Nurturing Process – Waterfall Deliverables – Part -1/2

Document 1- Business case document template

➢ **Why is this project initiated?**

The Callback Management System (CBMS) aims to streamline customer service operations by automating the recording, management, and follow-up of callbacks. This system will actively monitors callback promises made to customers, ensuring that every promise is adhered to and proactively managing any potential failures. By doing so, CBMS will enhance customer satisfaction, reduce complaint rates, and safeguard the company’s reputation.

➢ **What are the current problems?**

Currently we don't have a call back reminder which leads to :-

1. Keeping a manual data for callbacks,
2. High probability of missing on calling back the customers for promised call backs,
3. Impact on the customer experience,
4. Impact to the brand image if the advisors miss on call backs,
5. Increase in the number of complaints as the callbacks get missed
6. Negative survey, detriments & feedback impacting the customer satisfaction score &
7. Increased callbacks impacting the repeat call rates.

**➢ With this project how many problems could be solved?**

With this project we can solve the below stated problems:-

1. Get reminders on the organisation email id,
2. Cut down the impact of missed callbacks that could impact the brand image,
3. Increase the customer satisfaction by delivering a customer first approach by timely callbacks,
4. Reduce repeat call rates,
5. Reduce complaints elated to missed callbacks,
6. Make an efficient software to reduce manual efforts and misses &
7. Assign callbacks to fellow colleagues in case of leave of the employee.

➢ What are the resources required?

* Development team

1. Business Analyst,
2. Project Manager
3. Developers
4. Testers
5. DB architect,
6. NW architect
7. Solution architect
8. GUI designer
9. Customer Service Team: End users providing input on system functionality

* Computers and laptops,
* Microsoft office tools,
* API applications &
* Money for investment
* Updated technology for coding.

➢ How much organizational change is required to adopt this technology?

The introduction of a new system, even a beneficial one, can sometimes be met with resistance. Recognizing this, our approach to adopting the new CBMS (Customer Benefits Management System) prioritizes a smooth transition through comprehensive training and a clear understanding of its advantages.

While our employees are currently comfortable with manual data entry and reliance on call backs, we understand that embracing a new technology requires a shift in workflow. To ensure a successful and efficient adoption, we will be conducting rigorous training sessions designed to thoroughly educate all users about the CBMS. These sessions will cover every aspect of the system, from basic navigation to advanced functionalities, empowering employees to confidently leverage its capabilities.

The goal of these training sessions is to not only familiarize users with the new interface, but also to highlight the significant advantages the CBMS offers. By demonstrating how the system streamlines processes, reduces errors, and improves overall efficiency, we are confident that employees will quickly recognize the benefits and embrace its use. While initial adaptation might take some time, we anticipate a rapid increase in usage as the advantages become clear, striving for 100% adoption in a swift timeframe.

Crucially, implementing the CBMS will *not* necessitate any organizational restructuring. There are no changes being made to the core system, ensuring minimal disruption and allowing employees to seamlessly integrate the new technology into their existing roles and responsibilities.

➢ Time frame to recover ROI?

6 months post implementation.  
The advantages of the CBMS systems can be traced from Day 1 of implementation, we will need data for 2 quarters to come to an understanding about the benefits that are realised.

➢ How to identify Stakeholders?

1. **Customers:** The most important stakeholders in a call back management system are the customers. They expect to receive timely and efficient service, and a call back system can help ensure that they do. Customers also expect to be treated with respect and courtesy, so the system should be designed to provide a positive customer experience.
2. **Contact Centre Agents:** Contact center agents are the frontline representatives of the telecom company. They are responsible for handling customer inquiries and requests, including callback requests. Agents need to be trained on how to use the call back management system effectively, and they should be able to access customer information quickly and easily.
3. **Call Centre Managers:** Call centre managers are responsible for overseeing the operations of the contact centre. They need to ensure that the call back management system is working effectively and that agents are trained to use it. Managers also need to monitor the system's performance and adjust as needed to improve efficiency and customer satisfaction.
4. **IT Department:** The IT department is responsible for maintaining the call back management system and ensuring that it is integrated with other systems, such as the customer relationship management (CRM) system. They need to be involved in the design and implementation of the system to ensure that it meets the needs of the contact centre and the customers.
5. **Vendors:-** Vendors who provide call back management system solutions are also stakeholders. They need to ensure that their system meets the needs of the telecom company and that it is reliable and easy to use.

