

Date: April 3, 2022

To,

Bill Nixon,
Sr. Business Analyst,
Conestoga College,
Kitchener, ON

Subject- Regarding the Project 3 – Project Management Documents

Respected Mr. Nixon,

I hope you are doing well. I am Mayurkumar Rafaliya, the Project Manager of Team G. I am writing this letter regarding the project management documents created in project 3 for analyzing and delivering the call center issues of OHT. The following are a few essential documents created for the Project 3 Project Management Documents deliverable:

- Client Background
- Project Scope
- Tools and Techniques
- Considerations

It would be a great honor for us if you could review the documentation and provide your valuable feedback, which would guide us for future analysis. I look forward to hearing from you soon.

Regards,

Mayurkumar Rafaliya
(Project Manager)



PROJECT MANAGEMENT DOCUMENTS

Project 3

Team G

MAYURKUMAR RAFALIYA
PRAJWAL NAYAK
JIGEESHA KOCHER
CHAITANYA KEESARI
CATHLEEN MATHEW MUNDAT
ANUSHA ASOKAN PALAT

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1. DOCUMENT HISTORY CHART

| Sr N | Revised Date | Document Name | Created By | Action |
|------|--------------|--|--------------------------------------|---|
| 1 | 04/02/2022 | Cover Letter | Cathleen Mathew | Created a cover letter and published it |
| 2 | 04/02/2022 | Cover Page | Cathleen Mathew | Created a cover page |
| 3 | 04/02/2022 | History and Background of OHT | Anusha Ashokan Palat | Research and created a client background |
| 4 | 04/02/2022 | List of the involved persons / roles / actors / stakeholders | Jigeesha Kocher | Went through all the knowledge and Created a list of persons, roles, actors and stakeholder |
| 5 | 04/02/2022 | List of current business challenges of OHT | Chaitanya Keesari | Listed all the challenges of OHT |
| 6 | 04/02/2022 | The Brand involved and their Status | Jigeesha Kocher | Listed all the brands and their status |
| 7 | 04/02/2022 | As-Is Principle and Key Metric | Mayurkumar Rafaliya | Reseached about AS-IS principle and key Metrics |
| 8 | 04/02/2022 | Project Scope | Anusha Ashokan Palat | Developed a project scope and published it |
| 9 | 04/02/2022 | Known Client Requirement | Anusha Ashokan Palat | Gathered known client Requirements |
| 10 | 04/03/2022 | RACI Matrix and Gantt Chart | Mayurkumar Rafaliya Prajwal Nayak | Created a raci Matric and Gantt chart |
| 11 | 04/03/2022 | Work Breakdown Structure | Cathleen Mathew | Created a work break down structure |
| 12 | 04/03/2022 | Team Contract | Cathleen Mathew | Developed team contract and get the signature from others |
| 13 | 04/03/2022 | Consideration | Chaitanya Keesari | Created a consideration for OHT |
| 14 | 04/03/2022 | Style Guide | Chaitanya Keesari | Created a style guide for project documents |
| 15 | 04/03/2022 | Measures of Success | Jigeesha Kocher | Developed measures of success for team |

| | | | | |
|-----------|------------|-------------------|-----------------|--|
| 16 | 04/03/2022 | Assumptions | Jlgeesha Kocher | Gathered assumption from team and documented |
| 17 | 04/03/2022 | References | Cathleen Mathew | Created a reference list |
| 18 | 04/03/2022 | Document Creation | Cathleen Mathew | Collated all the part of the document and created a final report |
| 19 | 04/03/2022 | Document Review | Team G | Reviewed the Final document |

2. CLIENT BACKGROUND

History and Background of OHT:

Oury Health Tech Ltd (OHT), a business-to-business organization, started its business in January 1998. The organization is into selling medical equipment to the local medical clinic and also launched its new wearable fitness monitor, TrackR, in February 2017. The CEO of the company is Billy Bob. The organization is planning to expand in the future; currently, they have six executives working under multiple departments with 100 employees.

Initially, the TrackR business gained popularity among the public, but soon, a major retailer and customers returned the products due to complaints regarding the TrackR's application. The number of customers calls to the OHT's call centre increased immensely. The OHT's Customer Support Division, which initially handled the support calls in two minutes and 15 seconds, could not handle the current situation. The average call duration increased by 29 minutes and 50 seconds. Each of these telephonic sessions lasted above 30 minutes. The TrackR employees were stressed out and are under tremendous pressure. The TrackR end users are unable to contact the support team, so the number of TrackR returns increased.

