



Consistent Answers

~ RELEASE 1 ~

Telephony Deployment Plan

Guidelines for a Smooth Transition

DRAFT



**FEDERAL
STUDENT AID**

April 2002



Overview

The goal of **Release 1** is to consolidate several student channel 800 numbers into 1-800-4-FED-AID. This release will achieve two goals:

- Functional routing
- Warm transfers between FSAIC, DCSIC, LS, and LC

The **Deployment Plan** for this release will help ensure a smooth transition for customers and Operating Partners through:

- Program management procedures, including a communication plan; weekly status reports; issues management guidelines; and marketing recommendations for publishing the new number (1-800-4-FED-AID) and retiring old 800 numbers
- A Release 1 schedule with key requirements, development, testing, pilot, and deployment milestones
- Regular working sessions with Operating Partners, Vendors, and appointed Release 1 FSA Representatives to establish requirements and design
- Training guidelines for call center agents
- A pilot plan with go/no-go metrics that drive implementation
- A go-live plan with post-production support and exit criteria

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Requirements
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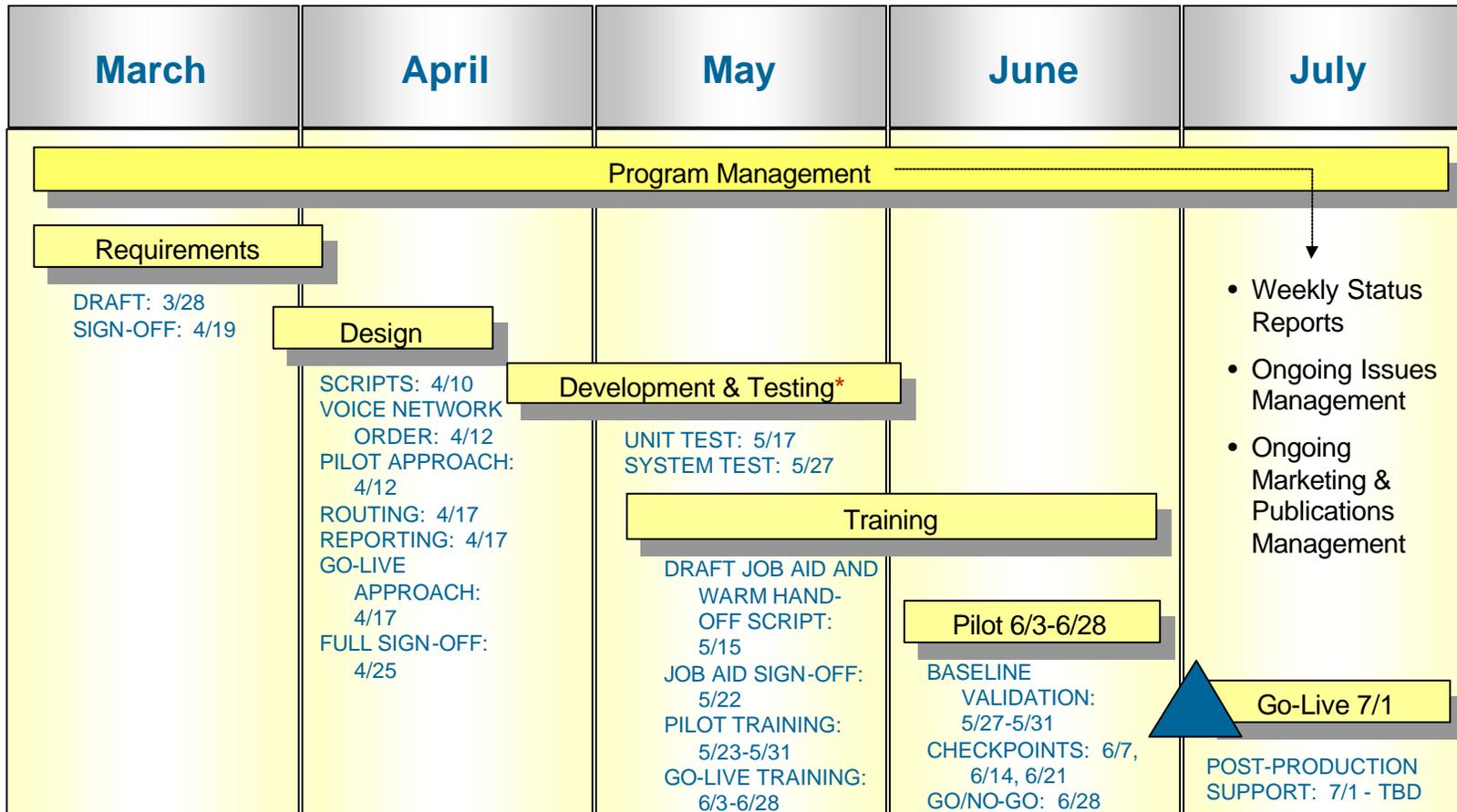
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Release 1 Schedule

