Statement of Work

**Introduction**

Previous work with Spot Consulting LLC (SPOT) resulted in the production of the artifacts described in Table 1 below. This deliverables were in support of defining agent productivity reporting.

|  |  |
| --- | --- |
| Artifact | Definition / Purpose |
| **Data Dictionary** | A “metrics” glossary of call center terms and definitions. |
| **Reporting Service Matrix** | Recommended metrics for efficiency/productivity, quality, and responsiveness that *should* be monitored organized by job function. |
| **Metrics, targets and Goals** | List of current targets for Texas call center mapped to the to the “reporting service matrix. |
| **Example Reports** | Example report layouts. Note: These example reports were not intended to represent formal and complete recommendations for standardized call center dashboards and / or reports. |
| **Business Requirements Document (BRD)** | Requirements to initiate a pilot for agent performance reporting implementation. Includes definition for data mapping for HDS, ITG, and Impact360 to a proposed target data structure. |

***Table 1:*** *List of relevant artifacts supporting Agent Productivity Reporting*

In order to implement standardized agent productivity reporting detailed analysis specifications (reports, dashboards and alerts) need to be developed. The deliverables of this work will allow MAXIMUS to

1. Provide documentation to all levels of staff (includes executive management) on standardized call center agent productivity reports including how they fulfill significant elements of the full suite of contact center reports.
2. Develop training on effective use of agent productivity reports.
3. Develop standardized reports, dashboards, alerts and other analysis objects in the MAXDat architecture for all levels of stakeholders.
4. Support integration of agent productivity reporting into the MAXDat business intelligence solution.

**Scope**

SPOT consulting will provide the services necessary to produce the deliverables as described in this Statement of Work (SoW). Work must be logically consistent with the deliverables previously produced (listed in Table 1). If necessary the artifacts listed in Table 1 may need updating to remain consistent with the work described here. Report specifications developed must be consistent with the MicroStrategies Business Intelligence suite used by MAXDat.

SPOT will work closely with MAXIMUS BPM staff in the production of the deliverables.

**Deliverables and Objectives**

The primary objective of the work defined in this SoW is to sufficiently design and specific a suite of agent productivity Business Intelligence Objects (BIO) (reports, dashboards, and alerts) that provide actionable information to each of the various contact center stakeholders, including executive management. These BIOs must allow for the like-to -like comparison of agent productivity across programs and projects. This will

The following deliverables will be produced by SPOT. They are expected to be provided in the order outlined below. Review of each deliverable by SPOT and MAXIMUS will likely inform the production of the next deliverable.

1. Define at a high – level the overall call center reporting needs (not just agent productivity reporting) including the probable sources of reports and data for each category reporting need. This will define the scope of contact center reporting requirements. Presentation format will most likely be PowerPoint.
2. Define and describe in detail the role of agent productivity reporting and how this category of reports fits in the overall call center reporting needs defined in deliverable 1.
3. Define what components should comprise the Interval Level (intra-day) reporting. Create a BRD comprising the required elements of interval based reporting. It should be centered around volumes and service based data and will not include agent performance elements.
4. Develop an inventory of “monitoring requirements” (high – level specifications) for agent product. For this deliverable, use the Report Inventory Template. The elements of each entry of the inventory are:
   1. Object Name
   2. Brief Description
   3. Business Purpose
   4. Primary data elements used in the object , e.g., metrics, targets, filters, etc.
   5. Intended users of the object
   6. Frequency of delivery (and delivery method)
   7. Priority
5. For all high priority BIOs, detailed specifications (consistent with MicroStrategies BI Suite) produced in a standardized template (see example attached). Data must map back to the data model defined in the BRD (see table 1).

**MAXIMUS Responsibilities**

MAXIMUS will provide a project Executive Sponsor (Randall Riefel) who will serve as the principal contact for SPOT and will accept all deliverables. MAXIMUS will also ensure that SPOT have access to MAXIMUS staff necessary to provide information on MAXDat / MicroStrategies architecture.

**Timing**

Work will begin 17 Feb and continue for a period of 60 days.

**Professional Fees and Expenses**

Professional fees for this project will be billed at the rate of $175 per hour and the maximum hours will not exceed 70. If the project is completed in less time than 70 hours, then those are the only hours that will be billed.

Appendix A

Reporting Service Matrix



Metric Targets and Goals