Eventually, in December 2018, the company announced the potential bankruptcy in the upcoming two years. The organization now requires the Business Analysts who are hired to understand the support call durations from past and present. The Business Analysts are to analyze the operational data of call centre employees to develop As-Is and To-Be profiles and come up with effective suggestions and models to restructure the call centre's process and infrastructure.

More details about the client background can be checked in the attached file with the filename:

1. P2 Call Centre Needs 21May07
2. Call Centre Overview 21May05
3. OHT Timeline Phase 2 210507
4. OHT Call Centre Processes 21May05
5. OHT Timeline Phase 1 210507
6. OHT Org Chart as of 2018July – 210530

3. List of the involved persons / roles / actors / stakeholders

The following table displays the people involved in their roles/ actors /stakeholders.

| ID.No. | Involved Persons | Role/Actors | Description |
|--------|-----------------------------|----------------------------------|---------------------|
| 1 | Billy Bob | CEO | Client/ Stakeholder |
| 2 | Medical Imaging's Customers | Customer | Client |
| 3 | Medical Imaging Clients | Customers | Client |
| 4 | Team Member | Support Staff | Stakeholder |
| 5 | Team member | Product Expert | Stakeholder |
| 6 | Team Member | Customer Service representatives | Stakeholder |
| 7 | Team Member | TrackR Customer Service Manager | Stakeholder |
| 8 | Team Member | CSD Manager | Stakeholder |
| 9 | Marketing Director | OHT Director | Stakeholder |
| 10 | Team Member | OHT Employees | Stakeholder |
| 11 | Team Member | Head of Call Center | Stakeholder |
| 12 | Team Members | CSD Employees | Stakeholder |
| 13 | Team Member | Greeter | Stakeholder |
| 14 | Team Member | TrackR Tech | Stakeholder |
| 15 | Team Member | TrackR Tech Expert | Stakeholder |
| 16 | Team Member | OHT Med Tech | Stakeholder |

4. List of current business challenges of OHT

The following table lists the present challenges faced by OHT.

| ID.No | Current Business Challenges | Description |
|-------|--------------------------------------|---|
| 1 | Decreased Customer Satisfaction | OHT is in need to increase customer satisfaction by enabling proper methods to be more approachable for the customers. |
| 2 | Increased call times and busy lines. | Decrease the call time and avoid missing and abandoning calls from the customers. |
| 3 | Inadequate Call centre procedure | Upgrade the infrastructure of the call centre process due to waste of labour and drastically decreased customer satisfaction. |
| 4 | Inefficient marketing strategies. | Lack of proper marketing strategies to increase demand and loosing the current demand with busier customer lines. |
| 5 | Lack of usage of customer data. | Lack of usage of call centre process feedback data on dPBX to improve and increase customer satisfaction. |
| 6 | Inadequate employee protocols. | Lack of employee satisfaction due to inadequate management and lack of standard protocols. |

5. The brand(s) involved, and their current statuses

| S.No | OHT Organization | Current Status |
|------|---------------------------|----------------|
| 1 | OHT TrackR | Business |
| 2 | OHT Medical Imaging | Business |
| 3 | TrackR Customers | End Users |
| 4 | Medical Imaging Customers | End Users |

6. AS-IS Principle and Key Metric

- All support for the TrackR should be provided over the phone calls.
- All the call are first picked up by the greeter and then it is directed to the different department as per the customer's requirement.
- CSD uses a Digital Private Branch Exchange (dPBX).
- Currently, OHT's VP meets 3 times a week every week.
- OHT Call Centre's first-line staff are paid \$16.00 per hour and have a payroll burden factor of 1.35. As well, experts and CS Managers are paid \$21.00 per hour.

7. PROJECT SCOPE

| | |
|---------------------------------|--------------------------------|
| Project Name: | OHT Call Centre Project |
| Date Submitted: | 4/3/2022 |
| Prepared By: | Anusha Asokan Palat |
| Project Start Date: | 03/25/2022 |
| Project End Date: | |
| Senior Business Analyst: | Bill Nixon |
| Program Manager: | Mayur Kumar Rafaliya |

Known Client Requirements:

For more details, please go through points 0 to 29 in the attached document named P2 Call Centre Needs 21May07' (Link:

<https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890061/View>).

This document was provided to us by the client.