Milestones for Release 1 by phase appear below.



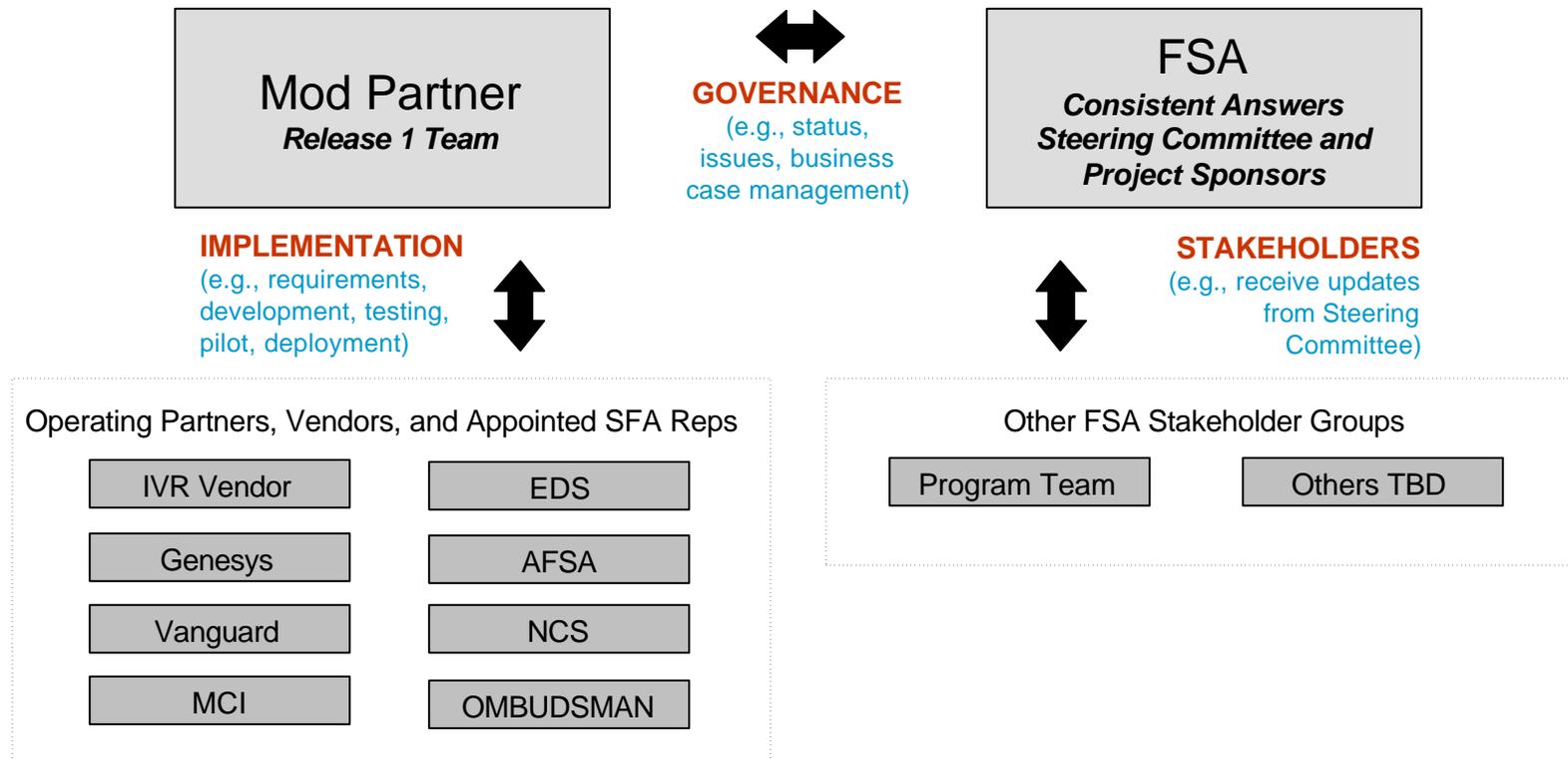
- Weekly Status Reports
- Ongoing Issues Management
- Ongoing Marketing & Publications Management