**2) BA Approach strategy: -**

a) Pre-project phase :-

* **Conduct enterprise analysis:-** SWOT analysis, Feasibility studies, GAP analysis, Root cause analysis, decision analysis, strategy analysis, business architecture framework, business case formulation & prepare BRD.
* Risk Analysis:- Conduct risk analysis ; Technical risks, operational risk,
* Planning :- BA to plan BA approach strategy , documentation to be done, communication tools to be used.
* **Conduct stakeholder analysis :-** Identify the stakeholder, stakeholder summary, stakeholder listing document & RASCI matrix.

b) Requirements gathering techniques:-

Gather requirements using elicitation techniques to understand what needs to be built.

**Brainstorming** :- Conduct a brainstorming session to understand what are the current problems faced by the employees and to find out what solution can be implemented to make the call back system hassle free

**Observing:-** Observe the user's current method of saving details for the call backs to identify gaps and what improvements can be done with the current process

**Interviews :-** conduct interviews of employees and managers to understand what is the issue they face in regard to maintaining the callback data and to understand how the call back fails impact the customer and the business.

**Workshop** :- Facilitate workshops to list down the requirements as a team activity.

**Questionnaire** :- Roll out a survey across the organisation to understand individual opinions on the current manual system and to take feedback for the new software to be developed.

**Sort the requirements** :- Sort the scattered requirements into Functional and non-functional requirements and remove duplicates

**Prioritize the Requirements** based on importance, cost, benefit, criticality using various prioritization techniques.

**Validate the requirements** using FURPS, CUCV, SMART and other techniques.

* **Stakeholder analysis RACI/ILS:**

**Project stakeholders:**

**·** Business Analyst: Rushabh Thakkar

· PM: Mr. Reetesh Govindan

· Delivery head: Mr. Jafir Lodhia

· Development team: Ms. Juhi, Mr. Teyson, Tucker, Bravo & Ms. Lucy

· Testing team: Mr. Jason & Ms. Alkeya

· Network Admin: Mr. Mike

· DB Admin: Mr. John

**Business Stakeholders:**

**· Project Sponsor: Mr. Abhishek Basu**

**· Influencers: Contact centre users**

**· Project head: Mr. Adolfo**

**· Financial head: Ms. Sia Shah**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Position** | **\*** | **R** | **A** | **S** | **C** | **I** |
| **Ultimate signatory** | **Responsible** | **Accountable** | **Supporting** | **Consulted** | **Informed** |
| **Mr. Abhishek Basu** | Project Sponsor | Yes |  |  |  | Yes | Yes |
| Mr. Rushabh | BA |  | Yes |  |  |  |  |
| Mr. Reetesh Govindan | PM |  |  | Yes |  |  |  |
| Ms. Sia Shah | Finance lead |  |  |  | Yes |  |  |
| Mr. Jafir Lodhia | Delivery Head |  |  |  | Yes | Yes | Yes |
| Contact centre users | Influencers |  |  |  |  | Yes |  |

* **Documents to write:**

1. BRD: Business requirement document

2. In-scope features/services

3. Out of scope features/Services

4. Business case document

5. Solution architect diagram

6. RTM (Requirement traceability matrix)

7. SRS (Software requirements specification)

8. FRD: Functional Requirements documents

9. Product backlog

10. Project timeline,

11. Change tracker,

12. Change request log,

13. User manuals

14. Project closure document

15. Client acceptance form

* **Process to follow to sign off on documents:**

Project signoff is typically executed during the contract closure phase. The company presents the results of the work done to the client and then after getting the necessary acceptance should get a client statement to verify that the job was completed.

The process will go through Requirements gathering, requirements management , design, coding, testing and post the testing phase we will update the project closure document . Post this, the RTM and end user manuals will be updated and forwarded to the client for a sign off before the deployment and implementation phase.

1. Project Details,

2. Relevant Delivery dates

3. Detail budget status,

4. Goals

5. Project deliverables

6. Create a comment section

7. Make signature and date sections.

* **How to take approvals from the client:**

· Whenever we need to take approval from the client we need to draft an approval letter. This is a in house project and hence does not need an approval from the clients but rather need approval from the project sponsor.

· This approval letter request is sent over an email, keeping in copy all the relevant stakeholders.

· Write an email addressing the relevant signatory and reviewers as per the below format.