Summary of Project Deliverables:

| DivID | Project Final Deliverables (RFIs and PM Docs Deliverables are optional) | Need / Requirement ID |
|--------------|--|------------------------------|
| A | Letter of Transmittal | 20 |
| B | Cover Page | 20 |
| C | Page Headers, Footers and Numbering | 20 |
| D | TOC | 20 |
| E | Document History | 20 |
| F | Executive Summary | 21 |
| G | Assumptions | 21 |
| H | Conclusions | 21 |
| I | Background and overview of client | 22 |
| J | Requests for Information with NDA (included as an Appendix) | 23 |
| K | Project Scope Document | 24 |
| L | Business Challenges | 22 |
| M | Current Brands Involved and their Statuses | 22 |
| N | Detailed References for all Sources of Knowledge | 23 |
| O | Possible Future Analysis and Development for Call centre analysis | 26 |
| P | Measuring Success and Failure in call centre analysis | 26 |
| Q | Probable benefits of suggestions in the Call centre analysis | 26 |
| R | Data analysis operational Excel Report for Greeters, Tech Supports and Experts | 1 |
| S | Data analysis operational Excel Report for CSR and Managers | 2 |
| T | AS-IS Process Flow | 3 |
| U | To-Be Process flow | 3 |
| V | AS-IS Pseudocode | 3 |
| W | To-Be Pseudocode | 3 |
| X | AS-IS Swimlanes | 3 |
| Y | To-Be Swimlanes | 3 |
| Z | Suggestion on changing staff report | 4 |
| AA | Numerical Projection for Suggested Change in staff members | 4 |
| AB | Detailed suggestion about Website technology | 5 |
| AC | Suggestion Report on Infrastructure Upgradation | 6 |
| AD | Payrate Data and Model Calculations | 7 |
| AE | Gantt Chart | 25 |
| AF | Merged Final Report | 29 |
| AG | Powerpoint Presentation | 27 |

| | | |
|-----------|-------------------------------------|----|
| AH | Final RFI report | 23 |
| AI | RACI+, Documentation, Backup Sheets | 25 |
| AJ | Time and Effort Reporting | 25 |

Activities to do to produce the Deliverables: For most of the deliverables mentioned, we will be researching, creating, developing, packaging, and publishing them.

8. TOOLS AND TECHNIQUES

RACI MATRIX

RACI (Responsible, Accountable, Consulted, Informed) Matrix is a chart used to determine the role and responsibility of the tasks of all the employees. Also, it consists of all the decisions taken place while working on the project's deliverables.

Please find the attached file with the file name:

'W22_INFO8440_TeamG_Project3_RACIMatrix_GanttChart'.