***Test plans, production issue resolution, and escalation procedures for Go-Live will be formulated and distributed separately.**



Program Management

Program management processes will help ensure that communications* are handled effectively for Release 1. The Consistent Answers program management structure will be organized as follows:



*See Communication Plan for document distribution guidelines to individuals.

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- Program Management**
- Status Reports
- Issues Management
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Status Reports

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Distribution List

Weekly Release 1 status reports will be distributed every Friday (beginning 4/5) to:

- FSA Steering Committee and Project Sponsors
- Operating Partners, Vendors, and Appointed SFA Release 1 Representatives (e.g., Ombudsman)

Content

Each status report will contain the following information:

- High-level accomplishments for current week
- High-level plans for next week
- Key issues
- Milestone dates and status

Guidelines

Questions about a given status report should be directed to the Release 1 team. *(Contact information will be provided on each report.)*

To have individuals added to the distribution list, contact the Release 1 team.



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Issues Management (Design and Development)

Process

When issues of high or medium priority are raised during working sessions, Release 1 team logs them using the eProject tool:

<https://modpartner.eproject.com>

For each issue, several variables are captured:

- Priority
- End Date
- Owner
- Status

Viewing

Issues can be viewed one of two places:

- eProject
- Weekly status report

Updating & Closing

On at least a weekly basis, individuals who participate in Release 1 working sessions should log onto eProject to update/close issues assigned to them.

Guidelines

If you are unable to obtain access to eProject, please contact Release 1 team.

Release 1 team will log new issues based on working sessions.



Marketing & Publications

The Release 1 team is reaching out to FSA contacts to discuss marketing and publication issues surrounding the new 1-800-4-FED-AID number.

Examples of publications that will need to be updated with the new number include:

- **FSA websites (e.g., FAFSA on the Web)**
- **Bills and loan statements**
- **Brochures and application materials**
- **School financial aid office publications**

While some publications will be relatively easy to update (e.g., websites), others are published infrequently and/or have stock that will need to be depleted. **For this reason, old 800 numbers will retire over the next 18 months (or longer period if required).**

To help drive usage of the new number, a full marketing campaign is expected to be launched by FSA in 2003. *(This is not considered in scope for Release 1.)*

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Requirements & Design

Working sessions have been scheduled through May (by phone and in person) between Mod Partner, Operating Partners, Vendors, and appointed FSA Release 1 Representatives (e.g., Ombudsman). The purpose of these sessions is to define Release 1 requirements and formulate a detailed design and implementation plan.

Key Milestones

Requirements Draft:
March 26

Requirements Sign-Off:
April 19

Script Design Draft:
April 10

Pilot Approach Draft:
April 12

Routing Design Draft:
April 17

Reporting Design Draft:
April 17

Go-Live Approach Draft:
April 17

Full Design Sign-Off:
April 25

Guidelines

As designated in the Communication Plan, individuals involved in Release 1 (e.g., Operating Partners, Vendors, and appointed FSA Release 1 Representatives) will be provided with draft requirements and design documentation approximately one week prior to sign-off deadlines.

If changes are requested, feedback should be given to the Release 1 team at least one business day prior to sign-off to ensure adequate turnaround time.

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Training

Release 1 introduces only minimal functionality requiring training. However, new default routing processes (e.g., call transfer procedures) are needed to handle callers who dial 1-800-4-FED-AID and make no selection.*

A job aid will be created by the Consistent Answers Training Team using input from Operating Partners and agent focus groups.

