CallScripter

revolutionising your customer communications

CallScripter Project Process

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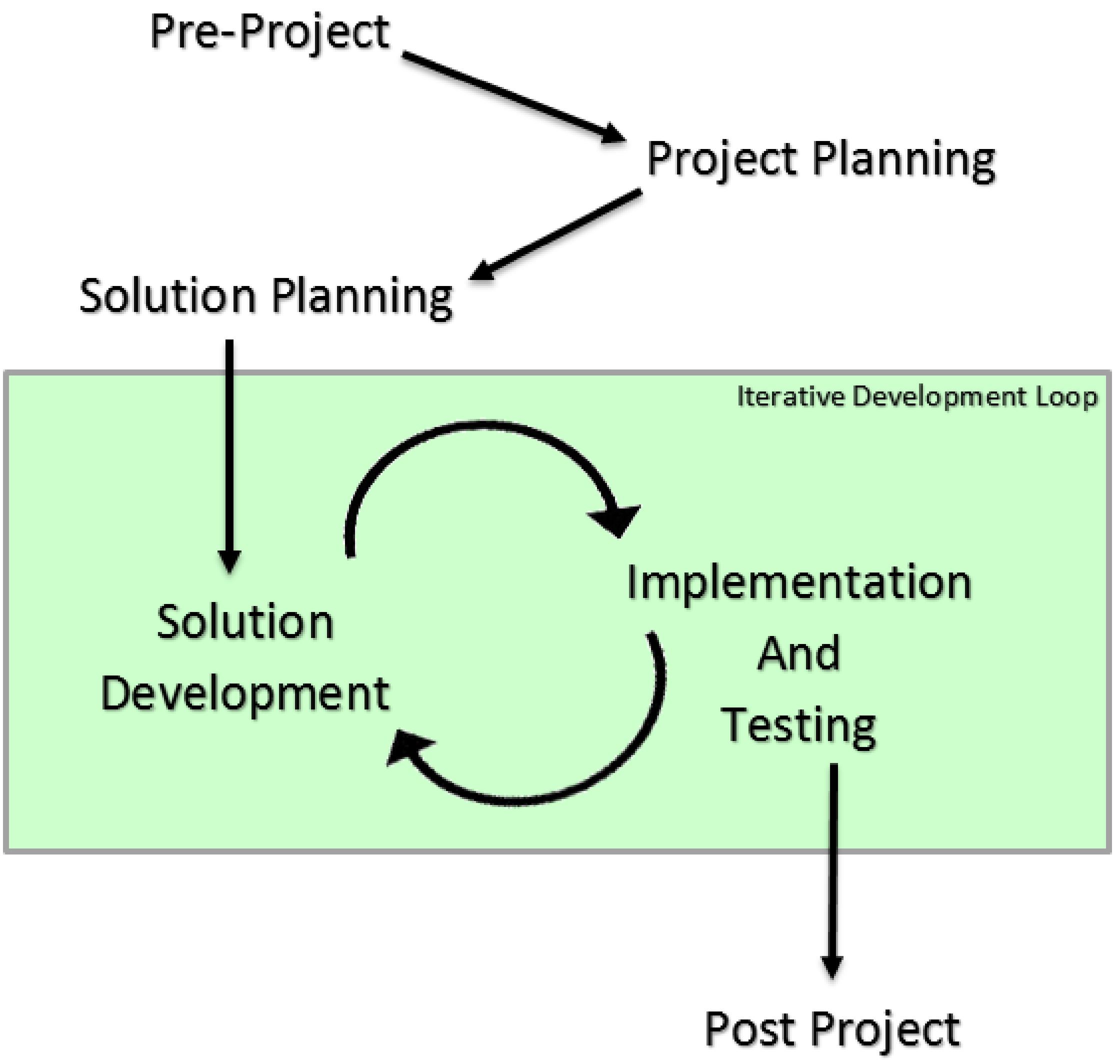
Process Flow



Project Approach

This process is based on the Agile DSDM framework, please see the website below for further details on this framework.

https://www.agilebusiness.org/resources/dsdm-handbooks/the-dsdm-agile-project-framework-2014-onwards

Pre-Project Phase

Get Requirements

Requirements may be conceptual or detailed at this stage, and they will be further developed as the project progresses. Some customers may have all the documentation that describes the project requirements already, however on occasions it might be necessary to have a discussion with the customer where we advise on the type of information we require. This step may be carried out solely by the Account Management team but could also include some involvement by the Professional Services Team.