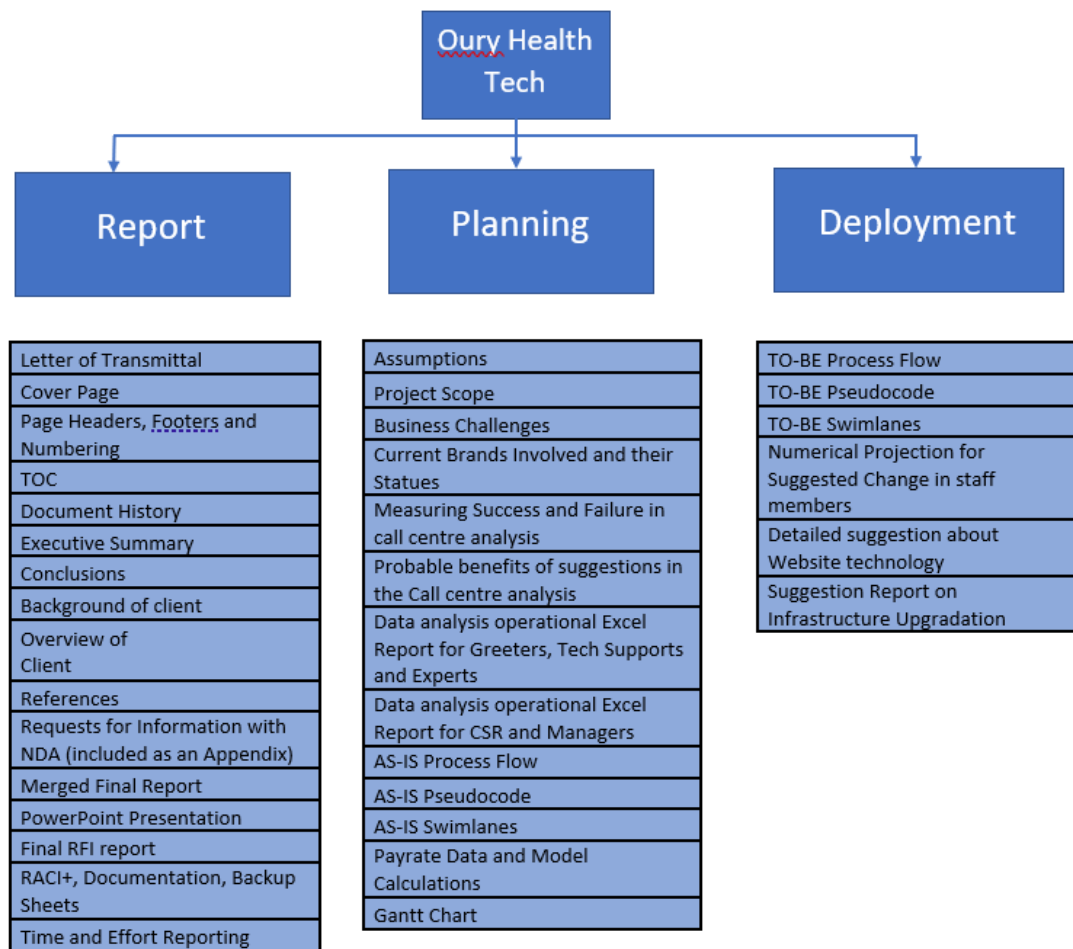
GANTT CHART

A Gantt chart is used for planning and scheduling all the work. It is mainly used to simplify complex projects. It consists of the start date, end date, duration, and progress of each activity.

Please find the attached file with the file name:

'W22_INFO8440_TeamG_Project3_RACIMatrix_GanttChart'.

9. Work Breakdown Structure



10. TEAM CONTRACT

Date: 03/04/2022

Project Name: OHT Call Center

Project Team Members' Names and Sign-off:

| S.No | Name | Date | Signature |
|------|-------------------------|------------|--------------------------------|
| 1 | Mayurkumar Rafaliya | 04/03/2022 | <i>Mayurkumar Rafaliya</i> |
| 2 | Prajwal Pundalika Nayak | 04/03/2022 | <i>Prajwal Pundalika Nayak</i> |
| 3 | Jigeesha Kocher | 04/03/2022 | <i>Jigeesha Kocher</i> |
| 4 | Cathleen Mathew Mundat | 04/03/2022 | <i>Cathleen Mathew Mundat</i> |
| 5 | Chaitanya Keesari | 04/03/2022 | <i>Chaitanya Keesari</i> |
| 6 | Anusha Asokan Palat | 04/03/2022 | <i>Anusha Asokan Palat</i> |

1. Code of Conduct: As a project team, we will:

- 1.1 Work with dedication, come up with a practical solution, coordinate with each member in the group, predict potential issues, and work together to avoid problems.
- 1.2 Be truthful and honest that we will follow ethics and rules.
- 1.3 Be courteous and patient to all the team members in the group.
- 1.4 Concentrate on what is best for the project team and keep every team member updated.

2. Participation: We will:

- 2.1 Respect each team member's various functional and technical roles.
- 2.2 Respect the views of every team member and value their unique ideas and opinions.
- 2.3 Treat every member of the team equally valuable.
- 2.4 Inform the Project Manager well in advance about the absence of a team member for a meeting or any issues meeting a deadline for an assigned task.
- 2.5 Consider innovative ideas and be always open to suggestions and opinions.

3. Communication: We will:

- 3.1 Maintain contact to the team in the best available options to respond, especially if it's urgent and essential, i.e., text message, e-mail, a project website, and any other technology.
- 3.2 Organize every team meeting through zoom online video conferencing as required.
- 3.3 Communicate our ideas and suggestions to the team clearly and concisely.
- 3.4 Make sure to eliminate any communication ambiguities.

4. Problem Solving: We will:

- 4.1 Set our goals, communicate them with the rest of the team, and work together to achieve them.
- 4.2 Encourage every team member to participate and share their views and ideas.
- 4.3 Make sure only to use constructive criticism and not blame other people.
- 4.5 Participate in problem-solving, troubleshooting the problem, and effective decision-making.

