

# IDR302 – Remote Customer Service Telephony

## Completion Report

Date 23 February 2022

### Document Sign-off

Name	Role	Date signed off
Anthony Weir	Project Sponsor	5/7/2022
David Graham	Service Owner	16/6/2022
Morna Findlay	Project Manager	6/7/2022
Alan Rae	Technical lead	6/2/2022
Eileen Mullan	Senior User	7/2/2022

### Background

The *digital pivot* required to support hybrid working during the pandemic saw a rapid transition from face-to-face meetings and telephone calls to online digital communication using services such as Microsoft teams and Zoom. These have worked well in supporting our internal business meetings and in supporting students in online learning but are not methods which allow the public, parents or other external parties to contact the University through the phone.

This project investigated and delivered a solution to ensure that telephone customer services could be provided by staff who were currently working remotely. Although the service will be advertised as available to all staff, this project prioritised delivering to external public-facing telephone numbers.

### Summary

The project successfully ensured that staff who were tasked with answering calls to advertised “Helpline” numbers, and whose managers engaged with the project, were able to do so remotely, whether using their computing equipment provided by the University, or their own.

### Objectives and Deliverables and Success Criteria

Unless otherwise indicated, the deliverables are a success when accepted by the Project Sponsor and the Service Owner.

	Description of the Objective	Success Criteria	Achieved YN	Notes
<b>Objective 1</b>	Understand nature of the service we will offer			

Deliverable D1.1	Identify customer-service owner stakeholders	List of main existing customer service helplines	Y	Extracted from logs
Deliverable D1.2	Describe and communicate capabilities of proposed solution for the customer-service owner audience	Document for customer service stakeholders and senior user	Y	<a href="#">Telephony web pages updated</a>
<b>Objective 2</b>	Capture appropriate data to help guide service provision			
Deliverable D2.1	Analysis of a use case for a customer service completed	Description of business requirements gained from liaising with stakeholders	Y	Spreadsheet in project sharepoint.
Deliverable D2.2	Determine which customer service lines have been receiving unanswered calls	Available data extracted.	Y/N	Available data passed to sponsor and shared with head of IS
Deliverable D2.3	Confirm number of in-scope customer-service Helplines and numbers of staff answering calls	List of main existing customer service helplines	Y/N	Available data passed to sponsor and shared with head of IS
<b>Objective 3</b>	Deliver solution to allow remote operation of telephone Helplines			
Deliverable D3.1	Review and report on any security and operational issues associated with preferred solution	Document known security issues, risks and solutions.	Y	Risk accepted by ITI Director and approved by CISO
Deliverable D3.2	Preferred solution confirmed	Document recommended solution(s) for stakeholders	Y	<a href="#">Telephony web pages updated</a>
Deliverable D3.3	Preferred solution configured, packaged and available for local install	Solution(s) packaged	N	SP350 packaged, 3CX licence not suitable for packaging
Deliverable D3.4	Preferred solution tested by early adopters	Successful testing completed.	Y	Testing by Finance and Estates
Deliverable D3.5	Deployment plan for preferred solution approved	Plan approved	Y	To be deployed on case by case basis upon user request
Deliverable D3.6	Service Handover Checklist Completed	Checklist completed	NA	
<b>Objective 4</b>	Provide Guidance for Staff			

Deliverable D4.1	Update and/or create documentation re use of mobile phones for business use	Documentation signed off by senior user and published	Y	<a href="#">Telephony web pages updated</a>
Deliverable D4.2	Update and/or create documentation for updating staff phone voicemail messages	Documentation signed off by senior user and published	Y	<i>Telephony web pages updated</i>
Deliverable D4.3	Update and/or create documentation for softphone users and customer-service helpline managers	Documentation signed off by senior user and published	Y	<a href="#">Telephony web pages updated</a>
Deliverable D4.4	Review and update service support documentation for ISG Helpline staff	Documentation signed off by ISG helpline	NA	<a href="#">Telephony web pages updated</a>
<b>Objective 5</b>	Investigate integration of remote telephony with Teams			
Deliverable D5.1	Investigation of integration of remote telephony with MS Teams	Investigation completed	Y	
Deliverable D5.2	Proposal for future integration of remote telephony with MS Teams including initial estimates of costs	Proposal accepted.	NA	Superseded by wider business case.

	User/Owner	MoSCoW	Set By	Achieved Y/N
Provide solution to allow staff working remotely to answer telephone calls to customer support/Helpline	David Graham	M	Project Sponsor	Y
Solution allows set up of must-have customer-service helpline requirements	David Graham	M	Project Sponsor	Y
Provide user documentation to staff using solution	David Graham	M	Project Sponsor	Y
Solution can be used by staff for answering calls	David Graham	S	Project Sponsor	Y

to their own individual numbers				
Solution should be low cost or no cost	Tony Weir	S	Project Sponsor	Y
Solution should allow retention of some working office phones	David Graham	S	Project Sponsor	Y
Understanding of how telephony might be integrated with MS Teams	Tony Weir	C	Project Sponsor	

## Benefits

1. Customers will be able to contact advertised Helpline numbers
2. Inappropriate calls to Helpline will be reduced
3. Calls can be answered in a timely fashion by the right team
4. Staff will be able to answer telephone calls to their own advertised numbers
5. Planning for future integration of Telephony with MS Teams will be informed

## Budget

Build:

CIS: 50 days

Project Management: 50 days