*Dear Abhishek,*

*I am sending this request to seek your approval for the recent project proposal that I discussed earlier in the meeting today.*

*The team and I together have put a detailed plan that is attached to this email. After receiving your approval, we will commence with the project immediately. You will find this plan beneficial for several reasons for a callback management system.*

*The project will be achieving the following milestones:*

* *The application should allow users to login using their email id & password.*
* *The users should be able to reset their password by a forget password link on their email,*
* *The users should be able to add details about their callbacks to be made along with the option to select date & time,*
* *Managers should get a complete view regarding the call backs for their entire team.*
* *Managers and employees to get a notification regarding the call back status 1 hour before the scheduled call back.*
* *Managers should be able to assign the call backs to other employees in case the employee falls sick or is on leaves.*
* *In case of a failed call back for more than 24 hours, a stinker email should be shared to the employee along with the team manager.*

*I anticipate this project to be completed successfully. Our entire team looks forward to working on the project.*

* **What communication channels to establish and implement?**

**·** Face to face communication

· Video conferencing

· Phone calls

· Emails

· Online messaging platforms (Teams & Skype)

* **How to handle change requests :-**

Answer) **What is a Change request :** Change requests are when a stakeholder, either a client or an internal team or department, requests a change to the processes or deliverables that had already been decided upon in the project scope.

As a BA, I would analyse the request and clarify the stakeholders exactly what the request is asking us to do in the Call Back Management system. In a normal scenario, as a BA, I would first do the Feasibility Test, to check, how feasible it is to change the current ongoing project with the new change request. Post the feasibility Test, I will conduct Impact analysis and then effort estimation.

Therefore, as a BA the below steps to change the project as per the client’s requirements: -

o Document the Change request.

o Look for any Supporting materials to help in adding this Change.

o Need to assess, whether the Change is an Inside or Outside scope.

o BA and PM should ensure whether the change is a minor or a major change. If the change is a major change it will not only impact the project budget but also the scope and the delivery times.

o Fill the Change request Form (CRF) and get the approval from the Project Manager.

o We also need to ensure that our Team understands the priority of this change request.

o We also need to discuss the change with Change Control Board (CCB) who will recommend the necessary change on the Project.

o Once this change is approved, the project deliverables will need to be updated. This can include plans and schedules, business process documents, and the requirements documents.

o Once these updates have been made, the project manager can communicate the new course of action to everyone who will be impacted. Now you can delegate the necessary tasks to the people in charge of implementing these new changes

**How to take signoff on the UAT – Client project acceptance form :-**

UAT (User Acceptance Testing) is a crucial phase in the software development life cycle where the intended users of the system validate the software by testing it in a real-world or production-like environment. The primary goal of UAT is to ensure that the software meets the business requirements, functions as expected and is ready for deployment to the end users. To handle the situation of testing the final product and successfully completing it, the business analyst can follow these steps:

1. UAT Planning: Prepare a plan for User Acceptance Testing (UAT) in consultation with the client. This plan should include the scope of testing, test scenarios, testdata, and timelines.

2. Test Environment Setup: Ensure that the required test environment is set up and available for the client to perform testing. This may include providing access to the testing environment, necessary test accounts, and any additional resources needed for testing.

3. Test Execution: Coordinate with the client to execute the planned test scenarios. Monitor the testing progress, provide support for any questions or issues that arise and track the test results.

4. Defect Management: If any defects are identified during UAT, work closely with the client to understand the issues, document them, and track their resolution. Collaborate with the development team to address the reported defects and verify their fixes.

5. UAT Sign-off: Once the client has completed testing and is satisfied with the product’s functionality, obtain their formal sign-off or approval which includes RTM and closure documents. This indicates that the client has accepted the final product and is ready to move forward with its deployment.

**Document 3- Document 3- Functional Specifications :-**

|  |  |
| --- | --- |
| Project name | Call back management system |
| Customer name | Capita India |
| Project Version | V2.2 |
| Project Sponsor | Mr. Abhishek Basu |
| Project Manager | Mr. Reetesh Govindan |
| Project Initiation Date | 08/03/2025 |