5. Meeting Guidelines: We will:

- 5.1 Make use of the class hours and connect through the online zoom meeting till 4.00 PM on Thursday and Friday.
- 5.2 Schedule an online zoom meeting apart from class hours after 4.00 PM on Thursday and Friday, and during the other days, schedule meetings as per the availability of team members.

11. Consideration

11.1 Risk Mitigation Plan

The below table depicts the risks and risk mitigation involved in this project.

| S. No | Risk | Risk Occurrence | Risk Impact | Risk Description | Risk Mitigation |
|-------|--------------------------|-----------------|-------------|--|--|
| 1. | Individual Issues | High | Moderate | A team member not being able to contribute due to personal/health /other issues could affect the outcome of the group. | Creating a RACI, conducting daily scrum meetings to follow up on the deliverables staying up to date on the individual progress, supporting one another, and working as a team to deliver the best outcome. |
| 2. | Team Disputes | High | Moderate | One or more team members have disagreements over varied opinions. | The manager will be responsible for conducting team meetings meeting with the individuals facing the dispute to discuss the issue and resolve it, considering all the team opinions not to affect the team's outcome. |
| 3. | Unorganized Workload | Moderate | High | One or more team members could face unequal workload due to the unorganized distribution of work. | A properly planned, team-approved RACI is established and updated during the projects. We will conduct daily scrum meetings, which will take feedback to avoid overburdening the team members. |
| 4. | Unforeseen Circumstances | Low | High | One or more facing a blackout/Internet Issues/Weather Conditions, etc., could affect meeting the deadlines. | The Team Manager will be responsible for contacting the team member/s to check if everything is alright and assign the work among other team members to cover for the affected individual/s or contact the client to explain the situation and request an extension. |

12. Style Guide

| Title Font | |
|------------|----------------------------|
| Size | 36 |
| Style | Heading 1 |
| Font | Calibri Light (Headings) |
| Colour | Blue, Accent 1, 40% Darker |
| Example | Title |
| Heading 1 | |
| Size | 16 |
| Style | Heading 1 |
| Font | Calibri Light (Headings) |
| Colour | Blue, Accent 1, 25% Darker |
| Example | Heading 1 |
| Heading 2 | |
| Size | 13 |
| Style | Heading 2 |
| Font | Calibri Light (Headings) |
| Colour | Blue, Accent 1, 40% Darker |
| Example | Heading 2 |
| Heading 3 | |
| Size | 12 |
| Style | Heading 3 |
| Font | Calibri Light (Headings) |
| Colour | Blue, Accent 1, 40% Darker |
| Example | Heading 3 |
| Body | |
| Size | 12 |
| Style | Normal |
| Font | Calibri (Body) |
| Colour | Black |
| Example | Content |

13. Measure of Success of the Team

- Providing effective solutions to CDL aligning and fitting with CDL project scope and cost, therefore CDL can easily jump back again to market from its current situation.
- Accomplishing and delivering the task by all the team members by working on time.
- As a business analyst, we will make sure that we follow professionalism and come up with realistic and cost-efficient solutions.
- Each team member will respect others and share their thoughts and ideas related to the project.
- Client approval will be treated as most important. Feedback sessions can be held to discuss the scope improvement after each deliverable.

14. Assumptions

- All the funding and resources needed for the project are available.
- All the technology devices needed are accessible by the team
- The standard quality of the team will not be compensated.
- The project will be completed before the deadline according to all the business needs of the client.
- Project working environment will be positive and understanding

15. REFERENCES

1. EConestoga. (2022, February 23). *Call Center Overview 21My05*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890059/View>
2. EConestoga. (2022, February 23). *OHT Timeline Phase 2 210507*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890066/View>
3. EConestoga. (2022, February 23). *P2 Call Center Needs 21May07*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890061/View>
4. EConestoga. (2022, February 23). *OHT Call Center Processes 21May05*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890069/View>
5. EConestoga. (2022, February 23). *Digital PBX Configuration 21May05*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890060/View>
6. EConestoga. (2022, February 23). *PBX Sample Data Modes 1 to 49 190502*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890052/View>
7. EConestoga. (2022, February 23). *OHT Timeline Phase 1 210507*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890019/View>
8. EConestoga. (2022, February 23). *OHT Org Chart as of 2018July*. EConestoga. Retrieved April 3, 2022, from <https://conestoga.desire2learn.com/d2l/le/content/539481/viewContent/11890033/View>