FRAMEWORK AGREEMENT

SCHEDULE 14

CALL-OFF FORM

CQC ICTC 23b

Lot 2 - CONTACT CENTRE SOFTWARE & WORKFORCE PLANNING SYSTEM

Care Quality Commission

and

Vodafone Limited

CALL-OFF FORM

CALL-OFF FORM TO ENTER INTO A CALL-OFF CONTRACT UNDER THE PSN SERVICES FRAMEWORK AGREEMENT reference RM1498 :

Dated[ ], Reference number CQC ICTC 023b

(1) **Care Quality Commission** whose principal place of business is at Citygate, Gallowgate, Newcastle Upon Tyne NE1 4PA (the **"Customer Authority"**); and

(2) **Vodafone Limited** Company Number: 01471587 whose registered address is at Vodafone HQ, The Connection, Newbury, Berkshire, RG14 2FN (the **"Contractor"**).

The Customer Authority re-opened competition under the Framework Agreement on 13 April 2015 and selected the Contractor to provide the Services on 25 June 2015

1 DEFINITIONS AND INTERPRETATION

1.1 Unless otherwise stated, defined terms used in this Call-Off Form have the meanings given in Schedule 1 (Definitions) of the Call-Off Terms incorporated through Paragraph 2.1 below.

1.2 The Initial Term shall be two years and the Commencement Date shall be **1 October 2015**. The Customer Authority shall have the option to extend the Initial Term by up to two (2) additional one (1) year periods by serving notice to the Contractor no less than three (3) months prior to the expiry of the Initial Term (or extension thereof).

1.3 The Framework Authority wishes to avoid the situation where through completion of this Call-Off Form by the Customer Authority and the Contractor, a Call-Off Contract creates a conflict with the Framework Agreement. Therefore, if there is a conflict between a Call-Off Contract and the Framework Agreement, the Framework Agreement shall prevail to the extent of such conflict and the Customer Authority and the Contractor shall comply with the instructions of the Framework Authority (acting reasonably and in consultation with the Customer Authority and the Contractor) on how such conflict shall be resolved.

2 TERMS OF CONTRACT

2.1 This Call-Off Form and its appendices, together with the Call-Off Terms (including the Schedules to the Call-Off Terms) shall constitute a Call-Off Contract.

2.2   The Call-Off Terms are enhanced by and subject to the contents of this Call-Off Form and any of its appendices.

2.3   The Services are to be provided for the benefit of:

2.3.1   the Customer Authority; and

2.3.2   the Indirect Customers set out in Appendix 1 to this Call-Off Form.

3   CALL-OFF COOPERATION AGREEMENT

3.1   In accordance with Clause 7.4.2.2 of the Framework Agreement, the Customer Authority does not require the Contractor to enter into a Call-Off Cooperation Agreement

4   CODE OF CONNECTION AND PSN COMPLIANCE CERTIFICATE (APPLICABLE TO ANY PSN SERVICES)

4.1   Not applicable as the Customer Authority does not require PSN Compliant Services.

5   GUARANTEE

5.1   In accordance with Clause 50 of the Call-Off Terms, the Customer Authority does not require the Contractor to enter into a Guarantee.

6.   GOVERNING LAW AND JURISDICTION

6.1   The Parties agree that this Call-Off Contract shall be governed by and construed in accordance with English law. Accordingly, where appropriate references in this Agreement to any laws shall be interpreted to mean the corresponding law (if any) in England and without prejudice to the Dispute Resolution Procedure each Party agrees to submit to the exclusive jurisdiction of the courts of England.

APPENDIX 1

INDIRECT CUSTOMERS

N/A

APPENDIX 2

INFORMATION REQUIRED FOR CALL-OFF TERMS

1   REPRESENTATIVES AND KEY PERSONNEL

1.1   For the purposes of Clause 20.1 of the Call-Off Terms, the Customer Authority Representative shall be:

Name	Responsibilities/Authorities
~~Vicky Waddie~~ ~~Senior Commercial~~ ~~Advisor~~	• As set out in Clauses 7.3 and 32.2.12 of the Call-Off Terms; • As set out in Schedules 2.1 (Service Levels, Related Remedies and Performance Monitoring), 2.2 (Security Requirements and Plan), 4.2 (Testing Procedures) and Schedule 6.5 (Business Continuity and Disaster Recovery Provisions) of the Call-Off Terms; • As set out in Schedule 6 (Standards) of the Framework Agreement; • [other]

1.2   For the purposes of Clause 20.1 of the Call-Off Terms, the Contractor Representative shall be: [Contractor to complete for Customer Authority approval]

Name	Responsibilities/Authorities	Key Role Minimum Period
~~[redacted]~~	• As set out in Schedule 2.1 (Service Levels, Related Remedies and	~~[redacted]~~

Name	Role	Responsibilities/Authorities	
Sector Neal Quinn – Client Manager David Porter – Unified Communications & Customer Interaction Business Development Manager		Performance Monitoring) of the Call-Off Terms; • [other]	

1.3 In accordance with Clause 26.5 of the Call-Off Terms, the Parties have agreed the appointment of the following Key Personnel:

Name	Role	Responsibilities/Authorities	Key Role Minimum Period
Collin Holt – Service Manager	Service Manager	• Level 1 escalation in relation to Disputes (see Schedule 6.3 (Dispute Resolution Procedure) of the Call-Off Terms) • [other]	

2 OTHER CUSTOMER AUTHORITY PERSONNEL

Name	Role	Responsibilities/Authorities
Lynne Pitchford	Head of Customer Support	• Level 1 escalation in relation to Disputes (see Schedule 6.3 (Dispute Resolution

	Services	Procedure) of the Call-Off Terms)
		• [other]
~~Customer PSN Services Manager~~		• In relation to Services procured under Lots 6 and 7 of the PSN Services OJEU only – Approval of changes to the Contractor's Call Off Service Catalogue in accordance with Clause 24.2 of the Call-Off Terms • [other]
~~Customer Authority's Change Manager~~		• Approval of Operational Changes and receipt of Change Communications in accordance with Schedule 6.2 (Change Control Procedure) • [other]

3   APPROVED SUB-CONTRACTORS

3.1   In accordance with Clause 22.2 of the Call-Off Terms, if the Customer Authority or the Contractor wish to remove any of the sub-contractors set out in Schedule 8 (Key Personnel and Approved Material Sub-contractors) of the Framework Agreement and/or add any more Material Sub-contractors in relation to this Call-Off Contract, they must obtain the prior written approval of the Framework Authority. In accordance with Clause 22.6 of the Call-Off Terms and subject to Clause 22.2 of the Call-Off Terms, the Contractor may sub-contract its obligations to the following Sub-contractors:

Sub-contractor Name, Address (including registered office) and Registered Number	Related Product/Service Description	Role in delivery of the Services

Content Guru Ltd, Eastern Road, Bracknell RG12 2UP	Storm Contact Centre	Cloud contact centre & workforce management solution provider

4 COMMERCIALLY SENSITIVE INFORMATION

4.1 Without prejudice to the Customer Authority's general obligation of confidentiality, the parties acknowledge that the Customer Authority may have to disclose Information in or relating to this Call-Off Contract following a Request for Information.

4.2 Without prejudice to the Customer Authority's obligation (unless it is a private authority) to disclose Information in accordance with FOIA, the Customer Authority will consider in good faith whether it is appropriate to apply the commercial interests exemption set out in s.43 of FOIA to the following Information:

Items	Duration of Confidentiality
Breakdown of pricing information to give input costs, capital and operating costs, overheads, revenue, margins and profits.	Term plus 6 years
How any payments due to the Contractor on the termination of the whole or any part of the Call-Off Contract have been or will be calculated but excluding the actual amounts of such payments.	Term plus 6 years
Any financial data relating to the Contractor's business as a whole including the financial standing of the Contractor provided in connection with this Call-Off Contract, including but not limited to any information relating to financial distress reporting.	Term plus 6 years
The cover and amounts of the Contractor's insurances.	Term plus 6 years
How any service credits are financially calculated under the Call-Off Contract, but excluding any details regarding the applicable service thresholds, or any performance related information or requirements, or	Term plus 6 years

Items	Duration of Confidentiality
information relating to the actual amounts of any service credits paid or credited to the Customer Authority.	
Technical details of the Contractor's network, (including topology, network diagrams, detailed network coverage, route maps, the Contractor's Points of Presence and/or street furniture/chambers etc.).	Term plus 6 years
Design documents relating to the Services and any notes or minutes of technical design meetings held in relation to the aforementioned but excluding any documents explicitly set out in the Call-Off Contract as being deliverables to the Customer Authority.	Term plus 6 years
The Contractor's own Business Continuity Plan, Business Incident Plans, and Disaster Recovery Manuals and Procedures, Security Plan and related Business Security Processes but excluding any Customer Authority-specific plans or procedures to be provided by the Contractor under the Call-Off Contract.	Term plus 6 years

5 LIMITATIONS ON LIABILITY

5.1 The amount referred to in Clause 42.2.2 of the Call-Off Terms for loss of or damage to the Customer Authority Premises, property or assets shall apply to this contract.

5.2 The percentage referred to in Clause 42.2.3 of the Call-Off Terms for loss, destruction, corruption, degradation, inaccuracy or damage to the Customer Authority Data or any copy of such Customer Authority Data shall apply to this contract.

5.3 In respect of Delay Payments and Service Credits the percentage shall be limited in each Contract Year to ten percent (10%) of the aggregate annual Charges payable to the Contractor under this Call-Off Contract.

5.4 The amount referred to in Clause 42.2.5 of the Call-Off Terms for all other claims, losses or damages shall apply to this contract.

5.5   The amount referred to in Clause 42.3.1 of the Call-Off Terms for all Defaults by the Customer Authority resulting in loss of or damage to the property or assets of the Contractor shall apply to this contract.

5.6   The percentage referred to in Clause 42.3.2 of the Call-Off Terms for compensation payments due in respect of Customer Authority Cause shall apply to this contract.

5.7   The percentage referred to in Clause 42.3.3 of the Call-Off Terms for the Termination Payment for the Services shall apply to this contract.

5.8   The percentage referred to in Clause 42.3.4 of the Call-Off Terms for all other Defaults (taken together) by the Customer Authority shall apply to this contract.

6   **STEP-IN**

N/A

7   **INDIRECT CUSTOMERS**

N/A

8   **CUSTOMER AUTHORITY AGENT(S)**

N/A

9   **NOTICES**

In accordance with Clause 59.4 of the Call-Off Terms, the following addresses and other details for service of notices shall apply:

Customer Authority: **Care Quality Commission**

Citygate

Gallowgate

Newcastle upon Tyne

NE1 4PA

Contractor:

Vodafone Limited

Vodafone House,

The Connection,

Newbury,

Berkshire

RG14 2FN

10 PROTECTION OF PERSONAL DATA

In accordance with Clause 32.2.14 of the Call-Off Terms, the Contractor will not Process Customer Authority Personal Data in the following territories:

N/A

APPENDIX 3

SERVICE REQUIREMENTS AND CONTRACTOR SERVICE DESCRIPTIONS

The Requirement

The CQC require a multichannel customer services solution with integrated front office and back office workforce optimisation for its National Customer Services Centre.

The solution needs to support flexible deployment of multi-skilled agents across front and back office areas, allowing 110 concurrent front office agents and back office agents scalable up to 300, totalling of 410.

The system will allow managers to access reports, dashboards and real-time data and allow a defined population of system administrator's access to conduct changes to both front and back office workflows or agent details.

110 agents to have multichannel access to support a current working profile of:

67 concurrent single channel agents (45 calls, 15 emails, 7 social media)

43 concurrent dual channel agents (40 call and email, 3 email and social media)

It will be necessary to add/subtract agent licences as per capacity demand on a monthly review basis.

Business Requirements

High level Business Requirements	
Description	
Requirement No.	
H01	The solution will provide a single user interface for agents to handle customer contacts via call, email and social media based on their skill, task prioritisation and queue volumes.
H02	The solution will provide searchable recording of calls handled by the contact centre.
H03	The solution will provision for contact centre monitoring, allowing for the understanding of productivity to support accurate resource forecasting in the front environment.

H04	The solution will have a provision for flexible demand forecasting over all front and back office operations, this will include modelling to understand the impact of potential change.
H05	The solution will enable CQC to offer self-service functionality for staff and will monitor adherence to all defined, agreed and approved plans.
H06	The solution will provide for the generation of detailed management information which can be used for performance management, workload monitoring, and future resource planning and financial evaluation of individual activity components, supportive of budget development.
H07	The solution will interface with other CQC systems, including SQL based information systems and databases, to support single data entry.
H08	Relevant training and project management support for implementation period will be provided for appropriate CQC staff.

Functional Business Requirements	
Customer Service	
Requirement no.	**Description**
CS01	**Call Distribution** – The system will have the ability to provide a multi-level editable IVR and queue management system, allowing skills based routing of inbound calls. Inbound number recognition is required to enable personalised routing of calls to specific agents / groups of agents. The system will allow agents to consult with internal / external colleagues during the call, transfer calls to numbers external to CQC, to groups of agents with differing skill sets and re-enter calls into IVR queues.
CS01	**Call back management** – The system will provide customers an option to request a call back should there be no agents available. The system will be able to detect the caller's number, if not withheld, plus allow customers to input an alternative number through the keypad. The system should allocate call back tasks to agents when available. Ability to select a preferred time frame for call back based on forecast, capture enquiry topic through option selection or voicemail, plus ability to extend call back functionality outside of normal opening hours is required.
CS03	**Call recording** – The system will record all inbound, outbound and transferred calls handled by agents. Recorded calls need to be held for a minimum of 6 months, downloadable in a variety of file formats and be searchable by time, date; phone number, agent name and CRM generated enquiry number where possible. Calls should be auto-deleted after retention period with exemptions defined by business rules (e.g. Calls transferred to Samaritans). The system will be able to archive call recordings to a secure location on CQC central drives. Access to call recordings must be variable dependent on role, allowing agents to access their own calls where appropriate

CS04	**Email distribution:** The system will be able to provide automated distribution of emails from more than one CQC mailbox. The system will apply phrase / keyword and attachment recognition to inbound emails to allow prioritisation, categorisation and routing based on editable CQC business rules. Recognition of customer email accounts and appropriate skills based routing should be possible. The system should also be able to provide customers with an automatic response containing the CRM generated enquiry number as a reference for the customer, both during and outside of working hours. The system will support the effective management of 'pending' emails within service levels, alerting agents and managers to messages sitting outside of service expectations.
CS05	**Social media:** The system will provide a work flow system for assigning incoming queries to agents or teams that keeps the integrity of threaded messages, prevents agent collision, supports public/private interactions and allows easy access to original post and share with others outside of the dashboard functionality. A prioritisation system for incoming messages (flag VIP messages), a tagging system and ability to mark sentiment is also required. The system will have an approval system that allows approval sampling and should access the Twitter firehose and Facebook equivalent/be an approved partner. It should also integrate with CRM.
CS06	**Web Chat:** The system should have the capacity for CQC to introduce web chat functionality in future to allow for customer services expansion and improvement. Any web chat functions should mirror others within the system with regards to allocation of tasks and provision of management information.
CS07	**Information provision to Agents** The system shall allow editable messaging though the agent desktop, to inform of scheduled and live activity, service levels, own performance and urgent operational messages. Display of operational messages on front office wall boards. The system should have capacity to support consistent customer responses, including templates / scripting for calls and emails and ability to add links to key policy documents. Provision of a quick dial list for agents, which can be centrally managed by systems administrators.
CS08	**Navigation and Basic Views for End users** - The system shall be user friendly and have a high standard of usability e.g. offers access related to roles, variable screen and function tailored to role/tasks, simple help options, minimum clicks to get to key in information. The system should support flexible agent utilisation across multiple customer service channels within the same user interface / desktop.
CS09	**Systems Integration:** System must be able to connect to CQC's Oracle Siebel CRM system (either via a dedicated connector or through Siebel's Out of the Box CTI connectors). It should also be future proof by integrating any other platform via native connection and/or our ESB solution (Mulesoft). The solution is also required to be compatible with the Siebel Open UI framework (IP2013 and IP2014). The integration with CRM should include all the required data for provision of customer recognition, display of past and pending customer interactions, and auto population of CRM enquiries (Service Requests) with relevant contact information and auditable records of actions taken by agents. The solution will also be required to integrate with CQC's Data warehouse (OBIEE 11g) via ETL (currently nightly) for reporting

	purposes, Examples of the data currently used include: IVR option selected, caller wait time, caller talk time this is not an exhaustive list
CS10	**Quality & Satisfaction monitoring:** The system will allow for varied customer feedback capture across all contact methods with associated reporting capacity by individual / team, query type and contact method. The system should alert managers to customer requests for call back / additional contact, allowing for complaint resolution. The system must allow remote monitoring of live calls from any location, in addition to the evaluation of call recordings against quality criteria. Individual results should be accessible to agents and reporting available for managers by individual, team, query type and contact method to allow for internal development and improvement of customer experience.