|  |  |  |  |
| --- | --- | --- | --- |
| Req id | Req name | Description | Priority |
| FR001 | Login | User should be able to login using his organisations email id | 10 |
| FR002 | Add cx details | User should be able to enter customer details to schedule a call back | 10 |
| FR003 | Reminder notification | User to get a reminder email 1 hour before the scheduled call back | 10 |
| FR004 | Manager dashboard | Manager should be able to view all the call backs scheduled by the team | 10 |
| FR005 | Assign Callbacks | Manager should be able to assign the call to other users in case the concerned user is not present on the call back date | 10 |
| FR006 | Adding notes | Employees should be able to add notes to state the outcome of their callbacks | 9 |
| FR007 | Password reset | Employees should be able to reset their password in case they forget the password | 9 |
| FR008 | Stinker email | In case there is no action taken on the call back date and time, a stinker email to be shared with the manager and the employee regarding the miss of call back | 9 |
| FR009 | Reschedule option | In case the customer answers the call and schedules a different time for call back, the employees should get an option to reschedule the callback | 8 |
| FR010 | Admin access | Operations manager to have an option to change the manager details if there is any changes in the team structure | 7 |

Document 4 :- Requirement Traceability Matrix

Answer) RTM requirement traceable Matrix plays a vital role as it showcases the progress and the status of the project; it contains high level documents which shows us the information on the project data

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Req Name** | **Req Description** | **Design** | **D1** | **T1** | **D2** | **T2** | **UAT** |
| **FR001** | **Login** | **User should be able to login using his organisations email id** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR002** | **Add cx details** | **User should be able to enter customer details to schedule a call back** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR003** | **Reminder notification** | **User to get a reminder email 1 hour before the scheduled call back** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR004** | **Manager dashboard** | **Manager should be able to view all the call backs scheduled by the team** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR005** | **Assign Callbacks** | **Manager should be able to assign the call to other users in case the concerned user is not present on the call back date** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR006** | **Adding notes** | **Employees should be able to add notes to state the outcome of their callbacks** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR007** | **Password reset** | **Employees should be able to reset their password in case they forget the password** | **Completed** | **Yes** | **Yes** | **Yes** | **Yes** | **Completed** |
| **FR008** | **Stinker email** | **In case there is no action taken on the call back date and time, a stinker email to be shared with the manager and the employee regarding the miss of call back** | **Completed** | **Yes** | **Yes** | **Yes** | **No** | **Pending** |
| **FR009** | **Reschedule option** | **In case the customer answers the call and schedules a different time for call back, the employees should get an option to reschedule the callback** | **Completed** | **Yes** | **Yes** | **Yes** | **No** | **Pending** |
| **FR010** | **Admin access** | **Operations manager to have an option to change the manager details if there is any changes in the team structure** | **Completed** | **Yes** | **Yes** | **Yes** | **No** | **Pending** |

Document 5 : -Business Requirement Document

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1. Document Revisions :-

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| --- | --- | --- |
| Date | Version number | Document changes |
| 01/03/2025 | 0.1 | Initial Draft |
| 02/03/2025 | 0.2 | Stakeholders identify |
| 03/03/2025 | 0.3 | Requirements elicitation |
| 07/03/2025 | 1.1 | In scope functionalities modified |
| 08/03/2025 | 1.2 | Out of scope functionalities modified |
| 12/03/2025 | 1.3 | Risks identified |
| 16/03/2025 | 2.1 | To-be system in place |
| 23/03/2025 | 2.2 | Related documents uploaded |

2. Approvals

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | Name | Title | Signature | Date |
| Project sponsor | Mr. Abhishek Basu | BRD | AB | 09/03/2025 |
| Business Owner | Mr. Adolfo | Project scope | AA | 12/03/2025 |
| Project Manager | Mr.Reetesh Govindan' | Backlog list | RG | 12/03/2025 |
| System architect | Mr. Ahatsham Ahmad | System design | AA | 16/03/2025 |
| Development lead | Mr. Ronak Bhatia | Prototype | RB | 19/03/2025 |
| User experinece lead | Ms. Himani Nautiyal | UAT Testing | HN | 21/03/2025 |
| Quality lead | Mr. Amaan Pardeshi | Quality control | AP | 22/03/2025 |
| Content lead | Zeenat Khan | Content | ZK | 23/03/2025 |

3. RACI Chart for This Document

The RACI chart identifies the persons who need to be contacted whenever changes are made to this document. RACI stands for responsible, accountable, consulted, and informed. These are the main codes that appear in a RACI chart, used here to describe the roles played by team members and stakeholders in the production of the BRD. They are adapted from charts used to assign roles and responsibilities during a project.( RACI Can be made for IT side[Project stakeholder] as mentioned above, apart from that Can also Be made for Client side[Business Stakeholder]).

The following describes the full list of codes used in the table:

Codes Used in RACI Chart

\* Authorize Has ultimate signing authority for any changes to the document.

