analysis
  + What do we need to do to complete the transformation?
* Optimization Analysis
  + What is the best sequence to follow?

![Roadmap Process](data:image/png;base64;base64,)

Roadmap Process

## Current State

CBSA operates a number of different **Call Centres** using a variety of tools and differing processes across the ***Lines of Business*** (\*LOB\*s). The tools used are older, not tailored or necessarily suited to Call Centre operations, e.g. JIRA. The intake processes across the \*LOB\*s are also different. Email requests are manually processed and tracked. Service tickets created via follow up phone calls may or may not be associated to the same service request previously opened via the email request.

The \*LOB\*s each operate as classic silos, total isolated from one another. This *compartmentalization* offers advantages:

* application failures are limited to a single **LOB**
* customizations of the business processes, the look and feel and general operations can be completely tailored to the **LOB**.

![Silo Architecture](data:image/png;base64;base64,)

Silo Architecture

These *advantages* however, limiting and *inefficient* when viewed from an Enterprise perspective. The advantages listed above result in:

* limiting, or seriously restricting, the ability to report on the Enterprise as a whole
* isolating the applications' data makes it prone to duplication and replication across \*LOB\*s
* differing and customized business processes across **LOB** may seem advantageous, but they in fact:
  + increases training requirements
  + increase the overall number of operations performed across **LOB**, e.g. each **LOB** may have different ways to create an account or contact.
* standard maintenance procedures such as backups, regular maintenance, security updates, etc. must be performed for *each* **LOB**.

### Service Level Agreements (SLA)

Service Level Agreements (SLAs) at the CBSA Call Centres currently are not tracked and determining the adherence to the stated SLAs is difficult to quantify. For the same reasons described above, tracking SLAs for the individual **LOB** and at the Enterprise level is challenging.

### Knowledge Management

Knowledge Management is inconsistent across the **LOB** and call centre operators can not reliably locate and identify the required resources for common requests.

### Self-Help, Chatbots and Automation

The use of automated processes via Chatbots, self-help resources and intelligent routing are not used to the extent that is possible.

TODO: diagrams and input here from the IMB presentation

## Desired State

Similar to planning a trip, where knowledge of the destination is critical, the *Desired State* is a place where we can:

* Track customer issues through cases;
  + Cases, incidents, tickets, service tickets, etc. all refer to the customer issue being tracked.
* Record all interactions related to a case;
  + Emails, Phone calls, …​ *the activities*;
  + Self-service options for the client via a portal, chatbot
* Share information in the knowledge base;
* Create queues and route cases to the right channels;
* Create and track service levels through service-level agreements (SLAs);
* Define service terms through entitlements;
* Manage performance and productivity through reports and dashboards;
* Create and schedule services;
* Participate in chats;
* Manage conversations across channels.

![Client Experience](data:image/png;base64;base64,)

Client Experience

### Isolation, Yet Cooperation

The desired state should allow the **LOB** the ability to:

* operate independently;
* manage the business process for the **LOB**;
* selectively share, *as-required* common data elements, e.g. contacts, accounts;
* control access to the **LOB**;

In other words, the **LOB** can operate as independent applications that are part of a common collective. The desired state requirements listed above, without being specific, provide the a superset of the required features.

### Advantages

The desired state architecture provides a number of advantage:

* Improved *Customer Experience*.
* Remove barries to access of data.
  + One common data layer is effectively and efficiently shared.
* Eliminate data redundancy.
* Improved understanding of the data is readily available.
* Improved harmonization and analytics.
* Increased compatibility and collaboration across LOBs, *where appropriate*.
* Improvedand more consistened business processes.
* Higher accuracy of data.

![Business Units](data:image/png;base64;base64,)

Business Units

![Desired State](data:image/png;base64;base64,)

Desired State

### Dynamics 365

### Amazon Connect

## Gap Analysis

## Prioritize Activities

## Determine Sequence