Functional Business Requirements	
Workforce Optimisation	
Requirement no.	**Description**
WF01	**Resource Planning** - The system suggests the 'best fit' for resource planning based on using a variety of CQC criteria e.g. availability, demand activity profiles, key skills and CQC business rules and other related HR data. This will need to be able to consider inputs for all front and back office staff resources.
WF02	**Desktop Process Monitoring/process analytics** – functionality should be available to support future development of back office resource planning against delivery expectations, considerate of actual productivity achievements to aid accurate forecasting model production. This should include repeated intervention flagging to help drive continuous improvement focus.
WF03	**Scheduling Management** - The system will be capable of creating, amending, planning, modelling and optimising 'real time' or short term scheduling activities, work load forecasting to identify resource shortfalls, optimise scheduling activities and manage live schedule adherence. Resultant individual schedules should be displayed within agent desktop and provide activity reminders or alerts for agents. An equivalent back office desktop must be available for those staff not linked directly to front line services.
WF04	**Demand Profile and Forecasting-** The system will have the capability to model or forecast and optimise scenarios over the short and long term (based on current workforce, what if or predicted workforce) scenarios to identify real or potential resource shortfalls. Providing CQC with the functionality to create optimal baseline workforce teams by staff type, skill mix, availability, staffing levels and working patterns to understand and assess resource or staff demand; to support optimal scheduling activities, planning and recruitment strategies.
WF05	**Configuration Business Rules** - The system will support the creation, reconfiguration by CQC staff and the application of business rules (based on CQC central policies and local practice). It shall be flexible to allow the structured updating of activity coding, business rules and policies with a facility to allow a control manual override, where appropriate.

WF06	**Self Service** - The system will support multiple access routes via CQC systems, internet, intranet, personal and mobile devices to designated system resources to provide two way flows of information enabling interaction and communications for NCSC staffing to support planning and scheduling. The system will allow for automated annual leave requests, flexible working requests, shift swap and manual adjustments based on business rules across front and back office teams.
WF07	**Management Information, Dashboard and Reporting** - The system will have a wide range of standard reports and dashboards, that can be tailored and re-configured easily to fit CQC requirements for previous, current and modelled activities. This must include; individual and team performance data for front and back office; schedule adherence; attendance data; customer experience metrics such as response times, transfer volumes and first point resolution rates. Access to data should be restricted by role and the system capable of auto delivery of configurable role-based performance scorecards. Real time views of activity across all front office work streams are required to allow intraday management of performance and service levels. Editable data sets to be displayed on wall boards and screens. The system must be able to receive, analyse and integrate with data sets produced by existing CQC reporting repositories (ie OBIEE data warehouse) to allow for any comparative analysis requirements.
WF08	**Commercial Information** - The system will be capable of producing cost per transaction detail at functions, department and interaction levels. Outputs will be supportive of budget development and commercial forecast monitoring.

Non Functional Requirements
Availability requirements & support
System Access – System will be able to be accessed from multiple locations to support business continuity and developing initiatives such as home-working, expanding business delivery.
System availability – Any system is required to meet service availability levels of 99%, Monday to Friday 5 days a week with the exception of bank holidays (to support current working hours of 8.30 until 5.30), with CQC/supplier system maintenance or capacity to expand outside these working hours on demand.
Required server environments – The following server environments are required Live, Test, Forecasting and Training.
Integration with current and future CQC operating systems - standard browsers and mobile technologies, Microsoft GUI standards must be applied. CQC standard build has available - IE 10, Firefox and Google Chrome, Office 2010, Java V1.6.0_22, Active X V7/8/10 and 11.

Technical Support – To include technical design documents for each component of service. Access to technical support services to be available 5 days a week, with capacity to expand outside these working days on demand.
Service levels to meet the below requirements as closely as possible:
Level 1 incidents (full system outage): Respond and fix within 4 hours
Level 2 incidents (partial system outage) Respond and fix within 8 hours
Level 3 requests (changes, addition/deletion requests) actioned within 72 operational service hours

Training Support – Will underpin the solution delivered to CQC and be tailored for all levels of interaction and roles

Disaster recovery – System will be supported in the event of a disaster and any recovery plans will be tailored to CQC needs and be compliant with business continuity standards.

Recovery time & point objective – Minimal recovery time with optimal recovery points.

Backup schedules - Back-ups are to be carried out completely according to the documented data back-up requirements. Appropriate personnel are to verify the usability of backed-up data and retain verification evidence.

Storage - System will handle increase in call recording, database and report server storages without major system changes or data migration activities. Audit trail functionality should be in-built.

System scalability - System shall be scalable both in terms of users and storage, with easy to change both in terms of cost and minimal disruption.

Capacity – the call distribution system must be able to provide for a minimum of 200 concurrent calls (with agents and in queues) with no service disruption
The email routing system must have capacity to receive and distribute a minimum of 950MB daily inbound email traffic per mailbox.

Security - All circuits carry information evaluated as OFFICIAL

Assistive Technology - Solution must be accessible via existing assistive technology solutions'

The successful supplier must have a:-

- Demonstrable experience of creating a multichannel contact centre and workforce optimisation systems and associated end to end processes that have underpinned the deployment of these. Please provide details of previous contact centre and scheduling system & workforce planning/optimisation services work you have being involved with.

- Demonstrable experience of project management and implementing a system and service commensurate with CQC requirements (this must include a description of how you will project manage the delivery of the system & service together with the resources that will be deployed).

- Description of proposed methodology for skills and knowledge transfer.

PART B: CONTRACTOR SERVICE DESCRIPTIONS

The proposal set out below is subject to change and all changes will be carried out in accordance with Schedule 6.2 (Change Control Procedure).

The Parties shall work together to agree a high-level design and project plan within 30 Working Days from the Effective Date.

Leadership

Provide details of the qualifications and experience of the individual whose responsibility will be to ensure that the requirement is delivered.

Response:

With over 100,000 contact centre cloud users and 15% market share in the UK Vodafone contact centres handle over a 1 billion calls per annum. We are very proud of our customer feedback and are happy to set up a meeting with any of our customers. We have provided contact centre services to the Public Sector and NHS organisations such as NHSBT, South Central Ambulance (SCAS) and NS & I for many years. Please see Appendix B – Case Studies for more information.

Key to the success of the CQC's solution delivery and the outcomes expected will be effective contract management, programme management, service management and governance.

For the purpose of Clause 20.1 of the PSN Framework Schedule 14 Call Off Terms – Appendix 2 Representatives and Key Personnel as set out in schedule 2.1 service levels, related remedies and performance monitoring of the Call Off Terms Vodafone nominated Contractor Representatives are:

- Helen Freestone – Head of Regional Sales Public Sector
- Neal Quinn – Client Manager
- David Porter – Unified Communications & Customer Interaction Business Development Manager

In accordance with clause 26.5 of the PSN Framework Schedule 14 Call Off Terms – Appendix 2 Representatives and Key Personnel level 1 escalation in relation to dispute Vodafone nominated Contractor Representatives are:

- Colin Holt – Service Manager

The Vodafone implementation team will be led by a Programme Manager who will work with the CQC Project Board to provide:

- Continuous alignment of the project with strategic business and organizational objectives.
- Ensure that each project work stream is delivered on time, within budget, to the appropriate quality and agreed standards to ensure that CQC realise its projected business outcomes.
- Proactive engagement and strong focus on CQC stakeholders in regard to the

project's progress.

The Vodafone Programme Manager will be the single point of contact and take ownership for the delivery of the proposed solution. The Programme Manager will report into the Project Board which would be made up of sponsors from Vodafone and CQC.

In accordance with Paragraph 3.1 of Schedule 6.1 Governance of the Call-Off Terms Vodafone would propose the following board structures and representations:

Figure 1: Your Account Management team will cover you from every aspect

Below are some example CVs of Vodafone programme and project managers:

Programme Manager CV

Profile

APMP and PRINCE 2 qualified with 10 years' experience across blue chip organisations with a successful track record of delivering IT infrastructure and business change projects and programmes to defined time, cost and quality criteria. Experienced in managing complex customer / supplier relationships, with excellent leadership and organisational skills supported by strong stakeholder management / team building aptitudes.

Strengths include planning, prioritising and decision making supported by a pragmatic approach and first class communication skills. Adept at engaging all levels of seniority with a strong understanding of project and programme governance, quality control and change management disciplines.

Qualifications

- APMP

- Prince 2

- Siemens certified project manager

- Familiar with different methodologies eg: Agile

Career history

Xxxx ltd

Programme manager for Network Optimisation Programme

Programme Manager

- Transform the DISC network and telephony estate and deliver cost savings - including WAN upgrade; LAN refresh; Deployment of IPT services across the transformed network; PSN compliance and security accreditation to restricted IL3; transform video end points in scope

- Regular attendance at the programme board

- Managing a team of 2 senior Project Managers and 11 project managers across the supply chain

- Overseeing delivery of all activities across the programme

- Responsible for Senior stakeholder management

- Defining and delivering programme closedown activities to a successful outcome

- Responsible for a combined budget of 11M with responsibility of P&L management including incremental programme opportunities

Senior Project Manager

IP Telephony solution across the Ministry Of Justice (MoJ) estate

- Transform the MoJ HMCTS legacy telephony service to an Internet Protocol Telephony (IPT), Pan Government Accredited (PGA), Public Services Network (PSN) hosted solution across ~36000 users and ~460 sites

- Responsible for a budget of 4M with responsibility of P&L management including incremental project opportunity

- Leading a team of 9 PM's and with a wider team of ~ 110 SME's made up from resources across 4 organisations (Atos, BT, Siemens and the MoJ)

- Development and implementation of communications and stakeholder management strategy including government departments and the Judiciary

- Multiple supplier management ensuring delivery to contracted quality and time criteria

- Delivery of Service Management (ITIL) processes ensuring successful operational acceptance

Line management of 1 senior project manager and 2 project managers

- Responsible for appraisals, objective setting, personal issues, development plans,

absence management

Programme Lead delivering North West Europe (NWE) cluster element of Siemens Glob services transformation

- Delivery of End User Computing transformation (CQC, Active Directory, Email, Account Group and Share Management) to all Siemens users across Sweden, Denmark and Finland

- Leadership of in-country / remote project teams (3 lead PMs, 4 workstream PMs and up to 14 SMEs)

- Service Desk and Operational Framework transformations across the three countries.

- Stakeholder management through timely and targeted communication, meetings, workshops and presentations to a broad range of stakeholders, including CQC, NWE Operations Management, local operations management, Account Management and Project Board up to Executive Management Team

- Responsible for a transformation budget of 3.4M Euros across all countries in Scope

- Proactively managed risk through regular workshops and reviews both internally and jointly with the CQC

Project Manager CV

Profile

An experienced projects & programmes professional with proven Telecom & IT Programme/Project Management skills developed over the past 25 years .Worked in both the Public and Private sector as both a customer and a supplier

Qualifications

- Prince 2

- Familiar with different methodologies eg: Agile

- Security Status SC cleared

Skills

Proven Telecom & IT Programme/Project Management skills developed over the past 25 years in the Telecom/IT industries.

Proven Customer Service Management skills gained in an outsourced contract environment including TUPE transfer.

Detailed knowledge of process and procedure development within "service provider" organisations

Proven bid management / tender response experience both in the Public and Private Sector.

A broad technical knowledge and understanding of the following technologies IP, VOIP, Wireless (Point to Point & Point to Multi Point), LAN & WAN technologies / architectures,

VPN's, voice networking, Broadband solutions, Contact / Call Centres, PC's, Wintel Servers and storage area networks

Recent projects

Jan 14 – Today - GCF to PSN Transition

Leading the Vodafone Transition team migrating the existing ▉▉▉▉▉▉ to PSN at IL2, IL3 and IL4. (588 Public Sector Customers).

Nov 12 – Dec 13 – Public Sector Pre Sales

Supporting the Public Sector Account teams by providing advice on Transition methodology and Project Management approach for large programmes. Manage a team of Pre-Sales Project Management consultants.

2011 – 2012 – Various public Sector Programmes

▉▉▉▉▉– Replacement of the Call Centre infrastructure and migration of their truncated 0845 46 47 from BT to Cable & Wireless

▉▉▉▉ – Back Office expansion – consisting of the upgrade of network capacity into all of ▉▉▉▉ Call Centre sites without interruption to existing services.

2007 – 2011 – Network Transformation Programme Lead

Working for ▉▉▉▉▉▉ Project team including 3 Project Managers, Solution designer and Administrators replacing the WAN (EFM & BGADSL), LAN, WLAN & Voice infrastructure in 2500+ stores throughout the UK & Republic of Ireland.

2003 – 2007 – Programme Director – Lincolnshire County Council

Managed a £15m Broadband & ICT Support Project incorporating the deployment of a county wide, 38 site, wireless network and support to over 1000 Private sector companies in Lincolnshire

Project Management Overview

Vodafone Programme & Project Management Framework known as One Way of Delivery (OWOD) has been developed from MSP & PRINCE2 with positive feedback from our CQCs. It provides an outline approach, tailored by the Programme or Project Manager to meet the needs of CQC and the objectives of every programme or project. We only use the process and tools which are directly applicable and required for the requirement at hand, saving time and ensuring we are on target with your objectives.

It is framework which:

- Allows all sizes and types of Programmes and Projects to be delivered using a consistent set of processes and templates.
- Provides Governance appropriate to the size and complexity of the Programme / Project.
- Allows local variations to operate by the use of overlays relevant to the Business Unit or Delivery Unit.

The framework will provide improvements in simplicity, clarity, consistency and coherence by:

- Using a single approach for all types of Programmes and Projects.
- Providing a clear differentiation between Programmes and Projects.
- Providing clear guidance on the definition of delivery type and associated Governance.
- Using a common language (based on the OGC suite – Managing Successful Programmes - MSP, PRINCE2 and P30.)
- Removal of multiple methods and frameworks.
- Having the ability to produce far more meaningful Management Information and trend analyses to support decision making in delivery.

Above all, this will help us achieve more successful and controlled delivery to CQC.

The key elements of our Project Management Framework include:

- **Risk Assessment** - Identifying the key benefits of the project to CQC; assessing the level of risk and developing risk mitigation strategies.

- **Right Resources** - Creating a project-specific organisation, showing the structure of the project; the people involved; their role in the project team; what they will be doing; and most importantly, their outcomes which they will achieve.

- **Detailed Planning** - We will have a joint Project Definition Workshop (PDW) to define / review and agree on the project approach and scope with your team.

- **Management Overview** - Including management and team reviews, reports on project status and progress, documentation of project initiation and closure - tracking, monitoring and ensuring everything is done properly.

- **Quality Assurance** - Making sure we deliver our promises made to you and your business requirements.

