

File - Acceptance
ICL Pathway Resolution Plan for AI408- Horizon System Helpdesk
Company-in-Confidence
Ref: CR/ACD/408
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408

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Abstract: This document provides additional information and explanation concerning the resolution of AI408.

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0.0 Document Control

0.1 Document History

Version No.	Date	Reason for Issue
1.0	26/08/99	First issue
1.1	08/09/99	Updated following workshops and reviews with POCL

0.2 Approval Authorities

Name	Position	Signature	Date
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0.3 Associated Documents

Reference	Version	Date	Title	Source
1) CS/SMM/AI408	1.0	17/08/99	HSH Scripting, SLA Recovery and Resource Plan	ICL Pathway
2)	1.0	24/08/99	AI408 - HSH Service Level Failure	POCL

0.4 Abbreviations/Definitions

Abbreviation	Definition
FTE	Full Time Equivalent
HSH	Horizon System Helpdesk
SLA	Service Level Agreement

0.5 Changes in this Version

Version	Changes
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1.1	Primarily changes following the Acceptance Workshop on 26 August and the Call Volume/HSH Model Workshop on 8 September. Revision to document title.
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1 Introduction

This document has been produced following the POCL / ICL Pathway Acceptance Board Meeting of 18/08/99 and addresses the comments made in the minutes of that meeting with respect to Acceptance Incident 408 and the statements made in the POCL paper *AI408 - HSH Service Level Failure - 24/08/99*.

This document provides additional information and explanation to that contained in *HSH Scripting, SLA Recovery and Resource Plan - CS/SMM/AI408 - 17/08/99* issued to POCL as input to the Acceptance Board.

This document has been updated in the light of the Acceptance Workshop of 26/08/99 and the Call Volume/HSH Model Workshop on 8 September.

2 Scope

The scope of this paper comprises the content of AI408, the contents of the above paper CS/SMM/AI408, the topics contained in the draft minutes from the above Acceptance Board meeting and the paper *AI408 - HSH Service Level Failure*.

The topics can be summarised as :-

- Plan for production and implementation of additional HSH Cash Account scripts
- HSH Resource Plan, comprising call volume projections and HSH staffing projections
- HSH SLA Rectification Plan

3 POCL position

Based upon the minutes of the Acceptance Board meeting of 18 August 1999, POCL contended that:

"production of scripts is not complete"

"It does not take account of activities such as the need to train staff"

"some items have already missed dates"

"call volume projections and staffing projections contain assumptions that POCL cannot agree based on experience to date"

On 24/08/1999 POCL also provided the paper *AI-408 - HSH Service level Failure*. This supplemented the above points as follows:

- POCL's experience to date is that some scripts have resulted in inappropriate advice resulting in further calls to HSH and the National Business Support Centre.
- POCL requires an explanation of how the call volume projections are produced and the logic that supports this process.
- POCL requires that the SLA rectification plan is produced and agreed.

4 ICL Pathway position

Taking the three main topics within this AI, ICL Pathway's position can be summarised as:-

- HSH scripting plan - The plan described in section 2 of ref. (1) remains the basis for addressing this aspect of the AI. The Acceptance Board may not have been aware that actions designated for the 17th and 18th August were completed on time. Subsequent actions within ICL Pathway and POCL have been completed in a timely and co-operative manner from all parties involved. The revised HSH Cash Account script document was re submitted to POCL as Cash Account Process - ICL/PW/DSP/PRO/023 - version 2.1 - 24/08/1999.

(At the Acceptance Workshop of 26/08/99, POCL advised that there were further comments on the scripts and a joint POCL/Pathway workshop aimed at finalising the scripts was planned for (and was held on) 02/09/99)

- HSH Resource Plan - Call Volume prediction

ICL Pathway wish to ensure that POCL has confidence in the modelling tools and management processes that are used to manage the Horizon System Helpdesk in terms of staffing levels. The development of the HSH resource model draws upon a decade of market leading experience of ICL providing Help Desk Services to a diverse range of Clients.

Some of the key assumptions were introduced in ref. (1) and to supplement this ICL Pathway proposed that a workshop be held with POCL to address POCL's concerns. A set of objectives for this event was proposed in section 5.2. This event was held 7-8/9.

The HSH has experienced a substantial increase in calls on Wednesday / Thursday associated with outlets having difficulties in completing the Cash Account process. This increase in business related calls was not predicted and it is ICL Pathway's intention to establish a cash account domain of skilled staff with the appropriate business knowledge dedicated to handling this increase.

ICL Pathway does not consider it appropriate for these complex business related calls to be handled within the SLA constraints of the Level 1 / Level 2 call definitions. These calls have distorted the SLA performance.

- SLA Rectification Plan

The actions and target dates that will contribute to an improvement in the HSH SLAs are set out in section 5.3.

5 Clarifications and Progress

5.1 HSH Scripting Plan

The script production plan described in ref.(1) and shown below has now been successfully achieved with all actions completed on time.

No.	Description	Target date	Owner	Achieved
1	Produce additional elements of Cash Account Process document in draft form for POCL comment	17/08/99	P. Curley	✓
2.	Review and issue additional scripts to POCL	17/08/99	P. Curley	✓
3.	POCL review and comment on new scripts	19/08/99	POCL	✓
4.	Collate and respond to comments	20/08/99	P. Curley	✓
5.	Review and respond to POCL comments on version 2.0 draft of document	17/08/99	P. Curley	✓
6.	Review comments with HSH	19/08/99	P. Curley	✓
7.	Incorporate accepted comments into document from new scripts and comments against draft Ver 2.0	23/08/99	P. Curley	✓
8.	Issue Document as V2.1 definitive (status to be confirmed with POCL)	24/08/99	P. Curley	✓

5.1.1 Future activities

Following agreement of the new scripts, and in conjunction with the establishment of the cash account domain, these scripts come into operation from 08/09/99.

