

eCoaching Log Redesign Phase 2

May 20, 2014

# Introduction

The eCoaching log (eCL) project plan will provide a high-level overview of the project and will serve as the formal document used to execute the requirements of the eCL application and input from the project stakeholders. The project plan will document our approach and methodology used by the eCL Engineering team.

The eCL is designed to provide feedback to CSRs of the Contact Center Operations (CCO), including alternate channels (e.g. Web Chat, ARC, Written Correspondence). The eCL builds on our goal of continuous improvement to achieve sustainable results.

The redesign aims to launch a modular coaching platform that will contain the performance metrics of various roles. The redesign is intended to provide users the flexibility of selecting different coaching platforms appropriate for the role requiring coaching.

The phase also intends to roll out a redesigned performance dashboard. The dashboard provides a quick view of coaching data, enabling users to address actual performance items.

Supervisors and Managers submit eCLs for a CSR to correct unfavorable behavior. They submit eCLs through a front-end Internet application which gets delivered to the CSRs manager for coaching. Depending on the type of coaching required, both Supervisor and Manager could be required to review and sign-off.

# Stakeholder Descriptions

## Stakeholder Summary

| **Name** | **Description** | **Responsibilities** |
| --- | --- | --- |
| Scott Mainwaring and Lori Lindstrom | CCO Vice Presidents | Overall project sponsor. Provide financial and project approval. |
| Brian Dye | Director of Quality | Project Sponsor. |
| John Tiongson | Project (Program) Manager | Provide coordination, communication and direction between engineering and the Program team. |
| Tim Queen | Project (Software) Manager | * Develops and updates the project plan * Ensures the software development is completed on time and within budget, and serves as contact between project staff and development resources. * Responsible for Risk Management and Measurement and Analysis including monthly reporting to senior management and program manager. * Responsible for production status and issues * Responsible for directing development resources to ensure a quality product from development to production support. * Responsible for coordinating the effort between development, testing and business analysts * Responsible for formal decision making (DAR) * Responsible for project management (MA) |
| Testers   * Doug Stearns | Requirements and testing engineers | * Creation of requirements * Creation of Use Cases * Creation of Test plans * Creation of Test Cases * Updating of Trace Matrix * Performing System Testing |
| SCM Lead   * Jackie Miller | Configuration Management | * Leads all SCR activity * Creates and maintains SCCB Charter * The SCM lead is a member of the SCCB * Facilitates the SCCB meetings * Generates the SCCB meeting minutes * Provides SCM tool training and support |
| Process Auditor | Governance | * Provides governance oversight * Performs audits |
| Development Team | Developers | * Create architecture * Create High Level and Detail Designs * Write code * Unit Test code |

# Product Overview

## High Level Requirements

| **Need** | **Priority** | **Features/Benefit** | **Attributes** | **Planned Release** |
| --- | --- | --- | --- | --- |
| Modular Coaching Platform - Supervisor | Quality: Create a coaching module template that is re-usable and customizable. | Phase 2 #1 | A modular approach will enable the eCL project team to maintain a re-usable 'out-of-the-box' coaching template form. This coaching template is then customized based on the required Key Performance Indicators of a specific role. |  | 1 |
| Dashboard Enhancement: Modify the existing dashboard to include a graphical layout based on a top-down hierarchy. | Phase 2 #2 | Simple, intuitive dashboarding enables users to make decisions real-time based on coaching data that can be easily interpreted and viewed. |  | 2 |
| Analysis Cube(s): Create a set of related measures and dimensions for eCL self-service business intelligence dashboards. | Phase 3 #1 | Will provide multi-dimensional eCL data analysis through self-service business intelligence tools. |  | 3 |
| Reporting Enhancement: Improve the Historical Reporting module to include predefined queries, customer filters and exportable data. | Phase 3 #2 | Utilizing the Reporting Services of SQL server, users can extract and manage coaching data based on predefined or custom filters. |  | 4 |
| Modular Coaching Platform - Training | Other functional area: Create a coaching module template that is re-usable and customizable | Phase 3 #3 | A modular approach will enable the eCL project team to maintain a re-usable 'out-of-the-box' coaching template form. This coaching template is then customized based on the required Key Performance Indicators of a specific role. |  | 5 |
| Close-out Process and Policy (Active/Inactive): Process and SOP around how and when an eCL record becomes inactive, removed or modified. Includes a field in the table and form for notes the eCL admins can add. |  | Ensures that eCLs that are contested, deleted, or needing modified are thoroughly vetted and through clear guidance.  Filters out inactive employees from dashboards and reporting but still available to pull information for rehires. |  | TBD |
| Integration of eCL Dashboard with CSR Performance Scorecard |  | Provides a single location for all coaching and performance of a CSR, Supervisor Team or Manager Team. |  | TBD |
| Administrative Backend: Portal for eCL administrators to make updates to individual eCL records, form fields and other miscellaneous tasked identified during requirements gathering. |  | Provides extra support to handle support requests regarding individual eCL records and updates for form options. |  | TBD |

## Other Product Requirements

|  |  |  |
| --- | --- | --- |
| **Requirement** | **Priority** | **Planned Release** |
| HCSD APL required documentation and processes | 1 | 1 |
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# System Interfaces and Business Boundaries

This is an internal web based system that is used exclusively by CCO Operations. In addition to input through the web, data is provided from the following:

* Aspect
* National Data Warehouse (NDW)
* Verint through the Interface to Quality Systems interface
* PeopleSoft

The system uses data from Active Directory to enforce Role Based Access Controls (RBAC).

# Key Assumptions

* Will be built upon the existing system infrastructure
* …
* …