- **Communication** - Keeping you informed, making sure we keep all key stakeholders informed, from both organisations, with the information they need about the project, when they need it.
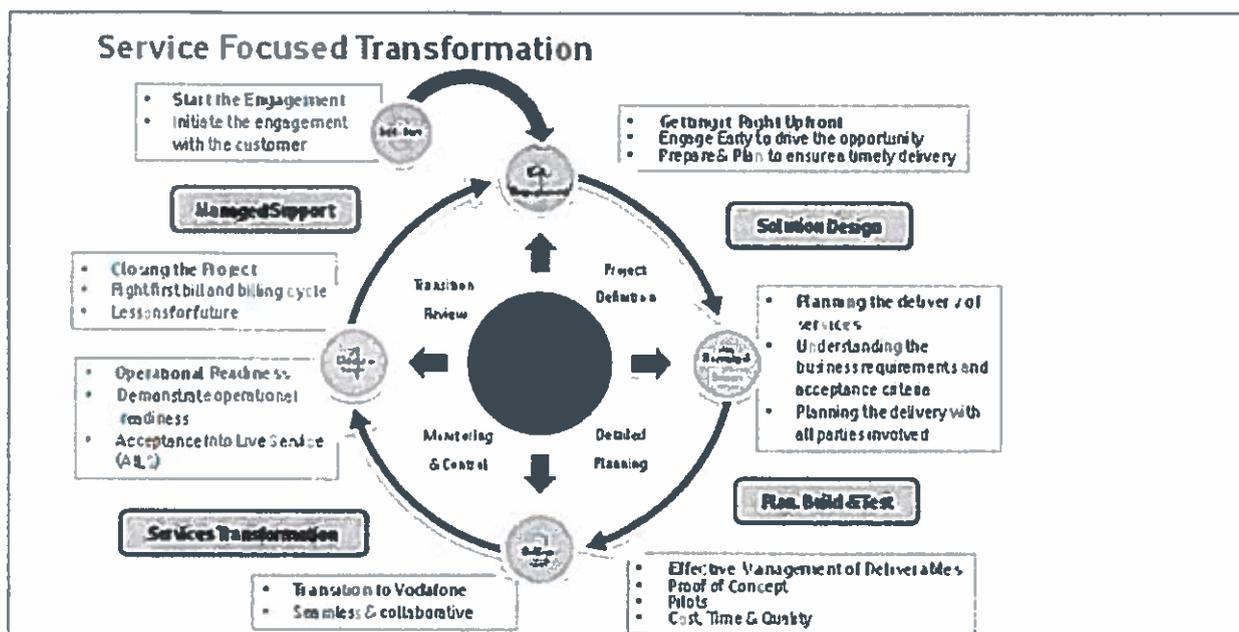
Service Focused Transformation

- Start the Engagement
- Initiate the engagement with the customer

- Get bought Right Up front
- Engage Early to drive the opportunity
- Prepare & Plan to ensure a timely delivery

Managed Support

- Closing the Project
- Right first bill and billing cycle
- Lessons for future

Solution Design

- Planning the delivery of services
- Understanding the business requirements and acceptance criteria
- Planning the delivery with all parties involved

- Operational Readiness
- Demonstrate operational readiness
- Acceptance into Live Service (ALS)

Services Transformation

- Transition to Vodafone
- Seamless & collaborative

Run, Build & Test

- Effective Management of Deliverables
- Proof of Concept
- Pilots
- Cost, Time & Quality

Figure 2: Easy, understandable and fully controlled lifecycle

The Vodafone Project Life Cycle described in the diagram above and in the following paragraphs provides a general overall summary of the key components of the project approach with their corresponding standard documentation set.

Vodafone Project Managers are required to work together with CQCs to customise and agree the documentation that fits the CQC's company policy and business requirement while maintaining our professional project management methodology.

Vodafone project life cycle - project initiation

The first key step in the initiation phase of the Project is to define and agree the project scope with CQC. The project scope defines the limits of the project - what the project includes, as well as what is specifically excluded from the project.

On approval and sign-off of the Scope, as part of the Project Initiation Document (PID), the Project Manager assumes responsibility for developing the detailed project plan and for executing the project in accordance with the PID.

The Project Definition Workshop is chaired by a Vodafone Project Manager with CQC's help to ensure that the project is comprehensively scoped and planned with the right stakeholder(s) identified.

Vodafone project life cycle - execution

With the sign-off of the Project Initiation Document, the Project Manager is able to work according to a baseline and execute individual planned activities in full swing with their downstream suppliers, vendors and internal provisioning functions.

Regular meetings are conducted with CQC, stakeholders and project board/sponsor to report the Project status together with the actions, changes, issues, risks, assumptions and dependencies.

The agreed Project Change Management Process will allow the Project Manager to centrally qualify and keep track of all project change requests.

For each successful CQC site migration, our Project Manager will consolidate the service inventory and reference number and handover to CQC for acceptance.

Vodafone project life cycle - transition and closure

The Project Manager is responsible for the network build, commissioning and customer migration according to the agreed migration approach and acceptance criteria developed with CQC during project initiation.

The service inventory are handed-over to CQC and the 24x7 Operations Support function with the objective to be able to identify the individual components that make up the services and transition from project to operations support stage.

The Project Manager will work in parallel with Operations Support function for an agreed "service acceptance period" to ensure seamless transition and this process will be documented using an Acceptance Into Live Service document (AILS).

Upon the last deliverable of the project, the Project Manager will chair the Project Closure Meeting with CQC and Operations Support function to identify, follow up any outstanding actions with clear owners and timeline to complete. Lessons learnt are also shared throughout the duration and at the end of Project.

Project Deliverables

As with any project methodology, the Framework is completely flexible and can be adapted to meet any specific requirements of the Customer. The following is a list of the key deliverables that comprise the project management elements as opposed to the solution. Standards for these are included with the Framework but each can be amended to suit the requirements of the project. Depending on the size, complexity and risk of the project some of the deliverables may be combined or omitted.

- Standard Management Deliverable Descriptions:
- Project Mandate
- Project Brief
- Project Initiation Document
- Project File
- Project Stage Plan
- Project Implementation Plan
- Financial Approach
- Benefits Approach
- Health, Safety and Environmental Approach
- Security Approach
- Project Authority Records
- Handover Certificate
- Work Package

- Standard Communication & Reporting Deliverable Descriptions:
- Communication and Reporting Approach
- Project Meetings
- Checkpoint Report
- Highlight Report
- Exception Report
- End Stage Report
- Lessons Learned Report
- End Project Report
- Standard Quality Deliverable Descriptions:
- Deliverable Quality Review
- Quality Approach
- Risk / Issue / Change Control

Method Statement

Describe (with specific reference to the elements of the requirements and the outcomes expected) how it is intended to deliver the requirements of the specification.

Method Response:

Having provided communication services to the Care Quality Commission for over 7 years, Vodafone understands the absolutely critical role that Contact Centre plays in the Care Quality Commissions ability to deliver its health and social care regulatory responsibilities and to improve the quality of care provided to the public whether by the NHS, local authorities, private companies or voluntary organisations across England.

Vodafone understands that much of CQC's regulatory activity falls within the scope of registration. To do this effectively CQC is undergoing major transformation across its people, property and processes to support its new strategic priorities:

- Ensuring care is centred on people's needs
- Championing joined-up care
- Acting swiftly to help eliminate poor quality care
- Ensuring and promoting high quality care
- Regulating effectively in partnership

Vodafone understands that The Care Quality Commission's National customer services centre (NCSC) located in Newcastle upon Tyne encompasses both front office customer services functions (contact teams for general and high risk inbound traffic via telephone / email) and back office teams who handle inbound and outbound post, process applications and regulatory information, in addition to conducting many other data input and support functions for the organisation.

The contact centre workforce of 444 people dealt with over a million transactions in 2013/14.

The centre's primary aim is the positive experience of our customers and it is therefore

imperative that every interaction is connected.

We also understand your Commercial Strategy and the priority to save 30% from operational budgets through such initiatives as rationalising the accommodation estate and using fully flexible office space. This initiative requires a contact centre and workforce planning service that provides flexibility and simplicity to enable new organisational structures in the future.

Many organisations face the same challenges as CQC do today:

- Ageing complex and increasingly expensive Telecommunications and Contact Centre Systems
- Delivery of an effective Business Continuity and Disaster Recovery solution
- Lack of flexibility to support a changing organisation
- Capability to support an increasingly mobile workforce
- Inability to support multi-channel interactions
- Inability to provide additional contact centre system capacity on demand
- Lack of Integration between front and back office systems
- Ineffective Workforce Planning
- Limited Business Analytics capability to support service review and improvements.

Following our visit to your Newcastle Office, Vodafone understands the importance to you of ensuring that CQC are served by a more modern, integrated Contact Centre Software and Workforce Planning system. This system must interact simply with your Fixed and Mobile Telephony and Video systems driving efficiency and providing the foundation that provides your business with the flexibility and confidence to enable your users to work from any location using any device and remain contactable.

CQC's vision for it's Contact Centre is:

- To deliver a fully integrated telephony, contact centre and workforce optimisation solution.
- To provide skills based call and social network routing capabilities to the contact centre.
- To Integrate the Contact Centre with CQC systems including:
    o CRM
    o OBIEE
- To provide enhanced workforce planning and attendance management facilities.

To support this vision Vodafone is offering CQC a contact centre software and workforce planning system based upon our storm contact centre service. The services are compliant with CQC's contact centre and workforce planning functional and non-functional requirements.

Expected Outcomes, Better Ways of Working and Benefits Realisation

By tendering for a new Fixed and Mobile Telephony and Video Service CQC seek to deliver a fully integrated telephony, contact centre and workforce optimisation solution capable of providing:

- Inbound customer contact
    o Automated call distribution to include IVR, queue management and call-back options

- o Skills based routing for calls and emails
- o Customer recognition and personalised routing
- o Text analytics to support email triage
- o Multi-channel agent desktop – integrating social media tasks, emails and calls
- o CRM and systems integration
- Management information
  - o A reporting suite to allow historic and live data reporting across all channels
  - o Provide automated and editable scorecards for agents and managers
  - o Support live visibility of shift adherence
  - o Provide forecasting for all channels
- Customer Service measurement
  - o Provide customer feedback surveys
  - o Provide quality monitoring
  - o Provide Call recording
- Future proofing the Service
  - o Be accessible from any CQC office workstation
  - o Provide Web chat options
  - o Provide Speech analytics options
  - o Capable of expansion across back office tasks
- Workforce Planning and Optimisation. Following the various discussions we had during our tour of your contact centre, some of the key challenges your user groups had were specifically around the complex and time consuming nature in developing reports and planning future campaigns. Our proposed solution will meet those challenges by delivering;
  - o Supported, scalable and reportable workforce optimisation toolset
  - o To implement flexible forecasting
  - o To implement workforce modelling to understand the impact of change
  - o To implement self-service portal for staff
  - o To manage staff availability and attendance to system generated work schedules based on self-service input, forecasts and skillsets
  - o To support annual budget development
  - o To measure productivity - Task delivery time -> Data input capture (real-time input recording)
  - o Full MI suite to support all system interventions, hierarchal access levels
  - o Cost per transaction functionality – delivering VFM
  - o To mitigate risk of heavy reliance on Excel spreadsheets and specialist technical skills to maintain current processes.

The storm contact services proposed for CQC are underpinned by Better Ways of Working (BWOW) consulting services and our own contact centre experiences. An important part of Vodafone's contact centre positioning is that we practise what we preach. We have

considerable expertise in our own contact centres, and the lessons we learn there are used to colour the advice we give through our BWOW and consultancy activities. We are happy to arrange a visit to our contact centres for CQC to see how a multi-media contact centre works in practise.

Our own contact centre and customer services organisations were facing numerous challenges:

- Missed NPS targets, Missed Opex target
  - Technology Issues
  - Fractured estate
- Limited call routing capability
- Limited self-serve capability
- Management Issues
- No end to end view of customer journeys
- Business Plan based on beliefs – not good MI from the systems
- No self-improvement loop

How did we fix it?

- Through Better Ways of Working – analyse how we work with callers
- Introduction of IVR Self Service
  - Registration-less tops ups, Billing & Balance information, 3x3 principle
- Use of eCare
  - Email, Web chat, eForums, Social Media, YouTube
- Identify bad callers: 1.5% of base make 20% calls (one caller made 2874 calls to CC, cost us £6,400!)
  - Route them to a specialist team

We achieved:

- 31% Reduction in opex over three years
- Consumer Touchpoint NPS went from 7.0 to 19.8

WE PRACTICE WHAT WE PREACH!

- 2.6 million phone calls per month
- 3000 concurrent FTE
- 4500 concurrent calls
- 6000 FTE

Better Ways of Working Summary

Traditionally the workplace is built around the way people are managed rather than the way people work. Business is becoming much more complex, hierarchies are giving way to human networks to solve difficult problems. In addition, space is becoming expensive, many workers jobs are becoming "un-tethered" from the office and technology is enabling the "mobilisation" of social networks, for example we can work at home, share or hot desk or be fully mobile.

The change from traditional office-based working to Better Ways of Working (BWoW) necessitates a change in behaviour in workers and the way in which they work, this change is the key to performance gains; a workplace which supports this behavioural change in terms of Space, Technology, People and Processes will be more efficient, successful and

profitable than one which does not.

Vodafone's BWoW methodology is a unique programme of workplace transformation delivered through an integrated solution across People, Space, Process and Technology. It is based upon helping CQCs transform the way that they work using Vodafone's own transformation program and dedicated team of experts.

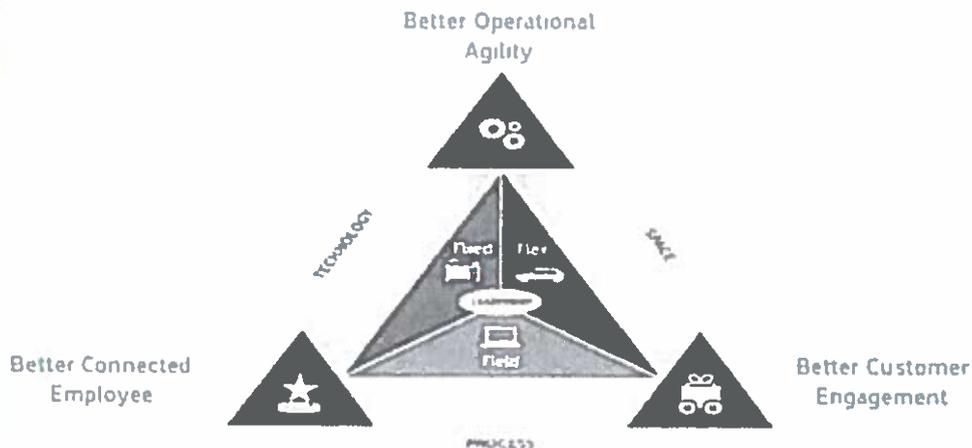Figure 1 below shows how all aspects of Better Ways of Working act together to provide total workforce and workplace transformation.