R Responsible for creating this document.

A Accountable for accuracy of this document (for example, the project manager)

S Supports Provides supporting services in the production of this document

C Consulted Provides input (such as an interviewee). I Informed Must be informed of any changes.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Position** | **\*** | **R** | **A** | **S** | **C** | **I** |
| **Ultimate signatory** | **Responsible** | **Accountable** | **Supporting** | **Consulted** | **Informed** |
| **Mr. Abhishek Basu** | Project Sponsor | Yes |  |  |  | Yes | Yes |
| Mr. Rushabh | BA |  | Yes |  |  |  |  |
| Mr. Reetesh Govindan | PM |  |  | Yes |  |  |  |
| Ms. Sia Shah | Finance lead |  |  |  | Yes |  |  |
| Mr. Jafir Lodhia | Delivery Head |  |  |  | Yes | Yes | Yes |
| Contact centre users | Influencers |  |  |  |  | Yes |  |

4. Introduction

4.1. Business Goals : -To deliver world class customer service to all our clients by ensuring that we are the most preferred partners across the globe. While doing so, we need to ensure that we are on top of our KPIs and KRAs and profitable as a business.

4.2 Business Objectives :-

To ensure that we are on top of our KPIs and KRAs and are the most preferred partners for our clients around the globe.

4.3 Business Rules

1. Integrity : To be righteous and perform the right things with the right conduct and mindset
2. Transparency : To be transparent with our employees so they know what we are aiming as a business
3. People centricity : Our employees are our most valued asset
4. Top end delivery : We deliver the best customer service
5. Diversity and inclusion : We employ humans and do not discriminate on the basis of caste, creed, sex ,religion , colour & nationality

4.4 Project background:-

**We did not have a call back reminder which led to :-**

1. Keeping a manual data for callbacks,
2. High probability of missing on calling back the customers for promised call backs,
3. Impact on the customer experience,
4. Impact to the brand image if the advisors miss on call backs,
5. Increase in the number of complaints as the callbacks get missed
6. Negative survey, detriments & feedbacks impacting the customer satisfaction score &
7. Increased callbacks impacting the repeat call rates.

Hence we have come up with this project.

4.5 Project Objective :-

Have a unified software for callback management that will help with to :-

1. Get reminders on the organisation email id ,
2. Cut down the impact of missed callbacks that could impact the brand image,
3. Increase the customer satisfaction by delivering a customer first approach by timely callbacks,
4. Reduce repeat call rates,
5. Reduce complaints elated to missed callbacks,
6. Make an efficient software to reduce manual efforts and misses &
7. Assign callbacks to fellow colleagues in case of leave of the employee.

4.6 Project scope:-

To develop a callback management system which can help the business to manage promised call backs and reduce the impacts of missed call backs.

4.6.1 In scope functionality :- The application should allow users to login using their email id & password.

* The users should be able to reset their password by a forget password link on their email,
* The users should be able to add details about their callbacks to be made along with the option to select date & time,
* Managers should get a complete view regarding the call backs for their entire team.
* Managers and employees to get a notification regarding the call back status 1 hour before the scheduled call back.
* Managers should be able to assign the call backs to other employees in case the employee falls sick or is on leaves.
* In case of a failed call back for more than 24 hours, a stinker email should be shared to the employee along with the team manager.

4.6.2 : - Out of scope functionality :-

* The CBMS will not be integrated with the CRM directly.
* There is no register option , as all the active employees will automatically be enrolled to the CBMS.

1. Assumptions:-
   1. The organisation has a MIS team that will be working on maintaining the employee data for granting access.
   2. All employees are aligned to their respective team managers,
   3. The team has highly technical resources.
2. Constraints: -
   * 1. CRM Integration
     2. Automatic employee data
3. Risks :-

A risk is something that could affect the success or failure of a project. Analyze risks regularly as the project progresses. While you may not be able to avoid every risk, you can limit each risk’s impact on the project by preparing for it beforehand. For each risk, you’ll note the likelihood of its occurrence, the cost to the project if it does occur, and the strategy for handling the risk. Strategies include the following:

• Avoid: Do something to eliminate the risk.

• Mitigate: Do something to reduce damage if risk materializes

• Transfer: Pass the risk up or out to another entity.