Review Requirements

Review the high-level customer requirements, this will most likely require a discussion with the customer to further understand what the requirements are. The requirements will need to be developed so we can sufficiently understand the project to provide the Initial Estimate.

Project Feasibility

Review whether the project is feasible.

- Is it technically possible to provide the solution?
- Will the cost of delivering the project outweigh the benefits?
- Is it possible to complete the work by the requested completion date?
- Are enough resources available to deliver the project on time? Consider that the number of hours quoted to complete the work could be very different to the amount of time it will take to develop the solution depending on the availability of team members during that period.

Initial Estimate

Provide an initial estimate for the time required to deliver the project, at this stage this should always be a range as not enough information is known about the project to provide an accurate estimate. For example, an estimate within this phase of the project might be 20-30 hours and then in a later phase the estimate is more accurate and would then be a smaller range, say 22-25 hours.

Project Planning Phase

Explain Approach to Customer

Discuss the approach that is being used with the customer, it is important they understand and accept the approach that is being used. The solution development phase relies on constant communication between the team developing the solution and the customer. If the approach is not committed to by all parties, this can put the project itself at risk.

Script Building only: Part of the approach that also needs to be explained to the customer, is that each requirement should be prioritised into the categories using MoSCoW prioritisation (see below). We will aim to deliver all the requirements, however should the on-time delivery of the project be put at risk then some features may need to be de-scoped (note that this will not be relevant to an installation or an upgrade project, as the feature list will be very short, e.g. upgrading CallScripter is the aim of the project and this is either completed or not). It should be explained to the customer that this process builds contingency into the project and should deliver the minimum subset of the requirements on time and on budget.

MoSCoW categories:

- MUST have
- SHOULD have
- COULD have
- WON'T have (this time, the feature may be included in a future release/project)

Send Project Checklist

Send a copy of the New Project Checklist document (link provided below) to the customer to the customer for completion. This document can be downloaded from the below location. This document is also publicly available, as our partners may find this information useful.

https://files.callscripter.com/Documentation/New Project Checklist.docx

Solution Planning Phase

Create Trello Board

A Trello board should be created for the project and an invite sent to all relevant parties, including the customer. A copy of the Trello Project Template should be used to start with, certain projects may require a slightly different format but this is the suggested format and includes several of the steps included in this document.

Each card created will represent either a requirement of the project or an issue that has been raised. An individual requirement can be broken down to smaller segments if required, this can be done by creating a checklist within the card or if necessary break a requirement down into separate cards. At this stage, all cards will be in the To Be Scheduled list, during the Solution Development phase progress can then be tracked by reviewing which requirements are currently being worked on or have been completed.

Prioritise Requirements (Script Building Only)

Once all requirements have been added to Trello, these requirements and sub-requirements can then be prioritised due to their importance to the solution. When prioritising requirements, it is important that a focus is placed on the business need of the customer. This should be a discussion between the team that will be developing the solution and the customer however in the end the customer will decide on the priority assigned to each requirement. Once a decision has been reached, a label will be added to each Trello card saying if this is a Must, Should, Could or Won’t have requirement.

Create a Flow Diagram (Script Building Only)

Based on any documentation or information provided by the customer so far, a flow diagram will be created using the code2flow software. This flow diagram is used to show a page by page layout of the script and should show the logic contained within each page of the script. This process helps the team build an understanding of the solution that needs to be created, it also helps to raise any questions to the customer as early as possible.

Once an initial flow has been created, this should be sent to the customer for review and any misconceptions updated. This will repeat until the customer agrees that the script flow is correct, it is important this feedback is received as the script flow will be used as the basis of the script build. Any issues with the flow that are not picked up at this stage could lead to delays in the Solution Development phase. If the flow of the script is very complex, it may be required to create an appended flow that relates to one small section of the flow making the script flow easier to follow. The flow diagram along with the Trello board will from the main documentation of the solution.

Customer must sign off the script flow before the Solution Development phase can begin.