Figure 3: the triangle of success behind the Better Ways of Working

People - Through the user profiling of people we can see not only what technology tools they need to be successful and productive but also possible barriers to success and how they can be overcome

Space - By understanding the workplace we can advise on the right physical office layout is required to augment the environment and support any required behavioural changes

Process - Concentrating on the policies, processes and tacit behaviours within the work place that enable and/or inhibit a different way of working, we can advise on what has to change in order to ensure that both staff and the company are getting the best out of the changes across the other dimensions

Technology - Buildings and people form the fabric of any organisation and are the most expensive assets. Connectivity is the technology that binds them together so Vodafone have a range of solutions to enable organisations to stay connected whether it is fixed solutions such as SIP Trunks or Wide Area Networks or Mobility through Wi-Fi and 4G. Once we have profiled the workforce, users usually fall into three categories: Fixed, Flex and Field. These profiles determine the required technology to enable them to perform their job function most effectively

BWoW – Advisory Professional Services

Vodafone have built a Workplace Transformation practice to help our CQCs achieve benefits aligned with their business priorities. Vodafone's Professional Services methodology for Better ways of Working is comprised of various engagement studies, shown in Figure 2 below.
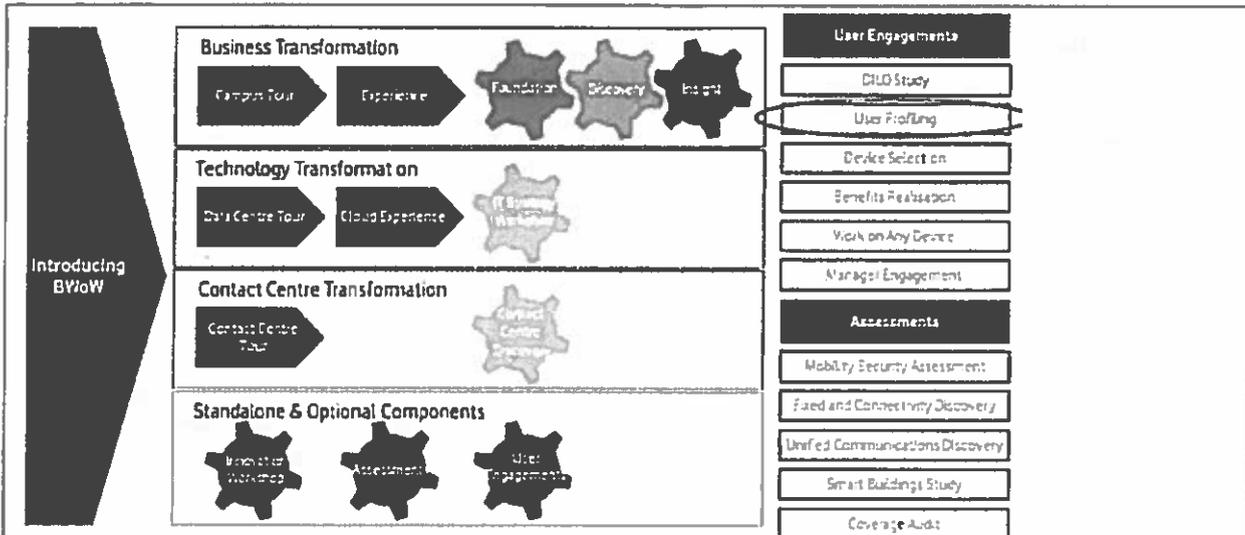
Figure 4: With the better ways of working you will get a professional service throughout your whole experience

BWoW – Contact Centre Advisory Services

The Contact Centre study has been designed to explore the nature of a customer's contact activities together with the needs of the organisation that exists to service them and recommend improvements to their way of working. This service can be provided to CQC at an optional cost.

Purpose

The module focuses on current activities and practices, their alignment with the customer's contact priorities and objectives and assesses how the current environment and capabilities relate to model industry practices.

Study Structure

Executive Interviews (45-60 minutes)

Face to face or telephone interviews with the senior leader responsible for the contact centre to build an understanding of existing practices, change programmes and challenges.

Contact Centre functional heads Interviews (30-45 minutes)

Interview max 4 functional heads at the contact centre to build a more granular understanding of existing arrangements.

Interviews with key staff concerned with MI reporting, Data & IT, Finance (30-45 minutes)

Interviews with max 3 key staff.

Contact Centre Team Level Activities (max 6 teams)

Interview Team Leaders and interviews/service observations of agents.

Mystery Shopping (by agreement)

Contact Centre Output

Executive Summary

High level predicted benefits, purpose of the study and headline summary of findings.

Scope and Approach Taken

Area of the business in scope, No. of people who have been interviewed and/or shadowed.

Key Findings

What works, what doesn't work, what can be improved.

Better service roadmap incorporating high level technical and operational recommendations

Write-up of existing processes and better service roadmap with high level recommendations.

BWoW - Benefits Realisation

Purpose

The purpose of the study is to develop a joint understanding of the business and financial criteria against which the Contact Centre and Workforce Planning service pilot can be measured and to then run the evaluation of a pilot based upon these criteria.

Study Structure:

Pre Pilot

Preparation& Kick Off

Make arrangements for Kick Off, Business Overview Meeting and DILOs with CQC.

DILO with field workers & office based staff

Two days on site with a mixture of field and offices based staff focusing on their end to end activities in order to understand existing processes / pain points / inefficiencies.

Write-up & create recommend evaluation criteria and schedule

Write-up DILO output and prepares evaluation criteria, schedule pilot with CQC and distribute to pilot participants.

Pilot Execution

Data gathering (weekly)

Ensure pilot participants fill in the evaluation sheets and return them to the agreed collection point.

Clinics (weekly)

Provide weekly drop in clinics for pilot participants to discuss any issues/feedback they have.

Data Collation & Summation

Carry out analysis of incoming data to spot trends and highlight any areas which may have been missed and adjust selection criteria if required.

Benefits Realisation Output

Executive Summary & Company Background

High level predicted benefits, summary of findings, company strategy, history, senior stakeholders.

Purpose and Scope of Study

Key drivers, tactical focus, strategic focus, pain points, known/unknown – issues. Scope of study, number of interviews, DILOs.

Current Ways of Working

As-is process, customer interaction/touch-points, tools/systems. Level of mobility, email, managed services.

Business Analysis

What works, what doesn't work, what can be improved?

Evaluation Results & Cost Savings

Feedback against criteria, savings where possible, device/application recommendations, success criteria).

Further Recommendations

Quick wins, medium to long term phasing, solutions road map, key milestones.

CQC Contact Centre and Workforce Planning Solution Overview

Vodafone is pleased to propose its storm platform to meet the Authority's requirements for a cloud-based contact centre solution based in the United Kingdom.

The storm service is not delivered over the PSN network and the service instance is dedicated to the Authority. Therefore the Contractor shall deliver against the Authorities requirements and provide all appropriate information to ensure the Contractor's service supports the Authority in achieving PSN Compliance as a Customer of PSN via their Code of Connection.

The platform was launched nine years ago in partnership with Content Guru. Today, storm is one of the largest platforms of its kind in the world with over 50,000 active users in the UK. Through storm's extensive toolkit of communication applications, we provide services for mission critical applications for our end-user organisations. As a result of the cloud model, the entire storm portfolio of products can be made immediately available to any customers once they have a partition on the platform.

The Authority's Contact Centre business requirements are detailed in the table below:

Serial	Requirement	Compliance
H01	The solution will provide a single user interface for agents to handle customer contacts via call, email and social media based on their skill, task prioritisation and queue volumes.	Compliant
H02	The solution will provide searchable recording of calls handled by the contact centre.	Compliant
H03	The solution will provision for contact centre monitoring, allowing for the understanding of productivity to support accurate resource forecasting in the front environment.	Compliant
H04	The solution will have a provision for flexible demand forecasting over all front and back office operations, this will include modelling to understand the impact of potential change.	Compliant
H05	The solution will enable CQC to offer self-service functionality for staff and will monitor adherence to all defined, agreed and approved plans.	Compliant
H06	The solution will provide for the generation of detailed management information which can be used for performance management, workload monitoring, and future resource planning and financial evaluation of individual activity components, supportive of budget development.	Compliant
H07	The solution will interface with other CQC systems, including SQL based information systems and databases, to support single data entry.	Compliant
H08	Relevant training and project management support for implementation period will be provided for appropriate CQC staff.	Compliant

Table 1: Contact Centre – Business Requirements

The Authority's Contact Centre functional requirements are detailed in the table below:

Serial	Requirement	Compliance
CS01	Call Distribution – The system will have the ability to provide a multi-level editable IVR and queue management system, allowing skills based routing of inbound calls. Inbound number recognition is required to enable personalised routing of calls to specific agents / groups of agents. The system will allow agents to consult with internal / external colleagues during the call, transfer calls to numbers external to CQC, to groups of agents with differing skill sets and re-enter calls into IVR queues.	Compliant
CS02	Call back management – The system will provide customers an option to request a call back should there be no agents available. The system will be able to detect the caller's number, if not withheld, plus allow customers to input an alternative number through the keypad. The system should allocate call back tasks to agents when available. Ability to select a preferred time frame for call back based on forecast, capture enquiry topic through option selection or voicemail, plus ability to extend call back functionality outside of normal opening hours is required.	Compliant
CS03	Call recording – The system will record all inbound, outbound and transferred calls handled by agents. Recorded calls need to be held for a minimum of 6 months, downloadable in a variety of file formats and be searchable by time, date; phone number, agent name and CRM generated enquiry number where possible. Calls should be auto-deleted after retention period with exemptions defined by business rules (e.g. Calls transferred to Samaritans). The system will be able to archive call recordings to a secure location on CQC central drives. Access to call recordings must be variable dependent on role, allowing agents to access their own calls where appropriate	Compliant
CS04	Email distribution: The system will be able to provide automated distribution of emails from more than one CQC mailbox. The system will apply phrase / keyword and attachment recognition to inbound emails to allow prioritisation, categorisation and routing based on editable CQC business rules. Recognition of customer email accounts and appropriate skills based routing should be possible. The system should also be able to provide customers with an automatic response containing the CRM generated enquiry number as a reference for the customer, both during and outside of working hours. The system will support the effective management of 'pending' emails within service levels, alerting agents and managers to messages sitting outside of service expectations.	Compliant

CS05	Social media: The system will provide a work flow system for assigning incoming queries to agents or teams that keeps the integrity of threaded messages, prevents agent collision, supports public/private interactions and allows easy access to original post and share with others outside of the dashboard functionality. A prioritisation system for incoming messages (flag VIP messages), a tagging system and ability to mark sentiment is also required. The system will have an approval system that allows approval sampling and should access the Twitter firehose and Facebook equivalent/be an approved partner. It should also integrate with CRM.	Compliant
CS06	Web Chat: The system should have the capacity for CQC to introduce web chat functionality in future to allow for customer services expansion and improvement. Any web chat functions should mirror others within the system with regards to allocation of tasks and provision of management information.	Compliant
CS07	Information provision to Agents The system shall allow editable messaging though the agent desktop, to inform of scheduled and live activity, service levels, own performance and urgent operational messages. Display of operational messages on front office wall boards. The system should have capacity to support consistent customer responses, including templates / scripting for calls and emails and ability to add links to key policy documents. Provision of a quick dial list for agents, which can be centrally managed by systems administrators.	Compliant
CS08	Navigation and Basic Views for End users - The system shall be user friendly and have a high standard of usability e.g. offers access related to roles, variable screen and function tailored to role/tasks, simple help options, minimum clicks to get to key in information. The system should support flexible agent utilisation across multiple customer service channels within the same user interface / desktop.	Compliant
CS09	"Systems Integration: System must be able to connect to CQC's Oracle Siebel CRM system (either via a dedicated connector or through Siebel's Out of the Box CTI connectors). It should also be future proof by integrating any other platform via native connection and/or our ESB solution (Mulesoft). The solution is also required to be compatible with the Siebel Open UI framework (IP2013 and IP2014). The integration with CRM should include all the required data for provision of customer recognition, display of past and pending customer interactions, and auto population of CRM enquiries (Service Requests) with relevant contact information and auditable records of actions taken by agents.	Compliant
CS10	Quality & Satisfaction monitoring: The system will allow for varied customer feedback capture across all contact methods	Compliant

with associated reporting capacity by individual / team, query type and contact method. The system should alert managers to customer requests for call back / additional contact, allowing for complaint resolution.

The system must allow remote monitoring of live calls from any location, in addition to the evaluation of call recordings against quality criteria. Individual results should be accessible to agents and reporting available for managers by individual, team, query type and contact method to allow for internal development and improvement of customer experience.

Table 2: Contact Centre – Functional Requirements

The Authority's Workforce Optimisation functional requirements are detailed in the table below:

Serial	Requirement	Compliance
WF01	Resource Planning - The system suggests the 'best fit' for resource planning based on using a variety of CQC criteria e.g. availability, demand activity profiles, key skills and CQC business rules and other related HR data. This will need to be able to consider inputs for all front and back office staff resources.	Compliant
WF02	Desktop Process Monitoring/process analytics – functionality should be available to support future development of back office resource planning against delivery expectations, considerate of actual productivity achievements to aid accurate forecasting model production. This should include repeated intervention flagging to help drive continuous improvement focus.	Complaint
WF03	Scheduling Management - The system will be capable of creating, amending, planning, modelling and optimising 'real time' or short term scheduling activities, work load forecasting to identify resource shortfalls, optimise scheduling activities and manage live schedule adherence. Resultant individual schedules should be displayed within agent desktop and provide activity reminders or alerts for agents. An equivalent back office desktop must be available for those staff not linked directly to front line services.	Compliant
WF04	Demand Profile and Forecasting- The system will have the capability to model or forecast and optimise scenarios over the short and long term (based on current workforce, what if or predicted workforce) scenarios to identify real or potential resource shortfalls. Providing CQC with the functionality to create optimal baseline workforce teams by staff type, skill mix, availability, staffing levels and working patterns to understand and assess resource or staff demand; to support optimal scheduling activities, planning and recruitment strategies.	Compliant

Serial	Requirement	Compliance
WF05	Configuration Business Rules - The system will support the creation, reconfiguration by CQC staff and the application of business rules (based on CQC central policies and local practice). It shall be flexible to allow the structured updating of activity coding, business rules and policies with a facility to allow a control manual override, where appropriate.	Compliant
WF06	Self Service - The system will support multiple access routes via CQC systems, internet, intranet, personal and mobile devices to designated system resources to provide two way flows of information enabling interaction and communications for NCSC staffing to support planning and scheduling. The system will allow for automated annual leave requests, flexible working requests, shift swap and manual adjustments based on business rules across front and back office teams.	Compliant
WF07	Management Information, Dashboard and Reporting - The system will have a wide range of standard reports and dashboards, that can be tailored and re-configured easily to fit CQC requirements for previous, current and modelled activities. This must include; individual and team performance data for front and back office; schedule adherence; attendance data; customer experience metrics such as response times, transfer volumes and first point resolution rates. Access to data should be restricted by role and the system capable of auto delivery of configurable role-based performance scorecards. Real time views of activity across all front office work streams are required to allow intraday management of performance and service levels. Editable data sets to be displayed on wall boards and screens. The system must be able to receive, analyse and integrate with data sets produced by existing CQC reporting repositories (ie OBIEE data warehouse) to allow for any comparative analysis requirements.	Partially Compliant
WF08	Commercial Information - The system will be capable of producing cost per transaction detail at functions, department and interaction levels. Outputs will be supportive of budget development and commercial forecast monitoring.	Partially Compliant

Table 3: Contact Centre – Workforce Optimisation Functional Requirements

The Authority's Contact Centre Non-functional requirements are detailed in the table below:

Serial	Requirement	Compliance
N01	System Access — System will be able to be accessed from multiple locations to support business continuity and developing initiatives such as home-working, expanding business delivery.	Compliant
N02	System availability – Any system is required to meet service availability levels of 99%, Monday to Friday 5 days a week with	Compliant

	the exception of bank holidays (to support current working hours of 8.30 until 5.30), with CQC/supplier system maintenance or capacity to expand outside these working hours on demand.	
N03	Required server environments – The following server environments are required Live, Test, Forecasting and Training.	Compliant
N04	Integration with current and future CQC operating systems - standard browsers and mobile technologies, Microsoft GUI standards must be applied. CQC standard build has available - IE 10, Firefox and Google Chrome, Office 2010, Java V1.6.0_22, Active X V7/8/10 and 11.	Compliant
N05	Technical Support – To include technical design documents for each component of service. Access to technical support services to be available 5 days a week, with capacity to expand outside these working days on demand.	Compliant
N06	Service levels to meet the below requirements as closely as possible:	Compliant
N07	Level 1 incidents (full system outage): Respond and fix within 4 hours	Partially Compliant
N08	Level 2 incidents (partial system outage) Respond and fix within 8 hours	Partially Compliant
N09	Level 3 requests (changes, addition/deletion requests) actioned within 72 operational service hours	Partially Compliant
N10	Training Support – Will underpin the solution delivered to CQC and be tailored for all levels of interaction and roles	Compliant
N11	Disaster recovery – System will be supported in the event of a disaster and any recovery plans will be tailored to CQC needs and be compliant with business continuity standards.	Compliant
N12	Recovery time & point objective – Minimal recovery time with optimal recovery points.	Compliant
N13	Storage - System will handle increase in call recording, database and report server storages without major system changes or data migration activities. Audit trail functionality should be in-built.	Compliant
N14	System scalability - System shall be scalable both in terms of users and storage, with easy to change both in terms of cost and minimal disruption.	Compliant

Table 4: Contact Centre – Non Functional Requirements

For more information please refer to Appendix 3 - Annex 1 - CQC Lot 2 Method statement.