• Accept: Do nothing about the risk. Accept the consequences.

i) Technological Risks :-

* Outdated system,
* Software License cost,
* Unfriendly technology

ii) Skills Risks :-

* Lack of familiarity with the domain,
* Less qualified developers and testers,
* Un disciplined employees,

iii) Political Risks: -

Currently there are no political risks as this is a in house project

iv) Business Risks: -

* If the project is cancelled, then the number of complaints will see a rise as the company grows.
* The customer satisfaction scores will be impacted,
* Complaints and detriments will increase &
* The companies brand image will be impacted.

v) Requirements Risks:- If the requirements are not gathered properly then ,

* The software may not meet the organisations need,
* The team may need to work on the product for a longer time,
* The duration for the project will increase,
* The application will not be made as per the expectations.

vi) Other Risks: -

* Budget risk,
* Communication gaps,
* Employees leaving midway,
* Conflicts between employees,
* Inefficient processes: Poorly designed or outdated workflows can lead to delays, rework, and resource waste.
* Lack of clarity: Ambiguous project documentation or unclear roles and responsibilities can result in misinterpretations and deviations from the plan.
* Communication breakdowns: Poor communication between team members, stakeholders, or departments can lead to misunderstandings and critical information being missed.
* Change management issues: Improper handling of project changes can create disruption and impact the overall process.
* Technical limitations: Reliance on outdated technology or inadequate tools can hinder project progress.
* Quality control gaps: Insufficient quality checks during the project execution can lead to defects and rework later on.
* Inefficiencies with the features for proposed project
* Unfriendly/complicated application
* Training the users who are used to the old ways of call backs.

1. Business Process Overview :-

* Pre Project analysis
* Requirements Gathering,
* Requirements analysis,
* Design,
* Coding &
* Deployment and implementation

8.1. Legacy System (AS-IS) :-

**Currently we don't have a call back reminder which leads to :-**

1. Keeping a manual data for callbacks,
2. High probability of missing on calling back the customers for promised call backs,
3. Impact on the customer experience,
4. Impact to the brand image if the advisors miss on call backs,
5. Increase in the number of complaints as the callbacks get missed
6. Negative survey, detriments & feedbacks impacting the customer satisfaction score &
7. Increased callbacks impacting the repeat call rates.

8.2. Proposed Recommendations (TO-BE) :-

Have a unified software for callback management that will help with to :-

1. Get reminders on the organisation email id ,
2. Cut down the impact of missed callbacks that could impact the brand image,
3. Increase the customer satisfaction by delivering a customer first approach by timely callbacks,
4. Reduce repeat call rates,
5. Reduce complaints elated to missed callbacks,
6. Make an efficient software to reduce manual efforts and misses &
7. Assign callbacks to fellow colleagues in case of leave of the employee.
8. Business Requirements :-

|  |  |  |  |
| --- | --- | --- | --- |
| Req id | Req name | Description | Priority |
| BR001 | Login | User should be able to login using his organisations email id | 10 |
| BR002 | Add cx details | User should be able to enter customer details to schedule a call back | 10 |
| BR003 | Reminder notification | User to get a reminder email 1 hour before the scheduled call back | 10 |
| BR004 | Manager dashboard | Manager should be able to view all the call backs scheduled by the team | 10 |
| BR005 | Assign Callbacks | Manager should be able to assign the call to other users in case the concerned user is not present on the call back date | 10 |
| BR006 | Adding notes | Employees should be able to add notes to state the outcome of their callbacks | 9 |
| BR007 | Password reset | Employees should be able to reset their password in case they forget the password | 9 |
| BR008 | Stinker email | In case there is no action taken on the call back date and time, a stinker email to be shared with the manager and the employee regarding the miss of call back | 9 |
| BR009 | Reschedule option | In case the customer answers the call and schedules a different time for call back, the employees should get an option to reschedule the callback | 8 |
| BR010 | Admin access | Operations manager to have an option to change the manager details if there is any changes in the team structure | 7 |
| BR011 | Load time | The page should have a 0 seconds refresh rate | 6 |
| BR012 | Resources | The team should have updated systems to work on | 6 |
| BR013 | Testing space | There should be space allotted for sandbox testing. | 7 |
| BR014 | Communication tools | Communication tools like teams, outlook and other to be licensed . | 7 |

10.Appendices

10.1. List of Acronyms :-

a) CX – customer,

b) No .of calls :- number of calls.

c) Ob call:- outbound call

d) RACI :- Responsible, Accountable, Consulted, informed

10.2. Glossary of Terms

10.3. Related Document