**Nesting Process Checklist**

**Pre-Nesting/Overall**

1) How many nesters are there \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2) Is more permanent assistance needed beyond the trainer? Y / N

Why? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Who is wished to be available to help: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Has management and representative approval been given? Y / N

List of good floor resources for permanent/temporary assistance:

|  |  |  |  |
| --- | --- | --- | --- |
| Alex King | Frank Gori | Jason Secor | Andrew Zioto |
| Dan Gifford | Tom Welderly | Sam Bogardus | Roxanne Armstrong |
| Dan Parsons | Colin Lucey | Ben Taylor | Meredith Couture |

3) Has the training class been notified when nesting begins, and the shift in nesting hours? Y / N

4) Has the training class been reminded during the 2nd to last week, and last week of nesting? Y / N

5) Are there any issues with the trainees being moved to that time for nesting? Y / N  
 If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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6) Has Will Hofferbert been notified of what cubes the nesters are to be moved to during the last week of training? Y / N

7) Was a email created for: Week 1? Y / N   
 Week 2? Y / N   
 Week 3? Y / N   
 Week 4? Y / N

**Week 1**

* The tickets that should be assigned should be similar in nature to the below issues whenever possible:
  + Non T1/T2 hosted only (or confirmed remote access) non P1s
  + Filter log hunts
  + Spam/TAP related issues

1) Has the FLS team been advised to assign tickets to the nesters starting Monday of week 2? Y / N

2) By close of class Friday, are there any nesters who are having issues with their written communication? Y / N

Who is having the issue?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Nester WIPs should be slowly increased throughout the week to help prepare them for when they are out of nesting. WIP assignment should attempt to follow the below progression:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| 1 WIP | 1-2 WIPs | 2 WIPs | 2-3 WIPs | 3 WIPs |

3) Are there any issues with WIP assignment? Y / N  
 If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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4) If utilized, can the permanent representative assistance give 1-on-1 T1/T2 ticket work experience to the nesters? Y / N

5) If the answer to the above question was no, has management and representative approval been given AND has a tentative schedule been given out on which nester would be working with a Triage representative at a time? Y / N / Not Applicable

6) Has there been any issues with having debriefs occur consistently? Y / N

If so, what could be done to help these debriefs occur?

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7) Were the nesters advised/shown of where they will be sitting at the start of Week 2? Y / N

8) Have coaches been reminded early Wednesday to perform a QA on each of the nesters by the end of the week? Y / N

9) Was a QA received for each nester by the end of week 1? Y / N

**Week 2**

1) Were there any issues with the move of the nesters’ images? Y / N

2) Were there any issues with the nesters logging into Talkdesk? Y / N

3) Was warm transferring tested with the nesters using Talkdesk? Y / N

4) Have the nesters been advised of Bad News training? Y / N

* The tickets that should be assigned should include those from last week. The nesters can begin working on P2 cases. Additionally, cases similar in nature to the below issues can be assigned:
  + Mail Delays
  + User Import related issues
  + General Errors

5) Has FLS been advised to assign out “simple” outbound call cases? Y / N / Not Needed

6) Was each nester able to have 2 outbound calls by Thursday? Y / N

If not, list below who still needs to make these calls

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7) Is each nester outbound approved by the end of the week? Y / N  
 If not list below who is not approved, be sure to include this detail in the weekly email

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8) Have the nesters had practice with WebEx/Zoom? Y / N

* Nester WIPs should be slowly increased throughout the week to help prepare them for when they are out of nesting. WIP assignment should attempt to follow the below progression:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| 3-4 WIP | 4 WIP | 4-5 WIP | 5 WIP | 5-6 WIP |

9) Are there any issues with WIP assignment? Y / N  
 If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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10) Has Shane been able to perform a QA for each of the nesters by the end of the week? Y / N

11) Were the nesters able to at least have the Friday debrief? Y / N

**Week 3**

1) Have nesters been advised of queue management? Y / N

* The tickets that should be assigned should include those from last week. Additionally, cases similar in nature to the below issues can be assigned:
  + NOC P1s
  + Digest related issues
  + Encryption related issues

2) Are any nesters not outbound approved? Y / N  
 If so, list them below

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Have the TMs been notified for a coaching plan to be used? Y / N

* Nester WIPs should be slowly increased through the week to help prepare them for when they are out of nesting. WIP assignment should attempt to follow the below progression:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| 6 WIP | 6-7 WIP | 7 WIP | 7-8 WIP | 8 WIP |

3) Are there any issues with WIP assignment? Y / N  
 If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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4) Were each nester able to have 2 inbound calls by Thursday? Y / N

5) Are all nesters inbound approved by Friday? Y / N

If not, detail who is not approved below and include in weekly email

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6) Were nesters able to have 2 QAs from their manager performed this week? Y / N

7) Were nesters able to have 1-on-1 time with their manager to discuss at least 1 QA? Y / N

8) Were the nesters able to have at least the Friday debrief? Y / N

9) Has an email been sent to TMs and Will Hofferbert on Monday to begin scheduling the nester desk moves? Y / N

**Week 4**

* The nesters should feel free to be assigned most any tickets. If any ticket seems exceptionally “nasty” (ex: a really complicated in depth issue, or a really bad legitimate P1) it should attempt to go elsewhere, but all cases can be assigned, including P1s, and Triage completed T1/T2 cases.

1) Have the nesters been advised how to escalate cases? Y / N

2) Have the nesters been added into the HipChat room of “Case Transfers”? Y / N

* Nester WIP at this point can be increased, or can remain the same. The primary aspect to determine this is to see where the rest of the L1 floor is at with WIPs. If the floor has WIPs at 8, keep the nesters at 8. If it is higher, continue to increase WIPs at the same rate (0.5 WIP a day) as has been occurring during each week until the floor’s average WIP amount has been met.

3) Are there any issues with WIP assignment? Y / N

If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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4) Are any nesters not inbound approved? Y / N

If so, list them below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Have the TMs been notified for a coaching plan to be used? Y / N

5) On Monday, have the TMs determine what desks the nesters are moving to? Y / N

If No above, determine the desks for nesters to move to and give TMs until Wednesday to disapprove. If there are no disapprovals, advise Will Hofferbert to have the images moved from their current desk number, to their new desk number.

6) Has Shane performed QAs for the nesters during the last week? Y / N

7) Have the nesters been advised how commission will work and when it will affect them? Y / N

8) Has the final debrief occurred? Y / N

9) Have the nesters been advised of their shift times and desk moves? Y / N