

Genesys

Implementation Readiness

Best Practice Document

Implementation Readiness

Self-Assessment Document

Genesys

**Version:**



**Value Realization**

Genesys

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# **Introduction**

You’ve attended technology demonstrations, compared vendor offerings, narrowed the choices, made the final selection, and signed the contract with Genesys, the world’s #1 Customer Experience Platform. We are here together to create exceptional omnichannel experiences, journeys and relationships because we passionately believe that great customer engagement drives great business outcomes.

Now comes a key part – IMPLEMENTATION. Genesys Professional Services team is 100% focused on guiding you through our tested implementation process to deliver an on-time, on-budget technology solution.

We value customers who take their own preparation and planning seriously, since we know this results in higher satisfaction and better outcomes. The more your team has clarified your vision for project success, the more satisfied you will be with the results. That’s why we created this guide – to help you prepare your team for the work that’s to come. There will be 2 separate documents covering:

* What to expect from Genesys during your deployment engagement (Implementation Readiness)
* What is likely for your organization to experience and how to best deal with it (Organizational Readiness)

Read this Implementation Readiness document to learn more about how the project will progress and what you can do to prepare for your team’s participation in implementation.

* 1. How to use this guide

Planning and implementing technology to improve contact center operations and service processes requires planning. Beyond normal responsibilities, a new technology implementation requires proper project management and focus.

Consider this guide a step-by-step plan designed to fit your demanding schedule. Preparation questions and actions are organized so you can address them piecemeal, in advance, and delegate to your staff as needed. As you complete each action, you’re one step closer to designing the best center solution for your business and your customers.

**Your responsibility**

* Completing the preparation questions and actions accompanying this guide will support the overall success of your implementation to keep design and activities on schedule. Questions and actions in each section are intended to help you focus on key areas of your operation and customer care processes.
* Ultimately, the decisions you make throughout this process will help determine successful implementation and optimum performance for customer service.

**Your Action Plan**

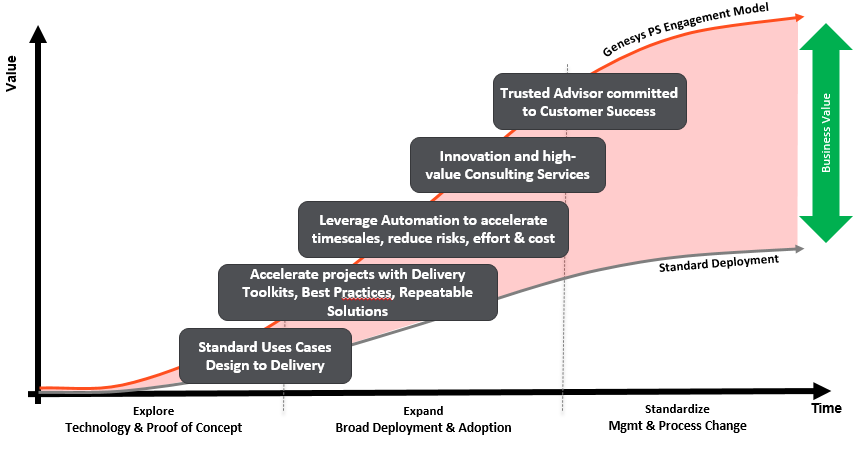
* Read the entire guide, and ask your team to do the same.
* Schedule a team meeting to discuss the questions, and complete the action items listed. Delegate action items to the appropriate team members as necessary.
* As you move through implementation phases, continue to refer to this guide.
* Remain flexible in cases where minor process adjustments might be required during implementation, but avoid major changes that might disrupt the implementation scope.
* Pay particular attention to the action items in each section. This will ensure you’re prepared to partner with the implementation team to design a system that maximizes the value of your new technology.

# **Implementation process**

The Genesys Professional Services Engagement Model is designed to maximise customer business value by accelerating time to a successful deployment and user adoption.

* Speed time-to-value
* Realization of Business Outcomes
* Mitigate risk
* Best Practice Maturity Model developed from thousands of successful deployments
* Optimization of performance and services levels

The engagement model will be tailored for each phase of the project to progressively grow from a pilot to prove the technical fit, to a larger rollout and finally to a standardized adoption of the new solution.