Resource plan

Provide a complete resource plan for the delivery of the Specification including details of the team involved what these individuals will be doing and why these individuals are suitable for this requirement.

Response:

Key to the success of CQC's solution delivery and the outcomes expected will be effective contract management, programme management, service management and governance.

For the purpose of Clause 20.1 of the PSN Framework Schedule 14 Call Off Terms – Appendix 2 Representatives and Key Personnel as set out in schedule 2.1 service levels, related remedies and performance monitoring of the Call Off Terms Vodafone nominated Contractor Representatives are:

- Helen Freestone – Head of Regional Sales Public Sector
- Neal Quinn – Client Manager
- David Porter – Unified Communications & Customer Interaction Business Development Manager

In accordance with clause 26.5 of the PSN Framework Schedule 14 Call Off Terms – Appendix 2 Representatives and Key Personnel level 1 escalation in relation to dispute Vodafone nominated Contractor Representatives are:

- Colin Holt – Service Manager

The Vodafone implementation team will be led by a Programme Manager who will work with the CQC Project Board to provide:

- Continuous alignment of the project with strategic business and organizational objectives.
- Ensure that each project work stream is delivered on time, within budget, to the appropriate quality and agreed standards to ensure that CQC realise its projected business outcomes.
- Proactive engagement and strong focus on CQC stakeholders in regard to the project's progress.

The Vodafone Programme Manager will be the single point of contact and take ownership for the delivery of the proposed solution. The Programme Manager will report into the Project Board which would be made up of sponsors from Vodafone and CQC.

In accordance with Paragraph 3.1 of Schedule 6.1 Governance of the Call-Off Terms Vodafone would propose the following board structures and representations:
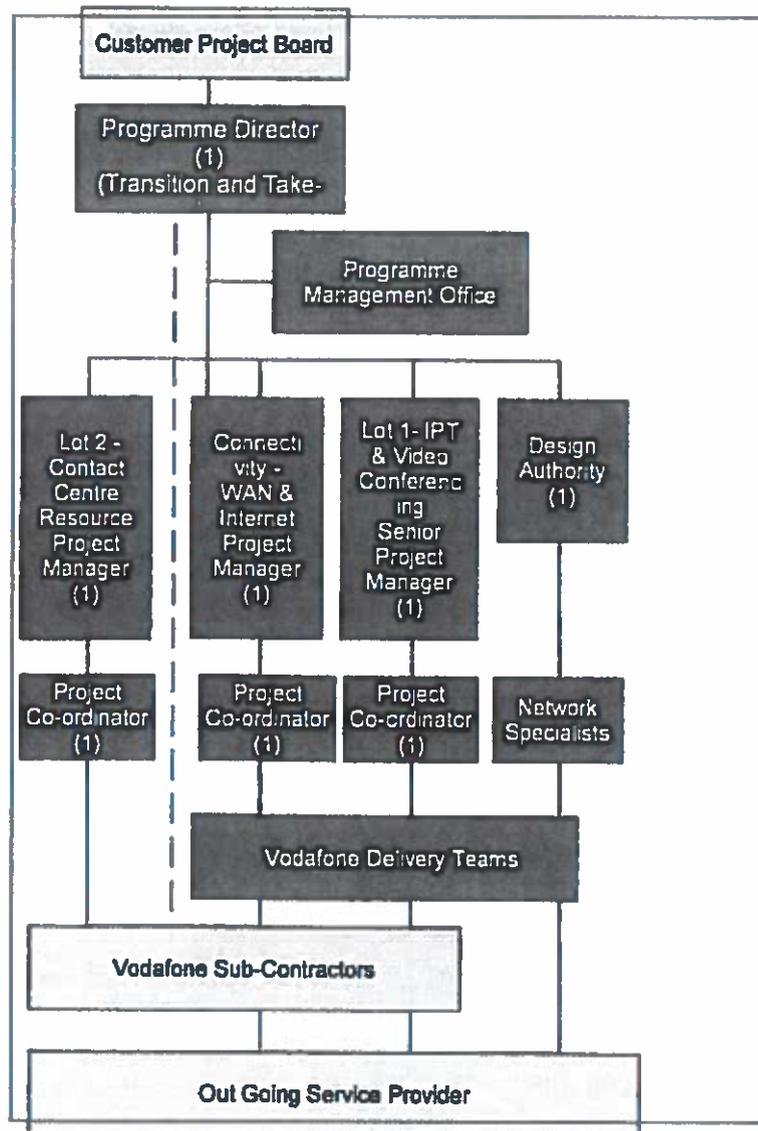
Care Quality Commission Project Organisation

- Customer Project Board
- Programme Director (1) (Transition and Take-
- Programme Management Office
- Lot 2 - Contact Centre Resource Project Manager (1)
- Connecti vity - WAN & Internet Project Manager (1)
- Lot 1- IPT & Video Conferenc ing Senior Project Manager (1)
- Design Authority (1)
- Project Co-ordinator (1)
- Project Co-ordinator (1)
- Project Co-ordinator (1)
- Network Specialists
- Vodafone Delivery Teams
- Vodafone Sub-Contractors
- Out Going Service Provider

Figure 5: your project management team is tailored to cover all your needs

Below are some example CVs of Vodafone programme and project managers:

Programme Manager CV

Profile

APMP and PRINCE 2 qualified with 10 years' experience across blue chip organisations with a successful track record of delivering IT infrastructure and business change projects and programmes to defined time, cost and quality criteria. Experienced in managing complex customer / supplier relationships, with excellent leadership and organisational skills supported by strong stakeholder management / team building aptitudes.

Strengths include planning, prioritising and decision making supported by a pragmatic

approach and first class communication skills. Adept at engaging all levels of seniority with a strong understanding of project and programme governance, quality control and change management disciplines.

Qualifications

- — APMP
- — Prince 2
- — Siemens certified project manager
- — Familiar with different methodologies eg: Agile

Career history

Xxxx ltd

Programme manager for Network Optimisation Programme
Programme Manager

- — Transform the DISC network and telephony estate and deliver cost savings - including WAN upgrade; LAN refresh; Deployment of IPT services across the transformed network; PSN compliance and security accreditation to restricted IL3; transform video end points in scope

- — Regular attendance at the programme board

- — Managing a team of 2 senior Project Managers and 11 project managers across the supply chain

- — Overseeing delivery of all activities across the programme

- — Responsible for Senior stakeholder management

- — Defining and delivering programme closedown activities to a successful outcome

- — Responsible for a combined budget of 11M with responsibility of P&L management including incremental programme opportunities

Senior Project Manager

IP Telephony solution across the Ministry Of Justice (MoJ) estate

- — Transform the MoJ HMCTS legacy telephony service to an Internet Protocol Telephony (IPT), Pan Government Accredited (PGA), Public Services Network (PSN) hosted solution across ~36000 users and ~460 sites

- — Responsible for a budget of 4M with responsibility of P&L management including incremental project opportunity

- — Leading a team of 9 PM's and with a wider team of ~ 110 SME's made up from resources across 4 organisations (Atos, BT, Siemens and the MoJ)

- — Development and implementation of communications and stakeholder management strategy including government departments and the Judiciary

- — Multiple supplier management ensuring delivery to contracted quality and time criteria

- — Delivery of Service Management (ITIL) processes ensuring successful operational

acceptance

Line management of 1 senior project manager and 2 project managers

- Responsible for appraisals, objective setting, personal issues, development plans, absence management

Programme Lead delivering North West Europe (NWE) cluster element of Siemens Glob services transformation

- Delivery of End User Computing transformation (CQC, Active Directory, Email, Account Group and Share Management) to all Siemens users across Sweden, Denmark and Finland

- Leadership of in-country / remote project teams (3 lead PMs, 4 workstream PMs and up to 14 SMEs)

- Service Desk and Operational Framework transformations across the three countries.

- Stakeholder management through timely and targeted communication, meetings, workshops and presentations to a broad range of stakeholders, including CQC, NWE Operations Management, local operations management, Account Management and Project Board up to Executive Management Team

- Responsible for a transformation budget of 3.4M Euros across all countries in scope

- Proactively managed risk through regular workshops and reviews both internally and jointly with the CQC

Project Manager CV

Profile

An experienced projects & programmes professional with proven Telecom & IT Programme/Project Management skills developed over the past 25 years .Worked in both the Public and Private sector as both a customer and a supplier

Qualifications

- Prince 2
- Familiar with different methodologies eg: Agile
- Security Status SC cleared

Skills

Proven Telecom & IT Programme/Project Management skills developed over the past 25 years in the Telecom/IT industries.

Proven Customer Service Management skills gained in an outsourced contract environment including TUPE transfer.

Detailed knowledge of process and procedure development within "service provider"

organisations

Proven bid management / tender response experience both in the Public and Private Sector.

A broad technical knowledge and understanding of the following technologies IP, VOIP, Wireless (Point to Point & Point to Multi Point), LAN & WAN technologies / architectures, VPN's, voice networking, Broadband solutions, Contact / Call Centres, PC's, Wintel Servers and storage area networks

Recent projects

Jan 14 – Today - GCF to PSN Transition

Leading the Vodafone Transition team migrating the existing███████████ to PSN at IL2, IL3 and IL4. (588 Public Sector Customers).

 Nov 12 – Dec 13 – Public Sector Pre Sales

Supporting the Public Sector Account teams by providing advice on Transition methodology and Project Management approach for large programmes. Manage a team of Pre-Sales Project Management consultants.

2011 – 2012 – Various public Sector Programmes

███████████– Replacement of the Call Centre infrastructure and migration of their truncated 0845 46 47 from BT to Cable & Wireless

██████- Back Office expansion – consisting of the upgrade of network capacity into all of ███████Call Centre sites without interruption to existing services.

2007 – 2011 – Network Transformation Programme Lead

Working for███████d a Project team including 3 Project Managers, Solution designer and Administrators replacing the WAN (EFM & BGADSL), LAN, WLAN & Voice infrastructure in 2500+ stores throughout the UK & Republic of Ireland.

 2003 – 2007 – Programme Director – Lincolnshire County Council

Managed a £15m Broadband & ICT Support Project incorporating the deployment of a county wide, 38 site, wireless network and support to over 1000 Private sector companies in Lincolnshire.

Project Management Overview

Vodafone Programme & Project Management Framework known as One Way of Delivery (OWOD) has been developed from MSP & PRINCE2 with positive feedback from our CQCs. It provides an outline approach, tailored by the Programme or Project Manager to meet the needs of CQC and the objectives of every programme or project. We only use the process and tools which are directly applicable and required for the requirement at hand, saving time and ensuring we are on target with your objectives.

It is framework which:

- Allows all sizes and types of Programmes and Projects to be delivered using a consistent set of processes and templates.
- Provides Governance appropriate to the size and complexity of the Programme / Project.
- Allows local variations to operate by the use of overlays relevant to the Business Unit or Delivery Unit.

The framework will provide improvements in simplicity, clarity, consistency and coherence by:

- Using a single approach for all types of Programmes and Projects.
- Providing a clear differentiation between Programmes and Projects.
- Providing clear guidance on the definition of delivery type and associated Governance.
- Using a common language (based on the OGC suite – Managing Successful Programmes - MSP, PRINCE2 and P30.)
- Removal of multiple methods and frameworks.
- Having the ability to produce far more meaningful Management Information and trend analyses to support decision making in delivery.

Above all, this will help us achieve more successful and controlled delivery to CQC.

The key elements of our Project Management Framework include:

- **Risk Assessment** - Identifying the key benefits of the project to CQC; assessing the level of risk and developing risk mitigation strategies.
- **Right Resources** - Creating a project-specific organisation, showing the structure of the project; the people involved; their role in the project team; what they will be doing; and most importantly, their outcomes which they will achieve.
- **Detailed Planning** - We will have a joint Project Definition Workshop (PDW) to define / review and agree on the project approach and scope with your team.
- **Management Overview** - Including management and team reviews, reports on project status and progress, documentation of project initiation and closure - tracking, monitoring and ensuring everything is done properly.
- **Quality Assurance** - Making sure we deliver our promises made to you and your business requirements.
- **Communication** - Keeping you informed, making sure we keep all key stakeholders informed, from both organisations, with the information they need about the project, when they need it.

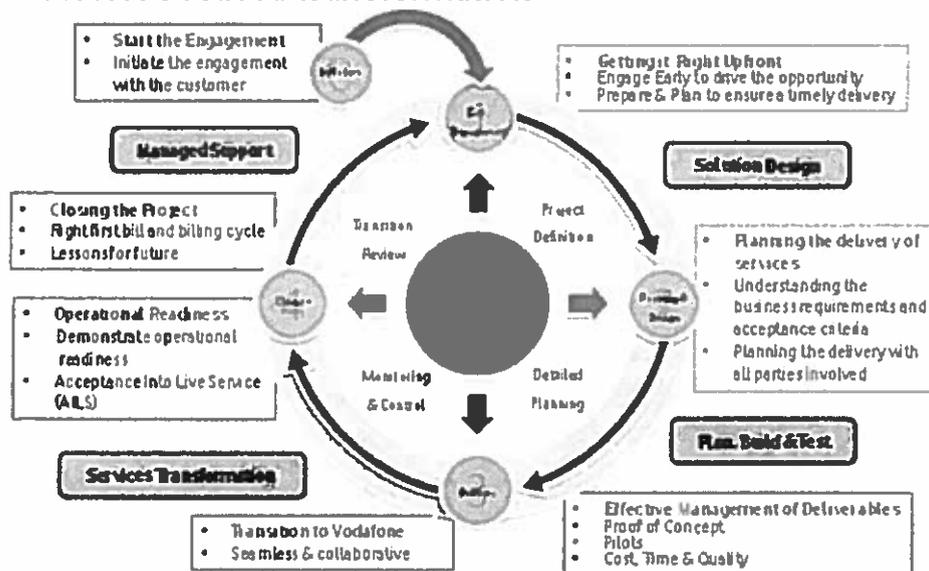**Service Focused Transformation**

Figure 6: easy, understandable and fully controlled lifecycle

The Vodafone Project Life Cycle described in the diagram above and in the following paragraphs provides a general overall summary of the key components of the project approach with their corresponding standard documentation set.

Vodafone Project Managers are required to work together with CQCs to customise and agree the documentation that fits the CQC's company policy and business requirement while maintaining our professional project management methodology.

Vodafone project life cycle - project initiation

The first key step in the initiation phase of the Project is to define and agree the project scope with CQC. The project scope defines the limits of the project - what the project includes, as well as what is specifically excluded from the project.

On approval and sign-off of the Scope, as part of the Project Initiation Document (PID), the Project Manager assumes responsibility for developing the detailed project plan and for executing the project in accordance with the PID.

The Project Definition Workshop is chaired by a Vodafone Project Manager with the CQC's help to ensure that the project is comprehensively scoped and planned with the right stakeholder(s) identified.

Vodafone project life cycle - execution

With the sign-off of the Project Initiation Document, the Project Manager is able to work according to a baseline and execute individual planned activities in full swing with their downstream suppliers, vendors and internal provisioning functions.

Regular meetings are conducted with the CQC, stakeholders and project board/sponsor to report the Project status together with the actions, changes, issues, risks, assumptions and dependencies.

The agreed Project Change Management Process will allow the Project Manager to centrally qualify and keep track of all project change requests.

For each successful CQC site migration, our Project Manager will consolidate the service inventory and reference number and handover to CQC for acceptance.

Vodafone project life cycle - transition and closure

The Project Manager is responsible for the network build, commissioning and customer migration according to the agreed migration approach and acceptance criteria developed with CQC during project initiation.

The service inventory are handed-over to CQC and the 24x7 Operations Support function with the objective to be able to identify the individual components that make up the services and transition from project to operations support stage.

The Project Manager will work in parallel with Operations Support function for an agreed "service acceptance period" to ensure seamless transition and this process will be documented using an Acceptance Into Live Service document (AILS).

Upon the last deliverable of the project, the Project Manager will chair the Project Closure Meeting with CQC and Operations Support function to identify, follow up any outstanding actions with clear owners and timeline to complete. Lessons learnt are also shared throughout the duration and at the end of Project.

