# Call Center Reporting Meeting

## Date: January 15, 2013

## Time: 10:00am – 12:00pm

## Location: Southfield, Randall’s Office (Austin)

Participants: 🗹 If participant attended 🞎 if participant did not attend

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| ☑ Randall Riefel | ☑ Ann Russo | ☑ Oana Cheta |  |
| ☑ Steve Duffy | ☑ Alton Martin (SPOT) | ☑ Roger Meador (SPOT) |  |

Topics of Discussion

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| 1. The primary purpose of the meeting was to review artifacts presented by SPOT that represented deliverables from the call center reporting effort. This list of artifacts was not compared with any documented contractual SOW. Artifacts were reviewed as published to vignette (in the “Reports” folder) at the at the following location: <https://maxcs.maxinc.com/gm/folder1.11.527779>   **Table of Artifacts Reviewed**   |  |  |  |  | | --- | --- | --- | --- | | Artifact | Purpose (as indicated by SPOT) | MAXIMUS Comments | Status / Next Steps | | **Data Dictionary** | Provide a “metrics” glossary of call center terms and definitions. | Generally a list of standard COPC terms. It is not intended to be project (Texas) specific; however some metrics specific to Texas are included. | Accepted | | **Reporting Service Matrix** | Recommended metrics for efficiency/productivity, quality, and responsiveness that *should* be monitored organized by job function as recommended by SPOT | Not all metrics listed in data dictionary map to who should be the intended recipient job class. | All metrics should be mapped to recommended job class or indicate purpose of metric if not consumed by a job class. | | **Metrics, targets and Goals** | List of current targets for Texas call center metrics. Metrics are mapped to the to the “reporting service matrix. | List of values provided to SPOT by MAXIMUS. Does not make recommendations on adjusting or revising targets. | Accepted  (Assumes any deliverable on recommended target values not included in reporting effort). | | **Example Reports** | Provide example report layouts. These example reports were not intended to represent formal and complete recommendations for standardized call center dashboards and / or reports. | Example reports are represented in a spreadsheet. They cover agent productivity and efficiency only. Considerable effort remains to define and design standardized dashboards, reporting, and alerts. | Determine if development if standardized dashboards and reports design was part of SOW. Provide more complete report layouts that represent the recommended standardized reporting suite by job class. | | **Business Requirements Document (BRD)** | Provide requirements to initiate a pilot for agent performance reporting implementation. Work on data mapping consumed the majority of time in the overall reporting effort and was viewed as the “prime deliverable”. | Document is incomplete. Hence the majority of work done by SPOT in the reporting area is currently un documented. Most critical is the lack of documented mapping of data sources. Also incomplete is the data model partially developed by SPOT. | Complete BRD. ***Particularly critical*** is to provide documented source - > target mapping. This requires full documentation of how data is mapped from the TX infrastructure source to the (partial completed) data model in the BRD. | |  |
| **Action Items:**   1. SPOT agreed to complete BRD including mapping of all source - > target data elements in proposed data model*. This is the most critical “gap” in the deliverables reviewed and is essential to have SPOT fully complete.* Expected delivery 25 January 2013 2. Randall to discuss with Leslie the MAXIMUS understanding of SOW and deliverables. Most important is to determine what level of “standardized reporting” design was agreed to (SPOT assumes the examples provided are sufficient under the SOW agreements). This is the second most critical “gap” and represents a significant level of effort beyond the examples provided. |  |