* 1. Methodology

The Genesys Professional Services methodology is dynamic and flexible, focused on quality and time to value for our customers. The approach and phases/sprints will be defined depending on the platform type, solutions in scope and customer specifics but nevertheless it will always follow the following simplified logical steps:

* **Initiate.** Teams are mobilized, scope is clarified and the implementation strategy is defined
* **Kick-off.** Customer and Genesys project teams get together, the next steps are agreed
* **Deliver.** The solution is being designed, built and delivered
* **Test.** User acceptance test is performed, business objectives are being met
* **Go live and beyond.** The solution is live, business value is achieved

We’ll go in detail to each of these phases in the next chapter.

* 1. Roles and responsibilities

There is one critical factor in every technology implementation – the right people in the right roles to work collaboratively, communicate clearly, and support on-time, on-target project deliverables.

Your Genesys project team is chosen based on many factors, including geography, timing, and the requirements of the project. Our goal is to select a team who will match with your organizational culture and your team. The assigned Genesys Project Manager will serve as your main point of contact and organize all other Genesys team members to support your implementation. Here is an indicative list of Genesys Professional Services roles you may interface with:

|  |  |
| --- | --- |
| Role | Responsibilities |
| **Consulting Sales Director** | Define the roadmap and estimate the effort and cost associated with the technical delivery. |
| **Program Manager** | For large and complex projects, facilitates the alignment between different workstreams and acts as main point of contact for customer stakeholders |
| **Project Manager** | Serve as the main point of contact for the customer project manager and stakeholders. Remove roadblocks to key activities.  Manage all aspects of the activities, team, and plan. Monitor individual project team member activities and progress.  Identify and schedule Genesys resources to complete the project activities.  Ensure all work delivered complies with the terms of the Statement of Work and other agreements. |
| **Technical lead** | Defines and coordinates the technical tasks for the development of the solution in line with the business requirements |
| **Business analyst** | Clarifies the scope of the project in detail and identifies any potential challenges  Understands the customer existing processes and documents the business requirements  Supports the customer in adopting the new solution and achieving the business benefits |
| **Architect** | Contributor and approver of the architecture diagram  Supervise the design of the solution ensuring viability and future proof |
| **Consultant** | Designs and builds the solution as per functional requirements |

In the following table you can find our recommendation for roles which we believe to be necessary to form a collaborative partnership with your Genesys project team. Take the time to formally assign employees to the project roles, communicate their responsibilities, and discuss how each team member will be accountable for communicating project activities and progress.

**Business Roles:**

|  |  |
| --- | --- |
| Role | Responsibilities |
| **Project Sponsor** | Provide the resources and funding needed for the implementation and remove organizational roadblocks.  Articulate the reason for this project, what the organization hopes to accomplish, and the desired return on investment. |
| Contact Center Manager/  Supervisors | Articulate contact center goals, measurements and workflow and define how new technology should be configured to support an efficient and effective workflow.  As both end users and owners of the customer experience, the contact center management team plays a critical role in the design of new contact center technology. It’s imperative that they’re involved in the selection and design of new technology to make sure it enables – and doesn’t inhibit - the right customer, agent, and manager experience. |
| Business Owners | Business owners for Customer Service, IVR, Online, Outbound as applicable to the solution purchased.  They are responsible to provide channel perspective to ensure alignment and cohesive solution design |
| Customer Experience | Provide overarching guiding principles for the expected customer experience and facilitate mediation in case of conflictual business requests. |
| Project Manager | Serve as the main point of contact for the Genesys project manager and project team. Remove roadblocks to key activities.  Manage all aspects of the activities, team, and plan. Monitor individual project team member activities and progress.  Identify and schedule company resources to fulfil project requirements, manage project acceptance, and sign-off on work completed by the Genesys implementation team as activities are done.  Ensure all work delivered complies with the terms of the Statement of Work and other agreements. |
| Business Analyst | Ensures that the solution requirements are aligned to the business objectives of the project  Keeps track of scope changes and evaluates the impact to the overall business objectives of the project  Facilitate the change in the organization and ensures all relevant stakeholders and lines of business are able to successfully effect the change |
| Trainer | Manage and deliver employee training to use the new technology, both in preparation for the initial go-live and on an ongoing basis. Work with your sales team and the project manager to determine the best training packages to support your employees across all new technology products.  This role is optional. Not every organization has a dedicated training resource. However, you will need a person assigned to coordinate training requirements and logistics. Remember to include them early and often in project planning to make sure they are prepared to support your training needs. |