It has been agreed that a joint ICL Pathway / POCL review be held on 14/09/99. The objectives of the review will be to:

- Confirm that there has been a reduction in inappropriate advice given to outlets
- Confirm the effectiveness of the scripts
- Review if the Cash Account call duration has become predictable and manageable
- Confirm the operational usability of the scripts

Such reviews will continue in line with the recommendation in ICL/PW/DSP/PRO/023

5.2 HSH Resource Plan

5.2.1 Background

The development of the model to support the resource requirements of the HSH were based on ICL's previous experience in providing a wide range of Help Desk services covering both systems and infrastructure call types. This was supplemented by a set of assumptions covering the particular call types that ICL Pathway believed would be generated by POCL's outlets.

ICL Pathway successfully applied the call volume and HSH resource model during the period of Release 1a through to Release 1c. During this period there was good achievement against SLA targets.

During the period of LT1 it became clear that the actual call patterns diverged from those predicted by the models. In particular there were significant differences in call volumes following the introduction of the first Wednesday cash account.

Following the second and subsequent cash accounts the continuing high level of calls on Wednesday / Thursday, which had not been predicted by the model, required that remedial action should be taken.

The resources of the HSH were supplemented by expert assistance from POCL and Peritas (now termed KnowledgePool) who were able to successfully handle the complex business related aspects of these Cash Account calls. This had a beneficial impact on the call response times for the remaining calls being handled by HSH staff.

5.2.2 Service Level Analysis

Level 1 and Level 2 call resolution SLAs (excluding cash account calls as agreed with POCL) met their targets in August – see table below. This progress will be maintained throughout September and Pathway forecasts that all Helpdesk SLAs will be met during the whole of October and beyond.

	August	Target
Level 1 calls resolved within 5 minutes	95%	95%
Level 1 calls resolved within 10 minutes	100%	100%
Level 2 calls resolved within 30 minutes	98%	95%
Level 2 calls resolved within 45 minutes	100%	100%

5.2.3 HSH Staffing review

At the 08/09/99 workshop on the Call Volume/HSH model ICL Pathway shared with POCL the most up-to-date HSH resource plans for the remainder of 1999. These separately identified the staffing for cash account calls. The predicted staffing level, in terms of Full Time Equivalents, is set out below.

Model prediction (FTEs)	Oct	Nov	Dec
HSH staff (excl. cash a/c)	26	35	35
Cash a/c staff	6	8	8
Total staff	32	43	43

The planned staffing of HSH is as set out below.

	Oct	Nov	Dec
Fully operational HSH analysts	34	39	43
KnowledgePool staff for cash account domain	10	8	4

5.2.4 Conclusions

5.2.4.1 HSH staffing levels

From its analysis ICL Pathway believes that the HSH is sufficiently resourced now to meet the call volumes for Level 1 and Level 2 call types. Further resource is needed to augment performance on cash account days.

5.2.4.2 Cash Account Domain

ICL Pathway has therefore established a domain of specialist staff with the business skills to handle Cash Account related calls. The solution for service levels for Cash Account calls was discussed at the workshop on 7/8 September. In outline, it is suggested that a quality measure is adopted and operated jointly by Pathway and POCL NBSC such that a target of 95% conformance with the newly agreed scripts is achieved. The measure would be by periodic inspection or audit of all cash account calls at POCL's convenience.

5.2.4.3 HSH Resource Planning workshop

In order to ensure that POCL share ICL Pathway's confidence in the robustness and flexibility of the tools and processes used in HSH Resource planning, ICL Pathway has held a workshop with POCL to cover this topic in more detail.

The objectives of the event being: -

- To enable POCL to gain understanding and have confidence in the overall philosophy of the call volume model and its relationship to the resource planning model.
- To discuss and explain the factors and logic that apply to the modelling of call types and call profiles
- To explain the iterative management processes that are supported by the model

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- To review the impact of Cash Account related calls on service levels

5.3 SLA Rectification Plan

This section summarises the activities that comprise the SLA Rectification Plan.

	Description	Target Date
HSH Scripts		
1.	New scripts agreed with POCL	✓
2.	Implement new scripts (wef 08/09/99)	✓
3.	Initial ICL Pathway / POCL review of the implementation of scripts in accordance with ICL/PW/DSP/PRO/023	14/09/99
Call Volume/ HSH model		
4.	Hold workshop with POCL (on 07-08/09/99)	✓
HSH Staffing		
5.	Train and introduce 2 additional HSH staff TOTAL operational staff = 21 (by 31/08/99)	✓
6.	Train and introduce additional HSH staff in light of monthly updates to Call Volume/HSH Model	On-going
Call handling process		
7.	Complete refresher courses on call handling process (2 nd line) by 31/08/99	✓
8.	Start refresher courses on call handling process (1 st line) by 01/09/99	✓
9.	Complete refresher courses on call handling process (1 st line)	30/09/99
Cash Account Domain		
10.	Specialist staff identified and re-deployed by 06/09/99	✓
11.	Cash Account domain operational (wef 08/09/99)	✓
12.	Train 6 HSH staff in use of cash account scripts	17/09/99
13.	Train further 14 HSH staff in use of cash account scripts	30/09/99
SLA achievement		
14.	All SLAs met	31/10/99