**Project Scope Document**

**Project Title**: IT Support Ticketing System for an IT Consulting Company

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**Project Overview**

The project aims to create and deploy a support ticketing system for an IT consulting company. The system will serve both external clients and internal employees, enhancing the tracking and handling of customer requests and issues. This system will streamline support operations, improve response times, and elevate customer satisfaction by providing a centralised platform for issue resolution.

**Objectives**

1. **Centralised Tracking**: Develop a centralised system for tracking client issues and requests to ensure no ticket is overlooked.
2. **Timely Resolution**: Implement Service Level Agreements (SLAs) to ensure timely resolution of tickets.
3. **Operational Efficiency**: Improve efficiency and transparency in issue resolution processes.
4. **Enhanced Satisfaction**: Enhance client satisfaction through a structured and monitored support process.

**Scope**

**In-Scope Items**:

1. **Development and Configuration**:
   * Implement a support ticketing system that caters to both external clients and internal employees.
     + **External Clients**: Handle issues and requests related to automated trade-related process workflows designed by the company's Business Analysts (BAs). Clients will raise tickets for issues or requests for process enhancements.
     + **Internal Employees**: Address hardware issues (PC/Laptop) and software installation requests through the ticketing system.
   * Customise workflows, forms, and user interfaces based on specific needs.
   * Develop necessary features and functionalities within the system, such as categorising tickets, prioritising issues, and assigning tickets to appropriate support personnel.
2. **Integration**:
   * Integrate the ticketing system with existing communication channels (email) to ensure seamless communication.
   * Notify customers about the progress of their concerns or requests via email notifications. These notifications will include status updates, expected resolution times, and any required actions from the customer.
   * Ensure the system can send email notifications reliably, considering potential internet connectivity issues that may cause delays.
3. **Implementation of SLAs**:
   * Define and implement SLAs to ensure tickets are resolved within predefined time frames.
   * Develop automated alerts and escalation processes for tickets that are approaching or exceeding SLA limits.
4. **Training and Documentation**:
   * Develop comprehensive training materials and conduct training sessions for all users, including support staff and end-users.
   * Create detailed documentation on system usage, troubleshooting procedures, and best practices for handling tickets.
5. **Continuous Monitoring and Improvement**:
   * Establish a plan for ongoing monitoring of the system’s performance, including regular reviews of key metrics such as response times, resolution times, and customer satisfaction.
   * Implement a continuous improvement process to gather feedback from users, identify areas for enhancement, and update the system accordingly.

**Out-of-Scope Items**:

1. **Custom Development of Additional Features**: Beyond the standard ticketing system functionalities.
2. **Integration with Non-IT Related Business Processes**: Only IT-related issues and processes will be managed through the system.
3. **Ongoing Support and Maintenance**: Post-implementation ongoing support and maintenance will be handled separately from this project.

**Constraints**

* **Budget**: £43,000, including software licences, development costs, training, documentation, and miscellaneous expenses.
* **Time**: Strict deadlines for each milestone must be adhered to, ensuring the project is completed within the allocated timeframe.
* **Resources**: Dependent on the availability and expertise of the project team, who must be fully dedicated to this project.

**Assumptions**

1. Adequate resources and support will be available throughout the project.
2. Stakeholders will provide timely feedback and approval at each stage of the project.
3. Existing infrastructure will support the new system without requiring significant upgrades or modifications.

**Risks**

1. **Delays in Software Acquisition or Configuration**: Potential delays in obtaining and configuring the ticketing software could impact the project timeline.
2. **Resistance to Change**: Users accustomed to the current system may resist transitioning to the new ticketing system, impacting adoption rates.
3. **Technical Issues During Integration**: Integrating the new system with existing tools and infrastructure may present technical challenges.
4. **Dependency on Internet for Email Notifications**: Email notifications rely on internet connectivity, which, if disrupted, may delay communication with customers.

**Stakeholders**

* **Project Sponsor**: John Doe, CEO
* **Project Manager**: Jane Smith
* **IT Team**: Developers, System Administrators
* **Support Team**: Level 1, Level 2, and Level 3 Support Staff
* **Clients**: Internal and External Users

**Milestones**

1. **Project Planning and Initiation**: June 10, 2024
   * Approval of the project and allocation of resources.
   * Confirmation of project sponsor, project manager, IT team, support team, and other stakeholders.
2. **Requirements Gathering**: June 15, 2024
   * Conduct interviews, surveys, and workshops to gather detailed requirements from stakeholders.
   * Document use cases, user stories, and functional specifications.
3. **System Design and Architecture**: June 30, 2024
   * Develop the overall system architecture.
   * Create architectural diagrams and documentation.
   * Ensure the design is scalable, secure, and meets performance requirements.
4. **Development and Configuration**: July 31, 2024
   * Configure and customise the ticketing system based on project requirements.
   * Develop necessary features and functionalities.
   * Write and execute unit tests to ensure code quality.
5. **Integration and Testing**: August 15, 2024
   * Integrate the ticketing system with existing communication channels (email).
   * Develop and execute comprehensive test plans covering functional, regression, and performance testing.
   * Identify, document, and track bugs, ensuring they are fixed and retested.
6. **User Training and Documentation**: August 25, 2024
   * Develop training materials and conduct training sessions for users.
   * Provide detailed documentation on system usage and troubleshooting.
7. **Pilot Testing**: September 10, 2024
   * Conduct pilot testing with a small group of users.
   * Gather feedback and make necessary adjustments to the system.
8. **Full Deployment**: September 30, 2024
   * Deploy the system for all users.
   * Monitor system performance and user feedback.
   * Plan for continuous monitoring and improvement.

**Options Considered**

1. **Develop a System from Scratch**: Requires more time and hiring new developers.
2. **Use an Open-Source Ticketing System**: Can be used within a couple of months and customised as needed. Considering Freshdesk as the current option.

**Additional Items to Include**

1. **Customer Satisfaction Metrics**: Define metrics to measure improvement in customer satisfaction.
2. **User Feedback Mechanism**: Implement a system for users to provide feedback on the ticketing system.
3. **Change Management Plan**: Develop a plan to manage resistance to change and ensure a smooth transition to the new system.
4. **Performance Monitoring**: Establish a method for continuous performance monitoring and reporting to track key performance indicators (KPIs) such as ticket resolution time, user satisfaction, and system uptime.

**Project Approval**

**Project Sponsor**: Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Client**: Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Project Manager**: Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_