**Technical roles:**

|  |  |
| --- | --- |
| Role | Responsibilities |
| Technical Lead | Serve as the main point of contact for the Genesys Technical Lead  Manages all technical activities and sign-off on the infrastructure and functional designs  Liaises internally to the rest of the technical resources to ensure preparation and timely delivery of the technical activities |
| Architect | Evaluates the impact to the environment of the new solution |
| Network | Supports with network access when required |
| Security | Advises about security compliance |
| Database manager | Required to take into support the new solution database |
| Telecommunications Admin | Manage and acquire the telecommunication resources needed for the project. Serve as main point of contact for these issues. |
| Systems Analysts | For IVR, Web and other systems impacted by the Genesys solution  Responsible to contribute with impact assessment and drive the necessary changes to the systems to facilitate the Genesys solution |
| System Administrator(s) | "Power User" responsible for daily operation, user and group administration, configuration changes, usage policies, and other ongoing system administration activities.  Earn Genesys certification and serve as the Genesys Support contact to open and manage tickets and issues. |
| Tester(s) | Participate in UAT (User Acceptance Testing) to test the health of the system prior to go-live. |

Choosing the right project team is an early decision that will have significant impact on the success of the project. Consider not only each team member’s skills and knowledge – but also their workload and timing of their contributions.

Use these questions to guide your preparation:

* Are adequate internal resources available to support a new technology implementation? What are the requirements for each project role, and do assigned employees have the bandwidth to meet project deliverables within the projected dates? Do some of their “day job” responsibilities need to be temporarily reassigned to other resources?
* Is the assigned customer project manager knowledgeable about the organization’s “project culture”? For example, has your organization completed large, complex technology implementations with members of the existing project team? Any unique roadblocks? Is the PM someone who has influence within the organization and the project team?
* Are project team members accustomed to working collaboratively and being held accountable for project deliverables in addition to their primary job responsibilities?

Take these actions before you implement new technology:

|  |  |  |
| --- | --- | --- |
| Preparation | Assigned to | Completed date |
| Use the list of customer project roles above to identify the internal employees who can fulfill each role. Share responsibilities associated with the role with each prospective project team member to determine if they can be available to fulfill that role. |  |  |
| Compile a list of project team members with job titles and contact information. The Genesys team will provide you with the same. |  |  |
| Meet with team members prior to project kickoff to share goals for the project, the vision for how the project team will work together, how project activities and progress will be tracked internally, and standard communication channels. |  |  |
| Schedule regular internal project team meetings to track project progress, ensure team members are adequately supported, and identify/remove project roadblocks. |  |  |

# **Initiate**

The Genesys Professional Services team has scheduled the meeting to introduce project stakeholders. Take some time before this critical meeting to clarify what you purchased and the scope of the project.

Use these questions to guide your preparation:

1. What is the business case for the new solution and project? How will we measure our return on this investment?
2. Who is the project sponsor/business owner?
3. Who are the project stakeholders associated with each of the solutions we purchased?
4. Who is the core project team that will manage the project calendar and milestones, communicate progress, remove roadblocks, and manage the day-to-day requirements of new technology?

Take these actions to prepare for your project kickoff:

|  |  |  |
| --- | --- | --- |
| Preparation | Assigned to | Completed date |
| Review the Genesys licenses purchased, and the Professional Services Statement of Work (SOW).  Make a succinct list for your internal project team members that clearly states what you purchased, the functionality associated with each application, the scope of professional services, and any exclusions. |  |  |
| Keep a running list of questions and concerns about the contract, SOW, implementation, or anything else related to your new technology purchase or implementation. Keep track of who you share your questions with, response/resolution status, and outcome. This will help your Genesys project manager gather the answers to questions across our internal resources (sales, technical teams, development, professional services, support). |  |  |
| Schedule a product demonstration to cover the applications and functionality you purchased so project team members come to the table clear about what we be implemented. |  |  |
| Go through the Organizational Readiness guide, answer the questions, and begin to complete the action items in each section. Keep track of your progress using the “assigned to” and “completed date” columns. |  |  |

# **Kick-off**

The Project Kick-off is a key milestone in the project where we are creating a strong working relationship by introducing the teams, familiarizing everyone to the project methodology, and gathering and finalizing business and technical requirements. If time allows, it is a good idea to plan a virtual kick-off meeting as early in the project as possible to get the project moving forward. If on-site meetings are also planned, a more formal on-site kick-off meeting can also be held at that time.