Project Deliverables

As with any project methodology, the Framework is completely flexible and can be adapted to meet any specific requirements of the Customer. The following is a list of the key deliverables that comprise the project management elements as opposed to the solution. Standards for these are included with the Framework but each can be amended to suit the requirements of the project. Depending on the size, complexity and risk of the project some of the deliverables may be combined or omitted.

Standard Management Deliverable Descriptions:

- Project Mandate
- Project Brief
- Project Initiation Document
- Project File
- Project Stage Plan
- Project Implementation Plan
- Financial Approach
- Benefits Approach
- Health, Safety and Environmental Approach
- Security Approach
- Project Authority Records

-     Handover Certificate
-     Work Package
-     Standard Communication & Reporting Deliverable Descriptions:
-     Communication and Reporting Approach
-     Project Meetings
-     Checkpoint Report
-     Highlight Report
-     Exception Report
-     End Stage Report
-     Lessons Learned Report
-     End Project Report
-     Standard Quality Deliverable Descriptions:
-     Deliverable Quality Review
-     Quality Approach
-     Risk / Issue / Change Control

Outline Implementation Plan

In accordance with Paragraph 2 of Schedule 4.1 (Implementation Plan) of the Call-Off Terms, the Outline Implementation plan is proposed by Vodafone as attached at Appendix 3 - Annex 2 – Outline Implementation Plan.

We have also provided a detailed implementation plan that includes a full breakdown of the activities to be carried out together with Key Milestones. The plans are provided in Microsoft Project and PDF Formats:

2015-05-19 CQC Lot   2015-05-19 CQC Lot
2 - Contact Centre Pl 2 - Contact Centre Pl

Exit strategy & skills transfer

Describe the processes and deliverables of the exit phase of the service and how skills will be retained within the Authority.

Response:

As part of the Vodafone Transition methodology and within 3 months (or such other period as is specified in the Implementation Plan or otherwise agreed by the Parties in writing) of the contract effective date, we will deliver an Exit Plan to the Authority.

A series of meetings with relevant Authority stakeholders will be arranged to agree the content of the Exit Plan. The Exit plan will be implemented in accordance with the Exit Management strategy as defined in PSN call off Schedule 6.4. The Exit Plan will be reviewed and maintained during the lifecycle of the contract to reflect any changes to the services provided by Vodafone.

Vodafone acknowledges that Notice of Termination can be served for a variety of reasons and will reflect the different options for both Ordinary and Emergency Exit within the Exit Plan.

We will appoint a Project Manager on receipt of Notice of Termination to establish governance, attend meetings and complete all activities required for a seamless transition of services from Vodafone to the Authority and/or their new supplier.

The scope of the Exit Plan is summarised as:

- to confirm all appropriate third party and our contracts terminate or novate, as appropriate, to Customer and/or their third party supplier in line with the Service being transferred;
- to agree assets to be transferred to Customer and/or their third party supplier, agree process by which the transfer will take place and facilitate a smooth transfer;
- to agree the data and the format of the data to be transferred to Customer and/or their third party supplier;
- to confirm the Services and transfer them to either Customer and/or its third party supplier according to a schedule to be agreed by us and Customer;
- to confirm and to transfer those individuals determined to be 'in-scope personnel' in accordance with the then current Transfer of Undertakings (Protection of Employment) Regulations;
- always subject to confidentiality requirements and, where permissible, always considering our proprietary information / data, execute the transfer of applicable knowledge for the Services to enable Customer and/or their third party supplier to run the services;
- to agree and pay all outstanding payments due between the parties.

A range of professional service resource would be required to ensure successful completion of a decommissioning process. These might include:

- Program Manager
- Project Manager
- Hosting Solution Manager
- Solutions Consultant
- Hosting Design Specialist

- Technical Design Specialist
- Hosting Engineering resource (Security, Desktop, Application etc.)

We will work in collaboration with the Authority to produce a detailed project plan with the nominated service provider and will include a specific detail of transfer of equipment. E.g. secure courier to transfer equipment or secure IT Specialist.

Any equipment that needs to be disposed of will follow our secure decommission process.

Our approach to project compliance consists of several steps, all of which are designed to ensure that the project outputs are completed with the specification, proposal and plan agreed with the Authority.

We regard demonstration of compliance as starting with the project, not just an activity tagged onto the end of the implementation. The steps are therefore designed to ensure the plan and the activities to deliver it are completed with clarity, traceability and accuracy.

The compliance steps are:

- Ensure an exit plan design and schedule is agreed.

An agreed starting position, setting scope, expectation and responsibilities can be reported and tested against. Demonstrating and confirming compliance against a moveable and fluid base is impossible.

Ensure acceptance criteria are agreed

Complementing the exit plan design and schedule, the acceptance criteria to confirm compliance should be realistic and agreed.

For example acceptance criteria can be successful completion of specific tasks or agreement on a final version of specific deliverables.

Plan compliance tasks

Compliance tasks need to be managed and therefore it must be included in the project schedule and in the project quality and acceptance approach. This way project implementation will support management towards compliance.

Checkpoints

Amongst the planned compliance tasks will be checkpoints where actual status of the exit plan is reviewed against agreed baseline and acceptance criteria. The review will allow opportunities to discuss progress, issues and changes within the context of impact on the overall exit plan.

Reporting

Project delivery status reports will be produced each week. The reports will capture progress to date against milestones, deliverable status and highlight issues/risks associated with delivering the exit plan. The reports ensure regular visibility and communication of progress against the Exit Plan demonstrating compliance and ensuring deviation is only agreed via managed processes. These reports will provide input to the checkpoints.

At the conclusion of our activities, an Exit Plan completion report will be produced summarising the actions and outputs completed and providing a high-level audit trail and confirmation for the Authority.

Exceptions will be managed via change management

During design, planning and implementation of the Exit Plan, especially with potentially input from several parties, it is inevitable additional items or alternatives to agreed ones will arise. These will be managed via an agreed Change Management process that will ensure changes to the Exit Plan are only made after impact analysis; solution definition and estimation are completed and agreed.

Deliverables

We expect the following Exit Plan deliverables will be required. The deliverables have been categorised as three types:

- **Commercial**: deliverable that defines the commercial coverage required for our exit plan activities
- **Planning and Design**: deliverables that detail the activities, approach, solution and timeframes for the exit plan
- **Implementation**: deliverables produced through execution of the exit plan.

This list of deliverables is based on current knowledge of what may be appropriate. It will change and can only be confirmed once requirements for the Customer replacement service provider are agreed.

Commercial

Commercial proposal based on confirmed exit requirements for planning, designing and implementing the Authority exit plan.

This will need to be produced and agreed prior to exit plan design, planning and implementation. There will be an associated cost to this work.

The Exit Plan Proposal deliverable will include a high-level project schedule; approach and resource plan to meet the confirmed the Authority Exit Plan requirements.

Planning and Design

- Project schedule; a detailed project schedule for our activities (e.g. MS Project plan) that integrates with the Authority and replacement contractor schedules.
- Project Initiation Document (PID); Project Management asset detailing the project delivery approach, communication plans, quality approach, reporting and governance we will use to define and execute the exit plan.
- Exit Plan Design; a specification and detailed design of the activities in response to requirements. This will include definition of security, technical, operational and knowledge activities related to the exit.
- Exit Plan; a specification for the test and verification approach and methods that will be applied to ensure outputs are of required quality and integrity.

Implementation

- Customer Operations Guide; a document describing the tasks, activities and dependencies that delivery of the Managed Service requires, supporting knowledge

transfer and service transition. This will essentially be a collection of all relevant Local Work Instructions (LWI).
  – Solution Design Document (SDD); the SDD which will include details of:
The versions of all the software components used to deliver the latest version of the Customer production environment.

Note that this may not be required if a Customer is to be delivered by different software.

  – Open service desk tickets; a documented record of the open service desk tickets at time of transfer
  – Exit Report(s); a documented report that confirms the output, identifying any issues and confirming successes.
  – Exit Plan Completion Report; design and execution of application transfer, including data and knowledge transfer.
  –

Knowledge Transfer

Both the Authority and the new service provider will require training in the continued provision of service and this will be supported by Vodafone.

This will involve:

  – Assessing the training requirement with the Authority and new provider;
  – Creation of training material
  – Delivery of training.

We suggest that the knowledge transfer tasks will be delivered through a set of workshop activities and subsequently support will be made available for clarification and confirmation of points not covered in the initial knowledge transfer.

The workshops will be conducted as briefing sessions and meetings, with documentation and the Authority's system available as reference materials.

It will be necessary to provide training for key members of the Replacement Contractor's personnel in connection with the continuation of the provision of the Managed Service. Key roles are identified as follows for attendance at a series of training workshops.

  – Sales and support technical staff
  – Support desk staff
  – Commercial and Billing staff
Closure

In summary, we will appoint the appropriate resource to support the transition using our robust methodology and governance processes to provide the Authority with a seamless transfer to their new service provider. We will be available for an agreed period to answer any questions until such time as joint agreement is reached between both parties that all activities have been completed and we can confirm project closure.

ANNEX 1

LOT 2 METHOD STATEMENT

CQC Lot 2 CC
Method Statement.dc

Care Quality Commission (CQC)

CQC Reference CQC ICTC 23b

Contact Centre Software & Workforce Planning System

PSN Services Framework (RM1498)

Method Statement

Table of Contents

Table of Figures

List of tables

1. Introduction

Vodafone is pleased to propose its storm platform to meet the Authority's requirements for a cloud-based contact centre solution based in the United Kingdom.

The storm service is not delivered over the PSN network and the service instance is dedicated to the Authority. Therefore the Contractor shall deliver against the Authorities requirements and provide all appropriate information to ensure the Contractor's service supports the Authority in achieving PSN Compliance as a Customer of PSN via their Code of Connection.

The platform was launched nine years ago in partnership with Content Guru. Today, storm is one of the largest platforms of its kind in the world with over 50,000 active users in the UK. Through storm's extensive toolkit of communication applications, we provide services for mission critical applications for our end-user organisations. As a result of the cloud model, the entire storm portfolio of products can be made immediately available to any customers once they have a partition on the platform.

The Authority's Contact Centre business requirements are detailed in the table below:

Serial	Requirement	Compliance
H01	The solution will provide a single user interface for agents to handle customer contacts via call, email and social media based on their skill, task prioritisation and queue volumes.	Compliant
H02	The solution will provide searchable recording of calls handled by the contact centre.	Compliant
H03	The solution will provision for contact centre monitoring, allowing for the understanding of productivity to support accurate resource forecasting in the front environment.	Compliant
H04	The solution will have a provision for flexible demand forecasting over all front and back office operations, this will include modelling to understand the impact of potential change.	Compliant
H05	The solution will enable CQC to offer self-service functionality for staff and will monitor adherence to all defined, agreed and approved plans.	Compliant
H06	The solution will provide for the generation of detailed management information which can be used for performance management, workload monitoring, and future resource planning and financial evaluation of individual activity components, supportive of budget development.	Compliant
H07	The solution will interface with other CQC systems, including SQL based information systems and databases, to support single data entry.	Compliant
H08	Relevant training and project management support for implementation period will be provided for appropriate CQC staff.	Compliant

Table 1: Contact Centre – Business Requirements

The Authority's Contact Centre functional requirements are detailed in the table below:

Serial	Requirement	Compliance
CS01	Call Distribution – The system will have the ability to provide a multi-level editable IVR and queue management system, allowing skills based routing of inbound calls. Inbound number recognition is required to enable personalised routing of calls to specific agents / groups of agents. The system will allow agents to consult with internal / external colleagues during the call, transfer calls to numbers external to CQC, to groups of agents with differing skill sets and re-enter calls into IVR queues.	Compliant
CS02	Call back management – The system will provide customers an option to request a call back should there be no agents available. The system will be able to detect the caller's number, if not withheld, plus allow customers to input an alternative number through the keypad. The system should allocate call back tasks to agents when available. Ability to select a preferred	Compliant

time frame for call back based on forecast, capture enquiry topic through option selection or voicemail, plus ability to extend call back functionality outside of normal opening hours is required.

CS03	Call recording – The system will record all inbound, outbound and transferred calls handled by agents. Recorded calls need to be held for a minimum of 6 months, downloadable in a variety of file formats and be searchable by time, date; phone number, agent name and CRM generated enquiry number where possible. Calls should be auto-deleted after retention period with exemptions defined by business rules (e.g. Calls transferred to Samaritans). The system will be able to archive call recordings to a secure location on CQC central drives. Access to call recordings must be variable dependent on role, allowing agents to access their own calls where appropriate	Compliant
CS04	Email distribution: The system will be able to provide automated distribution of emails from more than one CQC mailbox. The system will apply phrase / keyword and attachment recognition to inbound emails to allow prioritisation, categorisation and routing based on editable CQC business rules. Recognition of customer email accounts and appropriate skills based routing should be possible. The system should also be able to provide customers with an automatic response containing the CRM generated enquiry number as a reference for the customer, both during and outside of working hours. The system will support the effective management of 'pending' emails within service levels, alerting agents and managers to messages sitting outside of service expectations.	Compliant
CS05	Social media: The system will provide a work flow system for assigning incoming queries to agents or teams that keeps the integrity of threaded messages, prevents agent collision, supports public/private interactions and allows easy access to original post and share with others outside of the dashboard functionality. A prioritisation system for incoming messages (flag VIP messages), a tagging system and ability to mark sentiment is also required. The system will have an approval system that allows approval sampling and should access the Twitter firehose and Facebook equivalent/be an approved partner. It should also integrate with CRM.	Compliant
CS06	Web Chat: The system should have the capacity for CQC to introduce web chat functionality in future to allow for customer services expansion and improvement. Any web chat functions should mirror others within the system with regards to allocation of tasks and provision of management information.	Compliant
	Information provision to Agents	
CS07	The system shall allow editable messaging though the agent desktop, to inform of scheduled and live activity, service levels, own performance and urgent operational messages. Display of operational messages on front office wall boards. The system should have capacity to support consistent customer responses, including templates / scripting for calls and emails and ability to add links to key policy documents. Provision of a quick dial list for agents, which can be centrally managed by systems administrators.	Compliant
CS08	Navigation and Basic Views for End users - The system shall be user friendly and have a high standard of usability e.g. offers access related to roles, variable screen and function tailored to role/tasks, simple help options, minimum clicks to get to key in information. The system should support flexible agent utilisation across multiple customer service channels within the same user interface / desktop.	Compliant
CS09	"Systems Integration: System must be able to connect to CQC's Oracle Siebel CRM system (either via a dedicated connector or through Siebel's Out of the Box CTI connectors). It should also be future proof by integrating any other platform via native connection and/or our ESB solution (Mulesoft). The solution is also required to be compatible with the Siebel Open UI framework (IP2013 and IP2014). The integration with CRM should include all the required data for provision of customer recognition, display of past and pending customer interactions, and auto population of CRM enquiries (Service Requests) with relevant contact information and auditable records of actions taken by agents.	Compliant
CS10	Quality & Satisfaction monitoring: The system will allow for varied customer feedback capture across all contact methods with associated reporting capacity by individual / team, query type and contact method. The system should alert managers to customer requests for call back / additional contact, allowing for complaint resolution.	Compliant

The system must allow remote monitoring of live calls from any location, in addition to the evaluation of call recordings against quality criteria. Individual results should be accessible to agents and reporting available for managers by individual, team, query type and contact method to allow for internal development and improvement of customer experience.