Produce a Quote

Now that more information is known about the solution, a more accurate estimate of the work required to deliver this solution can be given. It should be possible to estimate the time to deliver each requirement in 3 bandings based on different scenarios for the development; Ideal, Expected and Problematic.

- Ideal is when the requirement should be delivered if nothing significant affects completion, and the process runs smoothly throughout.
- Expected is when the requirement should be delivered with minor issues found during development, and a “normal” share of requirement refinement during development.
- Problematic is when the requirement should be delivered if significant issues arise, such as following significant revisions of the requirement during development, or the discovery of significant technical challenges.

The expected estimate for each requirement can be totalled together to provide the total estimate. The Ideal and Problematic estimates are used to help gauge risk and potential time/resource considerations should major issues occur, and additionally during the review stages of the project. Estimates should be gathered from the individuals who are due to be completing the required work, as they have the experience to give the most accurate assessment of the work that is required. Ideally the estimate given at this stage of the project should still be a range of hours, as not all details about the solution is currently known (the rest of this details will be discovered in the Solution Development Phase); however, it is likely that a single value will be required. A quote for the project can now be produced and submitted to the customer for approval.

Consider Resource Availability

At this stage of the project, the customer will have defined a due/delivery date for the project and an estimate of the number of hours to deliver the solution will have been given to them. The team that will be delivering the solution are likely to have other responsibilities that still need to be met for the duration of the project. Can enough time be spent on this project by each member of the team to deliver the project on time? This must consider that members of the Professional Services team provide support to existing customers, and urgent support requests would take priority over project work.

Ensure that contingency is being built into the resource availability to reduce the risk of the solution not being delivered on time. Do more resources need to be assigned to the project to allow the project to be delivered on time? If so, this does not mean spending more time completing the project but more members of the team working on the project.

Solution Development Phase

The below are concepts that should be applied throughout this phase rather than one off tasks that needed to be completed, other than Review Script logic and Additional Documentation. It is recommended that a solution development phase should not last longer than 2-4 weeks, therefore for bigger projects the solution should be split into development phases. The CS Time Tracker App will be used to track the exact time spent on the Project by all member of the Professional Services team, a new Project will need to be added on the Time Tracker app.

Feedback/Communication

Always request regular and early feedback from the customer as the solution is being developed, this could be a screen-share or meeting to show the customer what has been developed so far. This gives both content developers and the customer the confidence that the correct solution is being developed. If a misunderstanding earlier on in the process has led to the incorrect solution being developed, the earlier you can find this out the better, and it is less likely that this will impact the timely delivery of the solution. These workshops will generally be carried out via the use of screen-sharing software along with a conference call.

Testing

It is important that as the development of the solution progresses that constant testing of individual features and the entire solution is carried out. This can lead to early discovery of any bugs and give more time for these bugs to be resolved. As any large issues that are found may either impact the delivery of the project or affect other parts of the solution, it is critical that they be identified and escalated as early as possible. Testing is also carried out in the Implementation phase of the project, but this does not mean that testing can be skipped in the development phase; more testing at this stage should reduce the number of bugs found in the implementation phase, when the effort and impact of fixing them is likely to be greater.

It is important that any testing that is carried out, is being completed against test data that has the same complexity and comparable quantity as the live data. If this is not done, the test could be successful but the live change could experience issues during implementation.

Review Script Logic (Script Building Only)

Based on the script flow produced in the Project Planning phase, the complexity of the logic on each page of the script should be reviewed before work is started on building these pages. Any complex JavaScript code or code that will be used on multiple pages of the script should be functionised. This makes the purpose of the code easier to interpret and the solution will be more reliable, however it will also possibly make changes to the script in future more complicated/time consuming. For very complex solutions it may be necessary to create a separate Trello card related to this logic, and carry out further reviews of the logic with the customer to ensure the detail has been understood.

Prioritisation (If this process is used)

The aim of the project is to deliver all the requirements, however it may be necessary to de-scope some of the less important requirements to ensure that the project is delivered on time. First requirements that should be considered for de-scoping are the COULD have requirements followed by the SHOULD have requirements. At no point can a MUST have requirement be de-scoped from the project unless authorisation has been received from the customer. This ensures that a working solution is delivered on time and helps to build contingency into the project rather than that contingency being the project runs late and/or costs more money.