Kick-off preparation starts with meetings between your team’s Project Manager and the Genesys Project Manager. It is likely that your project team has not been part of the entire sales process and they are new to the project. Therefore, they require a full briefing on the project’s goals and objectives, introduction to Genesys products involved and understanding of the high-level project time-line. The agenda will set a positive tone for the entire project by including many of the following points

|  |  |  |
| --- | --- | --- |
| Subject | Responsible | Notes |
| **Introduction of participants and project roles** | Project Managers from Genesys and Customer | Project Managers from Genesys and your company should provide documents with: project personnel, roles, titles and contact info |
| **Project Methodology Briefing** | Project Manager and Business Analyst from Genesys | Overview of Genesys deliverables specified in the project’s Scope of Work and how we will work together to achieve them. |
| **Project High Level Objectives** | Customer Project Sponsor/Executive | Your company’s project objectives and how they fit into the bigger company picture. This will set the tone for the entire project.  Start thinking also about how to measure the success of the project. |
| **Line of Business / Department Overviews and Objectives** | Line of Business Managers/Department Heads | More detailed overview of Line of Businesses and departments involved in the project. |
| **Weekly Project Reporting, Action Items and Timeline** | Genesys and customer PMs | Level set for weekly project management. |
| **Allow time for Q&A** | Your team with Genesys |  |

During kick-off be mindful that your business and technical teams may not have been fully briefed on the project so let them know that this kick-off is the beginning of a process designed to bring all parties up-to-speed and become ready to be fully engaged and participate in the process.

**Who to invite to the kick-off meeting:** Invite all key players from both the Business and Technical sides of the house who will be involved in the project. Let these people know that there will be follow-up activities planned that will help them get ready to more actively participate in the project after the kick-off.

Create momentum and get the team buy-in for the project. Set the tone and raise the engagement level. Deal with objections and get the team enthusiastic for the project.

# **On-site**

It is a good idea to plan many of these preparatory activities prior to the Genesys Professional Services team arriving on site:

|  |  |  |
| --- | --- | --- |
| Subject | Responsible | Notes |
| **Product Demos** | Genesys demo experts | These demos can be arranged by Genesys via virtual meetings and can help your project team get ready for the on-site activities. Often, the project team has not participated in product demos done in the sales process and want to know more about Genesys products. |
| **Offline Workshops** | Genesys and Line of Business / department leaders, Technical leaders | These are 1 to 2 hour workshops that can be run virtually and can be very helpful to allow the teams to begin discussing business and technical issues prior to Genesys arriving on-site. These “Offline Workshops” help make the on-site meetings more productive establishing more baseline information allowing the teams to get into greater detail quickly when they are face-to-face. |
| **Sharing of Information** | Technical and Business Leaders | Sharing documentation and information prior to the on-site meeting is extremely helpful and includes:  **Business:**   * Descriptions of business flows/processes relevant to the project * Customer service/experience objectives and metrics   **Technical:**   * Architectural, database and telephony diagrams * Contact strategies and flows * Key metrics |
| **Plan On-site Meetings** | Genesys Project Manager & Business Analysts. All company Project Managers. | Based on work accomplished such as Offline Workshops, plan the on-site detailed agenda noting:   1. what company personnel and skill sets should attend each session, 2. who will lead each session, and 3. the content expectation for each session.   Distribute drafts of the on-site agenda to make sure key players can attend during their scheduled times and deliver their required content. |
| **Arrange side-by-side observations** | Customer Project Managers | As time allows, arrange a time for Genesys personnel to observe agents in action who represent key processes and contact flows of the project. |
| **Build out the Project Plan and Timeline** | All Project Managers | Based on the key milestones, availability of resources and company objectives, the Genesys PM will build out the project plan in concert with your PMs and executives. |
| **Clear the admin work** | All Project Managers | Equip the project team with the right access to the systems and set-up a collaboration space |

# **Delivery**

# **Infrastructure**

The readiness for infrastructure starts with a review of most recent architecture diagram. Further down in the project, the Infrastructure design will touch also upon:

* Alarms and monitoring
* High availability
* Network environment
* Sizing and scalability
* User and roles

There will be time allocated in the project plan to go through all those elements but at this moment the few things to be highlighted are:

**For Premise deployments** where hardware is needed it is important to start the ordering process as soon as possible to avoid delays further down the track. If there are other partners that are managing your platform is best to get them involved early in the process so they can be prepared on their side.