Table 2: Contact Centre – Functional Requirements

The Authority's Workforce Optimisation functional requirements are detailed in the table below:

Serial	Requirement	Compliance
WF01	Resource Planning - The system suggests the 'best fit' for resource planning based on using a variety of CQC criteria e.g. availability, demand activity profiles, key skills and CQC business rules and other related HR data. This will need to be able to consider inputs for all front and back office staff resources.	Compliant
WF02	Desktop Process Monitoring/process analytics – functionality should be available to support future development of back office resource planning against delivery expectations, considerate of actual productivity achievements to aid accurate forecasting model production. This should include repeated intervention flagging to help drive continuous improvement focus.	Complaint
WF03	Scheduling Management - The system will be capable of creating, amending, planning, modelling and optimising 'real time' or short term scheduling activities, work load forecasting to identify resource shortfalls, optimise scheduling activities and manage live schedule adherence. Resultant individual schedules should be displayed within agent desktop and provide activity reminders or alerts for agents. An equivalent back office desktop must be available for those staff not linked directly to front line services.	Compliant
WF04	Demand Profile and Forecasting- The system will have the capability to model or forecast and optimise scenarios over the short and long term (based on current workforce, what if or predicted workforce) scenarios to identify real or potential resource shortfalls. Providing CQC with the functionality to create optimal baseline workforce teams by staff type, skill mix, availability, staffing levels and working patterns to understand and assess resource or staff demand; to support optimal scheduling activities, planning and recruitment strategies.	Compliant
WF05	Configuration Business Rules - The system will support the creation, reconfiguration by CQC staff and the application of business rules (based on CQC central policies and local practice). It shall be flexible to allow the structured updating of activity coding, business rules and policies with a facility to allow a control manual override, where appropriate.	Compliant
WF06	Self Service - The system will support multiple access routes via CQC systems, internet, intranet, personal and mobile devices to designated system resources to provide two way flows of information enabling interaction and communications for NCSC staffing to support planning and scheduling. The system will allow for automated annual leave requests, flexible working requests, shift swap and manual adjustments based on business rules across front and back office teams.	Compliant
WF07	Management Information, Dashboard and Reporting - The system will have a wide range of standard reports and dashboards, that can be tailored and re-configured easily to fit CQC requirements for previous, current and modelled activities. This must include; individual and team performance data for front and back office; schedule adherence; attendance data; customer experience metrics such as response times, transfer volumes and first point resolution rates. Access to data should be restricted by role and the system capable of auto delivery of configurable role-based performance scorecards. Real time views of activity across all front office work streams are required to allow intraday management of performance and service levels. Editable data sets to be displayed on wall boards and screens. The system must be able to receive, analyse and integrate with data sets produced by existing CQC reporting repositories (i.e. OBIEE data warehouse) to allow for any comparative analysis requirements.	Partially Compliant
WF08	Commercial Information - The system will be capable of producing cost per transaction detail at functions, department and interaction levels. Outputs will be supportive of budget development and commercial forecast monitoring.	Partially Compliant

Table 3: Contact Centre – Workforce Optimisation Functional Requirements

The Authority's Contact Centre Non-functional requirements are detailed in the table below:

Serial	Requirement	Compliance
N01	System Access -- System will be able to be accessed from multiple locations to support business continuity and developing initiatives such as home-working, expanding business delivery.	Compliant
N02	System availability - Any system is required to meet service availability levels of 99%, Monday to Friday 5 days a week with the exception of bank holidays (to support current working hours of 8.30 until 5.30), with CQC/supplier system maintenance or capacity to expand outside these working hours on demand.	Compliant
N03	Required server environments - The following server environments are required Live, Test, Forecasting and Training.	Compliant
N04	Integration with current and future CQC operating systems - standard browsers and mobile technologies, Microsoft GUI standards must be applied. CQC standard build has available - IE 10, Firefox and Google Chrome, Office 2010, Java V1.6.0_22, Active X V7/8/10 and 11.	Compliant
N05	Technical Support - To include technical design documents for each component of service. Access to technical support services to be available 5 days a week, with capacity to expand outside these working days on demand.	Compliant
N06	Service levels to meet the below requirements as closely as possible:	Partially Compliant
N07	Level 1 incidents (full system outage): Respond and fix within 4 hours	Partially Compliant
N08	Level 2 incidents (partial system outage) Respond and fix within 8 hours	Partially Compliant
N09	Level 3 requests (changes, addition/deletion requests) actioned within 72 operational service hours	Compliant
N10	Training Support - Will underpin the solution delivered to CQC and be tailored for all levels of interaction and roles	Compliant
N11	Disaster recovery - System will be supported in the event of a disaster and any recovery plans will be tailored to CQC needs and be compliant with business continuity standards.	Compliant
N12	Recovery time & point objective - Minimal recovery time with optimal recovery points.	Compliant
N13	Storage - System will handle increase in call recording, database and report server storages without major system changes or data migration activities. Audit trail functionality should be in-built.	Compliant
N14	System scalability - System shall be scalable both in terms of users and storage, with easy to change both in terms of cost and minimal disruption.	Compliant

Table 4: Contact Centre - Non Functional Requirements

2. Overview of Vodafone storm

storm is the world's largest communications integration platform, able to offer the Authority 99.999% availability and ISO27001-accredited security across all of its contact centre operations. The platform is shared by thousands of end-user organisations, but every single organisation is provided with its own unique, secure partition. This will give the Authority access to the leading functionality available in the market today, and the Authority's partition will be tailored to its precise requirements, providing exactly the functionality and scale it needs at any given point in time. This will liberate the Authority from the capital expense and ongoing complexity of rolling out, supporting and maintaining most of the on premise hardware that would normally be associated with a project such as this. As the Authority's needs evolve over time, additional storm functionality can be bolted on to satisfy them, providing exactly the required functionality and scale for the Authority at any single point in time.

storm is an end to end modular platform. This means that we can either provide a complete telephony estate for the Authority, or the Authority can choose to adopt individual modules and migrate to the cloud in a phased approach. Over 95% of all storm customers (including large organisations such as UKPN, The Disclosure and Barring Service, The UK Home Office and others. All modules which are available on the storm platform are built in house (along with the underlying hardware) – there are no third party applications or hardware clusters (i.e. Cisco, Avaya) deployed in the storm environment. storm has a strategic relationship with Teleopti, a world leader in Work Force Management solutions, and we have built a real time, low level integration between both systems which allows us to combine the power of two best-of-breed platforms.

2.1 Architecture Overview

storm is a cloud based multi-channel IP Contact Centre solution that overlays Vodafone's One Net Enterprise Unified Communications platform to provide Contact Centre capability to Unified Client users. The platform is hosted in the Vodafone Watford and Park Royal, London data centres, and the Network Operation Control centres (NOCs) are also located within the United Kingdom.

It is designed so that incoming calls to the Contact Centre are routed through the DTMF/Speech enabled IVR to the call routing platform. The storm application makes a decision on which Agent has the appropriate skills to handle the call and the call is routed to that Agent on the Vodafone One Net platform for delivery to the Agent, regardless of their physical location. The Agent uses a web browser based application to manage the call.

A general platform architecture overview is shown in the diagram below:
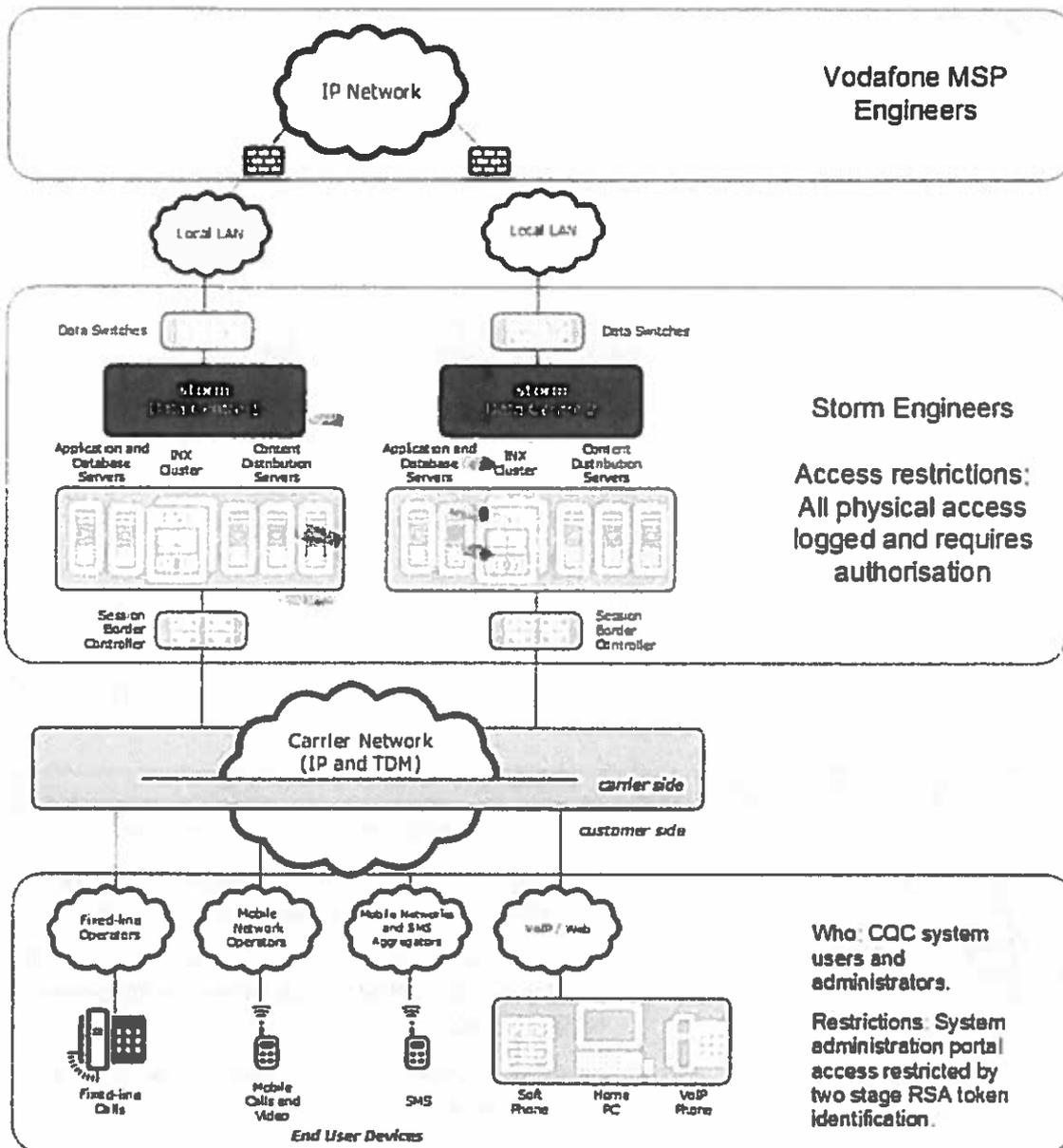
Figure 1: storm's high availability resilient Architecture

2.2 High Level Solution

The initial requirement for voice, email and social media call queuing, routing, recording, Work Force Optimisation (WFO) and reporting is all achievable out of the box through the storm modules.

Every module is individually licensed on an operational expenditure (OPEX) basis, paid per concurrent Agent, to give the Authority as much flexibility as possible in how their services are configured, meaning that they can have rapid access to the best functionality available in the market, whilst only paying for what they use. Furthermore, upgrades and maintenance are all included within Vodafone's managed service. storm is constantly being improved to ensure it remains at the forefront of enterprise communications technology. This means that the Authority will be buying into an "evergreen" platform, which can address its immediate requirements and provide a strategic roadmap for innovation long into the future.

The storm infrastructure is based on a true shared services model, with the full capacity of the platform available to end users without the associated cost of burst capacity management. storm's application layer comprises

over 30 individual modules and once the Authority's base service is configured Vodafone can activate any of these modules on demand.

storm is integrated directly into Vodafone's fixed and mobile networks, utilising next-generation SIP and also traditional SS7, GSM and other mobile protocols. storm is designed so that there are no single points of failure across multiple geographically diverse locations. Standard platform availability is 99.999%.

The service will initially be configured to support the Authority stated number of concurrent agents, as shown in the table below. However the service can be expanded as and when required to meet the Authority's maximum potential agent concurrency of 410.

Channel	Description	No of Users	Total
Single	Voice Only		
	Email		
	Social Media		
Dual	Voice & Email		
	Email & Social Media		
		Total	

Table 5: Concurrent Agent Volumes

We have included a list of the top 20 modules available on the storm platform below, and have highlighted the modules we have proposed to the Authority in purple.

Product		Description
	ACT™ Appointment Confirmation & Reminders	— Automated reminders for time-critical processes — Integration with CRM systems and databases allows automatic retrieval of critical data (e.g. appointment times etc.) — Multichannel channel capabilities across web, voice, SMS and email enable the reminder to be delivered in the customer's preferred medium
	ASK™ Snapshot Surveying	— Instant multi-channel surveying options for automated voice call, SMS, email or online — Real-time reporting interface enables users to see survey results as they come in and separate them by channel — CRM integration allows collected data to be automatically fed into CRM systems
	CONTACT™ Multi-channel Contact Centre	— Intelligent Automated Contact Distribution functionality — Easy sorting of agents into team groups and skill groups — Incoming contacts are directed to the appropriate group automatically using voice recognition or sophisticated IVR
	DIAL™ Outbound Dialler System	— Outbound dialler campaign creation — Predictive dialling, preview dialling and power dialling capabilities — Automatic performance tracking and intelligent call pacing — Fully Ofcom compliant

	DROP™ Hosted Disaster Recovery	— Complete hosted disaster recovery and service continuity solution — Complex disaster recovery rules can be preconfigured simply — Preconfigured disaster recovery rules can be activated at the click of a button via web portal
	FLOW™ Drag & Drop Service Creation	— Advanced drag & drop multimedia service creation — Drag and drop interface allows complex services to be created quickly and easily — Existing services can be modified intuitively in real time — Changes in service can be rolled out across an entire estate simultaneously
	INBOUND™ Number Management	— Intuitive number management using the point-and-click storm Service Portal interface. — IVR menu creation including auto-attendants and time-scheduled routing capabilities using a drag and drop service creation tool. — Integrated cloud-based call recording and voicemail services.
	Instant Billing Scalable Billing Application	— Inbound and outbound billing across calls, recordings, emails, SMS, voice resources, IVR and other usages — All billing processes can be instantly managed from a single web-based portal — Optional daily or monthly feed of Charge Records through FTP or SFTP
	INTEGRATE™ Link to Any External Data Infrastructure	— Flexible integration with back-end systems including CRM & WFO — CRM system integration enables the delivery of more personalised customer service — Integration with back end systems allows real-time delivery of critical information to agents and front-line workers
	LOCK Secure & Compliant Payments	— Automated or agent-assisted PCI-compliant payments — Customer can make secure payments without ever handing their card details over to another human being — Tone masking allows agent to stay on the line to offer assistance without breaching PCI regulations
	WFM: Teleopti™ Real-time, Cloud-based Work Force Management	— On-demand workforce management and statistics in the cloud — Low level 'high-touch' real time integration with the storm platform, allowing for accurate WFM MI and fully integrated telephony workforce management.

	PBX **PBX Replacement in the Cloud**	— Unified communications and corporate telephony in the cloud — Login from any location via web-portal — Sophisticated disaster recovery routing that can be activated instantly — Intelligent call forwarding and IVR
	RECORDER™ **Compliant Call Recording**	— Call recording for quality control and regulatory compliance — Recordings stored securely on ISO27001 accredited system — Recordings can be remotely accessed and reviewed via web portal
	RESPONSE™ **Multimedia Service Creation**	— Multi-channel, multimedia service creation — Remote creation of services for multiple channels using web-based portal — Real time adaptation and modification of services
	SHIELD™ **Burst Management**	— Protecting the contact centre from peaks in demand — IVR offers customers self-service in the cloud — Customers who cannot resolve enquiry via IVR are distributed to a free agent across multiple sites — Maximises customer satisfaction without overburdening contact centre infrastructure
	SHOUT™ **Mass Alerting**	— Mass alerts and notifications — Messages can be provisioned rapidly through an easy to use portal — Integration with back-end systems allows automation of the notification process — Notification recipients can be pre-configured or created on the spot
	STEER™ **Automated Speech Recognition**	— Automated switchboard using speech recognition — IVR menus, routing rules and voice prompts can be updated quickly via easy-to-use interfaces — Callers route to pre-recorded information or live agent — Callers may request to speak to live agent
	SURE™ **Automated Identification & Verification**	— Secure identification and verification — Automatic determination of landline caller location; mobile device location pinpointed using post code input via speech recognition — CTI integration displays relevant customer information on screen automatically — Information from CRM systems is used to help route the caller to the correct department quickly

	TACTIC™ Intelligent Callback and Web Chat	— Call-back request via web, SMS, or IVR — Contacts can be prioritised by channel or subject matter — Advanced IVR give customers the option of leaving contact details for call-back by an available agent at the earliest opportunity — Able to handle inbound and outbound voice, SMS and web communications
	VIEW™ Real-Time & Historical Reporting	— Real-time and historical reporting — Customisable dashboard can be tailored to personal needs — Huge variety of key metrics can be fed into and displayed via a single interface

Table 6: storm modules

Platform administration is carried out through the intuitive web based interfaces (most of which are drag and drop). Call recordings and reports can be accessed through almost any browser, and can be scheduled for automatic distribution

storm has been built from the ground up to support complete, user centralised self-service. As a result, the Authorities administrators and authorised users can adjust and manipulate any part of the storm service (i.e. complex multi-channel IVR and service flows, user accounts and adjustments, call outing and disaster recovery, automation etc.). Services are first provisioned and configured by the storm Project Management team, and once numbers are ported to the platform the services are made live instantly.

