

eCoaching Log Vision

May 22, 2015

# Introduction

The eCoaching Log (eCL) is designed to provide feedback to CSRs, supervisors, quality specialists and LSAs 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 identification of reinforcement and coaching needs come from the Verint scorecards, observations, ETS, OMRs and Warnings.

The eCL has gone through numerous changes since its inception. The eCoaching Log (eCL) was rolled out to all CCO contact centers by the end of January 2012. By the end of June 2012, the tool had been migrated from SharePoint to SQL Server (with a .net user interface), and a Verint feed established to ensure coaching notes in Verint were automatically sent to the eCL, avoiding manual entry of that information. In 2013 the team began work on enhancements to the eCL. In 2013, we rolled out the Outlier Management Report, and in early 2014 the Database Normalization/Redesign phase was completed. Also in 2014 a new version of Verint was implemented for the CCO and was integrated into the eCL.

Phase 1: The two problems addressed during this phase of the project included creation of an outlier report to easily identify correctable issues regarding eCL reporting, and the redesign of the database to provide a better foundation for gathering the type of data needed for improved business intelligence. This phase is complete.  Phase 2: During this phase, we expanded the uses of the eCL beyond CSR coaching notes to allow collection of records for other operational staff. This included a modular coaching platform that fully adapts coaching metrics for supervisors, quality specialists and LSAs. Also during this phase, the project will implement a feed from the ETS timekeeping system and include warning notices for CSRs and supervisors so that these items are tracked with other coaching notes. This phase is complete. Phase 3: During this phase of the eCL project, we will expand the eCL for use as a coaching notes repository for trainers. Additionally, this phase will create a simplified and more intuitive dashboard to address user requirements and will permit data extraction by users. It will also address the time spent by the project team on inactivation of CSRs and reassignment of review permissions to supervisors and managers when the assigned supervisor or manager is not available.

# 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 |
| * Lili Huang * Suzy Palacherla | 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
* ETS

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

# Key Assumptions

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