The Genesys technical team will soon initiate the check on your existing environment to make sure is ready to accept the new solutions. A Pre-Installation Checklist will be sent to you to confirm information about:

* Hosts details
* Local administrator accounts set up on each of the servers
* Ability to remove firewalls, anti-virus, anti-malware programs during the install
* Ability to install different 3rd party software (ex. Java, .NET)
* Ability to temporarily host an apache or other web server
* Database details
* Network access
* Security certificates
* SMS gateway set-up
* Email exchange server set-up
* Others, depending on the solutions purchased

**For Cloud deployments**, the platform is in our responsibility, the list of items to be considered is highly reduced. We recommend to start thinking early in the process about:

* Security assessment
* Volumes for peak and standard
* Retention period

Genesys solutions are highly secure and we will provide any required documentation to prove compliance with customer internal standards.

The volumes and the retention period will help us build a robust solution, scalable and reliable.

# **Functional**

The Functional design is focused on the functionalities of the solution and you will be asked to provide several configuration elements that will be used to tailor the solution to your company needs. The configuration elements will include:

* Skills
* Agent groups
* Agents and supervisors information
* Reporting elements
* Call/IVR flows
* Not ready codes
* Disposition codes
* Case information
* Opening hours and special days
* Emergency handling
* Auto-attendant menus
* Queue music
* Priority tuning
* Distribution parameters
* Announcements
* Standard responses
* Others, depending on the solutions purchased

The Consultant will spend time with your team to understand how do you want to use the solution and will capture the need in the requirements document and the design of the new solution in the functional design document.

Be prepared for this phase by reviewing your current processes and capabilities and if applicable, sourcing any existing documentation on the current functionalities. Keep an open mind and take this as an opportunity to improve and change biased approaches. Genesys consultants will help with best practice recommendation and feasibility analysis.

# **Testing**

Testing is a very important step in the project lifecycle, this is where we validate that what we’ve done throughput the course of the project is not only working, but actually realizing the expected business value. We approach testing in 2 ways:

* Internal quality testing where we validate that the solution is working. This is entirely under Genesys responsibility and transparent to customers
* User Acceptance Testing where we check the functionalities against the business objectives. This is under customer responsibility but Genesys is providing support and guidance

The main purpose of UAT is to validate the solution against business requirements. This validation is carried out by end users who are familiar with the business requirements. Since user acceptance testing is the last step in the process before the application goes live in your production environment, this is the last chance for your team to verify that the Genesys solution is configured to meet your organization’s requirements. It also provides end users with a preview of the solution prior to go-live to help reduce or eliminate last-minute change requests as new business requirements are uncovered.

During the user testing phase of the project, your project manager is responsible for organizing internal employees to complete the UAT testing by following established guidelines with a standard set of use cases – and then documenting problems or bugs.

In preparation for the commencement of the User Acceptance Testing process, we recommend to:

* Prepare a clear **process and plan** for the testing round
* Prepare clear **instructions** for testers, including cases
* Make sure the testers have been provided **training** to the new solution
* Prepare **reporting** processes
* Develop a **communications** plan
* Develop clear **cases and test plans**
* Initiate the process for **test numbers** setup

Use these questions to guide your preparation:

* + - 1. Has our project team planned for and executed a testing plan for new technology? If yes, what are the lessons learned? If no, what do we need to know to be successful in our testing?
      2. Who will manage the UAT process internally and ensure all UAT obligations are met and the applications fully tested? How will progress be tracked and communicated?
      3. How will we train UAT testers to conduct testing of standard use cases and document all outcomes and anomalies?
      4. Do we have end users to create real-world functional scenarios that can be used for testing?
      5. Do we have real-world end users who can devote time to conducting realistic testing?

Take these actions to prepare for your project kickoff:

|  |  |  |
| --- | --- | --- |
| Preparation | Assigned to | Completed date |
| Document the use cases UAT testers will use to “test” the application. These will be the scenarios where your customers contact you and you contact your customers. |  |  |
| Identify your UAT team. Team members should be current end-users of the application(s) being replaced by the Genesys solution. |  |  |
| Develop and document the process for testing all use cases and capturing results to identify failure points, changes required, and validate that the process works as designed. |  |  |
| Create a testing timeline. This includes adequate time for testing as well as revisions and retesting. |  |  |

# **Go live and beyond**

# **Training, Training, Training**

For users to be successful and confident about new technology, they must receive adequate training and support. Training is one of the most critical success factors when new technology is deployed. It can have a significant impact on how employees use the new tools and whether they use them at all.