Key Milestones

Job Aid Draft:
May 15

Job Aid Sign-Off:
May 22

Training Schedule

Pilot Training (10%)
May 23-May 31

Go-Live Training (90%)
June 3-June 28

Job Aid Topics

- High-Level Overview of Consistent Answers
- Release 1 Changes: *What's in the New Prompter?*
- Diagnosing a Call: *Knowing When and Where to Transfer*
- New Procedures for Call Transfers (e.g, warm transfers vs. sending to the queue)

Total Estimated Time: 1 hour

GUIDELINES

- Agents will be invited to participate in focus groups to assist with Job Aid development.
- A training certification document will be provided by NCS, EDS, and AFSA for each agent who successfully completes the Release 1 Job Aid.

***See Release 1 Transfer Projections for expected volumes and impact.**

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Pilot with Go/No-Go Metrics

The Release 1 pilot will be conducted for one month prior to full deployment. Approximately 10% of incoming calls will be included. The pilot includes the following activities:



PILOT APPROACH DESIGN: A plan will be distributed with detailed information about pilot procedures, including area code selection criteria; routing; expected misdirect rate and transfer volumes; and Go/No-Go metrics with preliminary baseline values (will be verified with small sample during pilot).

(April 17)

DESIGN SIGN-OFF: Deadline for sign-off of the full detailed design document, including the pilot approach. **(April 25)**

AGENT PARTICIPANTS: NCS, AFSA, and EDS will identify a pool of agents to handle approximately 10% of total incoming calls during pilot (distributed according to expected volumes). **(May 1)**

PILOT TRAINING: NCS, AFSA, and EDS agents involved in pilot will complete Release 1 Job Aid. **(May 23-May 30)**

PILOT CHECKPOINTS: After each of the first three weeks during the pilot, Friday checkpoints will compare expected to actual metrics, and adjustments to routing will be made if needed over the weekend. **(June 7, June 14, and June 21)**

GO/NO-GO DECISION: Based on the metrics collected during the last week of the pilot, a go/no-go decision will be made. **(June 28)**

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Pilot with Go/No-Go Metrics

The preliminary go/no-go metrics for the pilot are listed below, along with baseline values. During the week of May 27-May 31, the Release 1 team will validate baseline values by analyzing call center reports and listening to calls.

ILLUSTRATIVE

Metric	Baseline	Pilot Goal
Service Level <i>Percentage of calls answered in 20 seconds or less (Goal: 80/20)</i>	TBD	<ul style="list-style-type: none"> • No statistically significant ($p < .05$) difference compared to baseline; AND • No statistically significant ($p < .05$) difference compared to non-pilot control group
Average Speed of Answer <i>Average customer wait time after exiting IVR, before speaking to a live agent (in seconds)</i>	TBD	<ul style="list-style-type: none"> • No statistically significant ($p < .05$) difference compared to baseline; AND • No statistically significant ($p < .05$) difference compared to non-pilot control group
System Availability <i>Prompter availability and Takeback and Transfer (TNT) success rate</i>	N/A	<ul style="list-style-type: none"> • Availability and TNT success rate must both exceed 98.5% during pilot
Caller Error (Misdirect Rate) <i>Percentage of callers who use the wrong 800 number or select the wrong menu option</i>	TBD	<ul style="list-style-type: none"> • Release 1 will not significantly increase the misdirect rate compared to baseline ($p > .05$).
No Selection <i>Caller uses new 1-800-4-FED-AID number and makes no selection in prompter</i>	N/A	<ul style="list-style-type: none"> • $\leq 10\%$ of callers will make no selection; Of these, $\geq 55\%$ will use old 800 number (call can be routed accordingly).



Go-Live Plan

After the go/no-go pilot checkpoint has been successfully passed, full implementation of Release 1 will occur. At that time, full-time on-site support personnel will help answer questions and address issues at the call centers.



GO-LIVE APPROACH DESIGN: A plan will be distributed with detailed information about the Go-Live approach. **(April 17)**

DESIGN SIGN-OFF: Deadline for sign-off of the full detailed design document, including the Go-Live approach. **(April 25)**

GO/NO-GO DECISION: Based on the metrics collected during the last week of the pilot, a go/no-go decision will be made. **(June 28)**

GO-LIVE TRAINING: All NCS, AFSA, and EDS agents will complete Release 1 Job Aid. **(June 3-June 28)**

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