Tracking Progress

The members of the team that are delivering the solution should meet daily to have an informal discussion regarding the progress of the project. Any issues that are preventing the team members from completing their work should be raised and a plan put in place to resolve these issues. It is important that each member of the team is contributing to these meetings and can be open and honest about the progress. These meeting will often take the form of a daily stand-up at the start of each day. With each member of the team taking it in turn to spend 1-2 minutes explaining what they completed on the previous day and what they will be working on this day. The Trello board also serves to track the progress of the project. As the customer and all contributors are invited to the board everyone can view the progress of the project.

The SSRS reports that have been created to accompany the CS Time Tracker App can be used to track the time spent on the project, these are accessed through the app itself. It is possible to filter over a date range, Employee Name and name of the Project.

Discovering Detail

Not everything about the project and the solution will be known about during the Solution Planning Phase, as normally only high level discussions take place. As the solution is developed, this is when the detail of the project is further clarified. As this happens the Trello cards and the script flow should be updated to contain the additional detail. This then means that the documentation for the solution is being written as the solution is being developed, rather than writing a formal document describing the solution at the end of the project. The script flow will be signed off by the customer before work begins, and the requirements of the project would not change. However, the script flow and the solution details may change as it is being developed, therefore the script flow should be updated throughout the process to show this change.

Additional Documentation

Separate documentation in addition to the flow diagram may be required as part of the solution delivery. This would typically be a summary of key considerations, approaches or limitations covered within the Trello board. This should be a supplement to the Flow Charts, and avoid duplication.

Implementation and Testing Phase

Confirm Implementation Process with Customer

Ensure that any relevant backups are created prior to the solution being deployed, a plan should also be created should the changes need to be rolled back.

Deploy the Solution

Testing carried out by CallScripter

Ensure the solution is tested to the evolved specifications during the project.

Testing carried out by the Customer

Customer will test the solution to ensure it meets their business needs that led to the creation of the project and report any feedback to CallScripter. It is possible that this could lead to a second phase of the project or a new project to add features that were not included in the initial scope of the current project.

Deployment Review

Review the solution that has been deployed with the development team and the customer. Depending on the size and complexity of the project it may be necessary to go through multiple iterative development loops until the project is completed. For example, once phase 1 of the solution had been delivered, the project could move to solution development for phase 2, and then once this development work was completed the phase 2 solution could then be delivered. Only once all the iterative development loops have been completed can the project be completed.

Sign Off

Receive official sign-off of the solution from the customer, the solution can then be passed to the relevant support team and the project closed.

Post Project Phase

Notify Account Management Team

Advise the CallScripter Account Management team that the project has been completed so that the customer can be billed for the work completed.

Send Customer Satisfaction Survey

The CallScripter Project Satisfaction Survey has been created using Survey Monkey, the below URL should be sent out to the customer to request feedback on the project.

https://www.surveymonkey.co.uk/r/CallScripter_Project_Survey

Each question is rated from 0 to 10, any scores lower than 5 should be reviewed by CallScripter and discussed during the Project Reviews if completed in time. It is not necessary to wait for this survey to be completed before carrying out the project reviews.

Customer Project Review

A conversation involving all parties involved in the project so CallScripter, the customer and any partners. There are two main points that should be discussed;

1. How successful was the project overall?

2. Was the solution delivered what the customer expected? If it was not, it should be discussed why the solution developed in the way it did. Were the requirements misunderstood at the start of the project or did those requirements change over the course of the project?

Each Customer Project Review will have its own card within the Completed Customer Project Reviews list on the Project Reviews Trello board, with the detail of the meeting being record in the card description. If any process improvements are identified, a separate card will be created and added to the Process Improvements To Do list.

Internal Project Review

Post Project review is held between the members of the CallScripter team who contributed to the project. Using the feedback obtained from the Customer Project Review as the basis to start the conversation. The aim of this meeting is to discuss the overall success of the project and to suggest any processes that can be improved on any future projects. One member of the team will make notes on this meeting, and the details will be recorded in the Project Reviews Trello board. Each Internal Project Review will have its own card within the Completed Internal Project Reviews list and the information will be recorded in the card description. If any process improvements are identified, a separate card will be created and added to the Process Improvements To Do list.