Genesys offers many levels of training. It’s important to choose the right level of training that matches your budget, resources, internal expertise, and culture.

The goal of training isn’t to teach users how to use the new technology features: It’s to teach them how to perform the required work processes using technology. This is an important distinction that will play a critical role in the transition of learning from the classroom to the job. A successful training is one in which the participants understand the context of new technology and how it will be incorporated into their jobs.

Training requirements will vary depending on the number and location of users, the solutions purchased from Genesys, the customization, and the training expectations and culture. For this reason, there isn’t a one-size fits all approach to training. During the sales process, ensure your team understands the training options available and plays an active role in working with the Genesys University team to plan and deliver training that meets your users’ needs.

Use these questions to guide your preparation:

1. What are our available training resources? Do we have a dedicated trainer who will take ownership of planning and delivering training? Will we borrow internal corporate training resources? Can we rely on internal staff to serve in training roles?
2. What’s our training culture? Are employees accustomed e-learning or hands-on classroom training? Are they comfortable learning on the job or do they expect to be fully proficient on all aspects of the application before they transition to using new tools?
3. Have we planned for ongoing training? After we go live on the new solutions, how will new employees be hired?
4. How will a new supervisor learn how to interpret real time views and run reports? How will a new quality team member learn how to search for and evaluate interactions using Interaction Genesys? How does a WFM analyst learn how to forecast/schedule with Genesys?
5. What will the new technology impact? How will it integrate with existing processes and workflows? (e.g. CTI that integrates with CRM system.)
6. How much of a shift is the new technology? How to best to approach that shift?

Take these actions before you implement new technology:

|  |  |  |
| --- | --- | --- |
| Preparation | Assigned to | Completed date |
| Start training discussions early. Update your training approach and plans as you learn more about the solutions and how employees will use them. Don’t have a dedicated trainer? We recommend you identify an internal resource (supervisor or manager) to track training requirements, manage resources (trainers, materials, system requirements, facilities), and communicate with internal employees about goals and objectives. |  |  |
| Create a matrix of what solutions and processes will require training, who needs to be trained, and when. Ideally, training should be conducted one week before employees will be expected to utilize their new skills and prior to UAT.  The New Technology Training Plan includes:   * Identify the solutions to be trained and the tasks associated with the solutions. * Identify who needs to be trained on which solutions/ tasks. * Identify the delivery method for each training application, side-by-side/small group, classroom training, e-learning, self-paced read manuals. * Identify the length of time required for each training event. * Identify total number of participants to be trained, and break down larger groups into multiple training events. * Identify lead time for training to complete required preparation, (train-the-trainer activities), develop learner materials, reserve classroom space and computers. * Identify training resources to develop and deliver each training event where required. Not every training event needs an internal training resource to support it. |  |  |
| Understand the scope of Genesys training modules purchased as part of your implementation contract. You can ask to review the training agendas and sample material sets anytime during the sales or implementation process to determine if they will adequately support your users’ training needs. |  |  |
| Anticipate barriers to your Training Plan and plan for contingencies with a Training Risk Plan. What if the go live date is delayed? Will that delay training? Do we risk bumping into other contact center events (busy periods, holidays, other training requirements)? What if the new platform isn’t available when training is scheduled to begin? |  |  |
| Debrief at the end of each module/day of training to determine what’s going well and incorporate user input into subsequent training events. |  |  |

# **Get through the adoption curve**

Successfully completing a project doesn't ensure that the organization will benefit from the project's outcome. The realisation of the business benefits is tightly connected with the optimal adoption and utilization of the technical solution.

Make sure you have a communication plan and employees understand the benefits of the change and are equipped to use the new solution. Reinforce the message regularly and get feedback on the adoption status. Make use of champions on the ground that will advocate the benefits of the new solution and will coach the other colleagues and support get through the learning curve faster.

During this sensible period, our Customer Care department will be there to support you. They will take over the solution from the Genesys Professional Services team and will be ready to answer any questions. Their pool of experts will be easily accessed via the online case system. A detailed introduction to the Customer Care support process will be provided closer to the milestone.

# **Measure success**

In order to measure success, a current performance baseline needs to be captured and in place before implementing a new solution. With this baseline, your team can revisit performance regularly and raise the bar to maximize benefits. Make sure you have clear definitions for KPIs used to measure the benefits and a way to compare like for like. Establish governance to review the data and take actions to maintain on track for success.