Inbound voice calls are delivered to the storm platform over the PSTN network. As storm is a multi-channel platform, any SMS, Emails, Web Chat Requests, Social Media Transmissions etc. can also be delivered to the platform and distributed to agents.

Call logic is applied in the cloud based either on dynamic or predefined logic. Calls are pushed across the Vodafone TDM Voice Network. to a predefined DDI or range of DDI's on the Vodafone One Net Enterprise - Cloud (VONE-C) platform.

The call is delivered to the VONE-C endpoint, with all routing logic having been applied at the storm level.
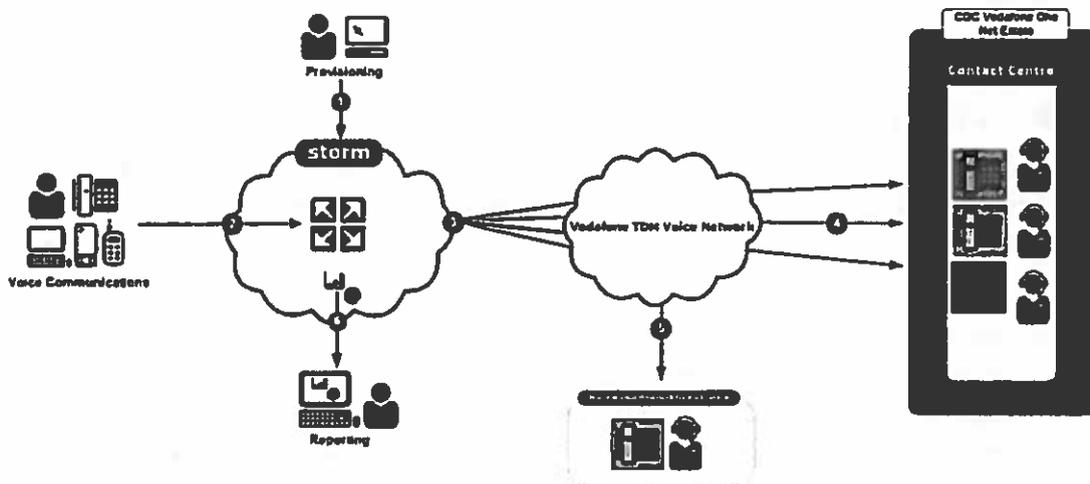
Figure 2: Contact Centre high level solution

There are three core elements required in order for the service to operate:

1. Data connectivity for the agents to access the storm service for their agent desktop application.

The Vodafone network will be utilised to deliver the storm data to the agent desktop application.

Access options include the Authority's WAN service or the Internet.

2. Voice connectivity to deliver the calls to the agent's soft client or IP handset.

It is assumed that the Authority will port all contact centre inbound numbers to Vodafone. Once this has taken place, all inbound calls will connect to storm before the VONE-C platform. Calls will be routed via the Vodafone Network to storm, the call will be treated through the storm IVR and the routing engine will determine the most suitable agent for the call to be delivered to. Once the selected the call will be routed by the PSTN network to a DDI (or hunt group) for the agent end point on the Vodafone One Net Enterprise Cloud platform.

All call charges have been included in the monthly agent fee.
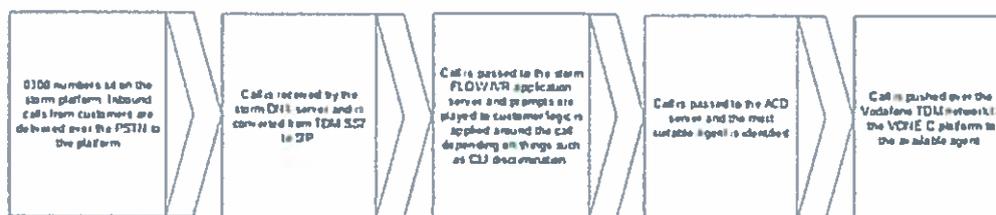
Figure 3: storm Call Flow

3. Core platform

The solution provides flexible demand forecasting over all front and back office operations in conjunction with the storm WFM: Teleopti™ application.

This is achieved through both the storm WFM: Teleopti™ application and the data produced by the storm VIEW reporting application. storm is capable of monitoring all inbound calls and associated agent status to-the-second. Using this data, accurate forecasting reports can be produced based on potential demand change.

Self Service and monitoring adherence for the Authority is via the following web based portals:

- — Desktop Task Assistant
- — My Time for Workforce Optimisation
- — Similarly detailed management information is provided via the following web based portals (described later in method statement):
- — VIEW Dashboard
- — WFM Dashboard

2.3 Desktop Task Assistant (DTA)

The agent interface for all storm services is provided by the Desktop Task Assistant (DTA). The DTA is a fully multi-channel interface, providing a holistic view of inbound and outbound communications across all channels. Through the DTA, agents are provided with tools to receive, manage and respond to text-based contacts such as SMS, email, IM and social media.

Performance-related agent statistics can be relayed to agents via the DTA in email format using the storm platform's VIEW reporting interface. From within VIEW, administrators are able to generate fully customizable reports based on a wide range of metrics, including statistics such as calls answered or average call duration by agent. These reports can be scheduled to be automatically generated at regular intervals or a specific time and distributed to specific individuals.

All agents, regardless of their location, are listed in the admin portal and appear as if belonging to a single contact centre organisation. From here, administrators are able to make any configuration changes or alterations to skills settings as necessary and roll them out instantly, irrespective of where the agent is based.

As part of the agent creation process, administrators are prompted to provide skill levels for each individual. Skill levels can be applied to agents across a wide range of criteria, from linguistic ability, to experience.

These skill levels are leveraged to drive the Intelligent Automated Contact Distribution (iACD) driven call flow which underpins services. All agents on the system are assigned to agent groups, which in turn are assigned to queues. In the settings for queues on the storm platform, administrators are able to configure matching rules which determine how each contact received in a queue is allocated to available agents.

For example, in the case of queues which captured contacts originating in France, administrators will wish to prioritise agents with high French speaking skills to field calls first, followed by any other relevant experience. Alternatively, for a complaints line, administrators may wish to prefer agents who have the most experience above all other criteria, as these individuals are likely to be the most adept at handling unhappy callers.
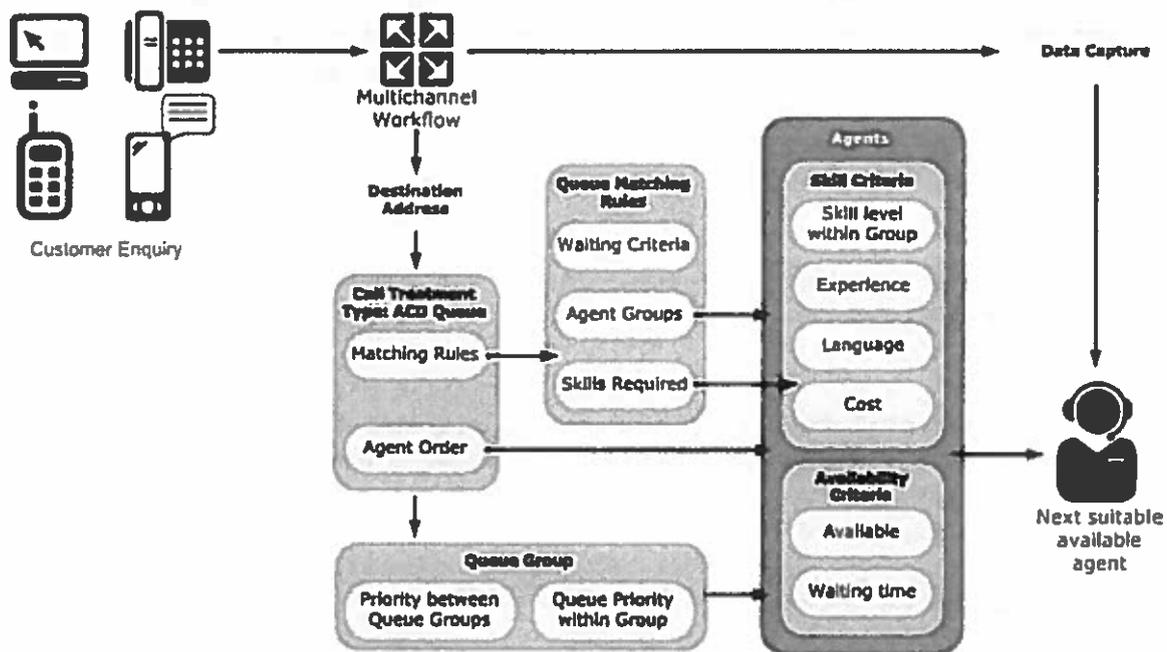
Figure 4: Contact Centre Automated Contact Distribution

Through establishing these criteria, storm administrators are able to dictate how call flow is directed through the system. Based on administrator choices, the storm system will automatically connect a caller to the best available agent who most appropriately fulfils all the criteria defined by the administrator.

2.4 Call Distribution

storm uses a multi-tenancy model that pools its computer resources in order to serve multiple customers, with different physical and virtual resources dynamically assigned and reassigned according to consumer demand. Working alongside this, storm's systems work off the DNX-100 technology which underlies the platform, whose enormous capacity means that the platform is capable of handling over 30,000 simultaneous interactions.

The Authority can take advantage of this huge capacity to configure as many agents as required. The flexibility which this system affords the Authority the agility to rapidly access the capacity needed to configure more agents at a moment's notice, via the Authority administrators.

Agent groups

storm's effectively unlimited capacity enables the Authority to create as many Agent Groups as they require. The platform employs a secure multi-tenanted architecture, meaning that all users leverage the same infrastructure, and all virtual resources are pooled. Continuous platform updates and improvements ensure that capacity is never reached, enabling users to continuously create new agent groups, as and when required, at a moment's notice.

Total number of skills supported by the system

storm contact centre systems will enable the Authority to configure an unlimited number of fully customizable skills against each agent on the system. There is no limit on the number of skills that can be supported by the system. Based on assigned skills criteria, the platform's intelligent Automated Contact Distribution functionality can make informed decisions on the best agent to pass individual interactions onto, helping to truly optimize allocation of contact centre resource.

Number of skills that can be assigned to an agent

storm contact centre systems will enable you to configure an unlimited number of fully customizable skills against each agent on the system. There is no limit on the number of skills that can be supported by the system. Based on assigned skills criteria, the platform's intelligent Automated Contact Distribution functionality can make informed decisions on the best agent to pass individual interactions onto, helping to truly optimize allocation of contact centre resource.

Queues

There is no limit to the number of queues which can be configured on storm, and the platform offers effectively unlimited capacity for the number of queues.

The storm platform boasts an effectively unlimited capacity, employing a secure multi-tenanted architecture in which all virtual resources are pooled and shared by all users. This mass-scale infrastructure is capable of supporting up over 30,000 simultaneous interactions, helping to ensure that the Authority is able to connect and queue their callers, even during peak periods.

An unlimited number of queues can be created and configured on the system and assigned to agents at a moment's notice, via the platform's administrator interface.

How many routing variables can be used, and can they be used in different time intervals?

An unlimited number of routing schemes, 'call treatments', can be applied to contact centre services via the storm administrator interface. Simple call treatments can be applied from within the CONTACT administrator interface. All call treatments can be adapted easily based on a comprehensive range of time-of-day, and holiday-based routing options.

Available call treatments include:

- — Hunt Group
- — Switchboard
- — Supervised Group
- — ACD Queue
- — Pickup Group
- — IVR
- — Paging Group

    —   Call-back Queue

For more sophisticated requirements, you can configure as many fully customised routing variables as they please using the storm FLOW service management application. FLOW enables you to access a variety of advanced options, such as the ability to use different routing variables depending on IVR selections, the number of interactions the contact has already had with the organization, and many more.

The flexibility of storm's cloud-based model allows you to rapidly adjust your routing variables, and put them into action in real time. In addition, the FLOW service allows you to rapidly revert to older configurations of their routing variables, enabling them to swiftly restore previous settings should a fault develop with a new call treatment.

Multi-level, multi-channel editable IVR is configured through storm FLOW storm FLOW is a workflow management tool that is used to design and build powerful, complex multimedia services for mobile and fixed networks.

Using its secure and intuitive drag-and-drop web interface, the FLOW workflow management tool can be used to:

- Design, test and implement customised, integrated communications solutions that link up your business
- Add intelligence to your automated systems
- Integrate your services with third-party networks and databases that have been certified as compatible with storm services
- Provide device-to-device messaging
- Create inbound and outbound campaigns using multi-channel, multi- media technologies in innovative ways.

FLOW forms part of storm's communications integration architecture, comprising INTEGRATE for customised third-party database and systems integration, and VIEW for real-time and historical management information and service monitoring.

FLOW functions in combination with these modules, allowing you to create full-featured multi-channel services that respond automatically to triggers and alerts issued from any service or source of data.

FLOW System Architecture

Running in the cloud, FLOW harnesses the integrated communications architecture of storm, Europe's largest mass interactive multi-channel, multimedia platform. storm supports over 100 digital and analogue communications protocols, allowing you to manage your workflow dynamically across any channel.

Services built using FLOW allow a rich array of multimedia sources to be supported and their use tracked in real time. These include:

- Instant messaging (IM)
- Short messaging service (SMS)
- Multimedia messaging service (MMS)
- Email
- Dynamic web services
- Screen recording
- Video services (including HD video) using H.263 and H.264
- Video to mobile
- Voice over IP (VoIP)
- Time division multiplexing (TDM)
- Voice conferencing

- Automated voice processing services including text-to-speech and automatic speech recognition.
- Support for multimedia formats is continually being extended and refined.

Integration with storm

- FLOW integrates with a range of storm products, including:
    - RESPONSE and Service Portal™ for service creation, media management and service 'provisioning'
    - PBX and CONTACT for cloud-based IP voice services and automatic call distribution (ACD) contact centre management
    - LOCK and PADLOCK to allow secure automated payment systems to be linked to your interactive workflow
    - OUTBOUND to create and run mass outbound campaigns using power dialling
    - RECORDER whose voice and screen recording capabilities mean that staff performance can be monitored and reviewed, and help ensure that your company meets all Payment Card Industry (PCI) and Financial Conduct Authority (FCA), regulatory requirements
    - VIEW to allow you to monitor all statistics related to your FLOW services, issue alerts and generate customised reports that can be viewed using the VIEW Dashboard, or distributed automatically via email or FTP
    - LOSS to support alerts and intelligent workflow management.

Building a FLOW Service

FLOW is accessed through a web browser, allowing you to log in to work on your services from any location with an internet connection. FLOW launches in an intuitive Flash-based GUI that allows you to build up a service workflow, using 'action cells' to represent the actions the service will perform when run, and links between actions cells to indicate the work flow.

Action cells and links are arranged using drag- and-drop technology into easy-to-understand visual representations of the service you are building.

As you build your service, the workflow is represented on screen in the form of a flowchart running from left to right, allowing you to trace your service logic visually and intuitively and make changes as required. The workspace can be zoomed and panned using a mouse or with graphical slider bars, allowing you to view your service in fine detail or to zoom out for an overview.
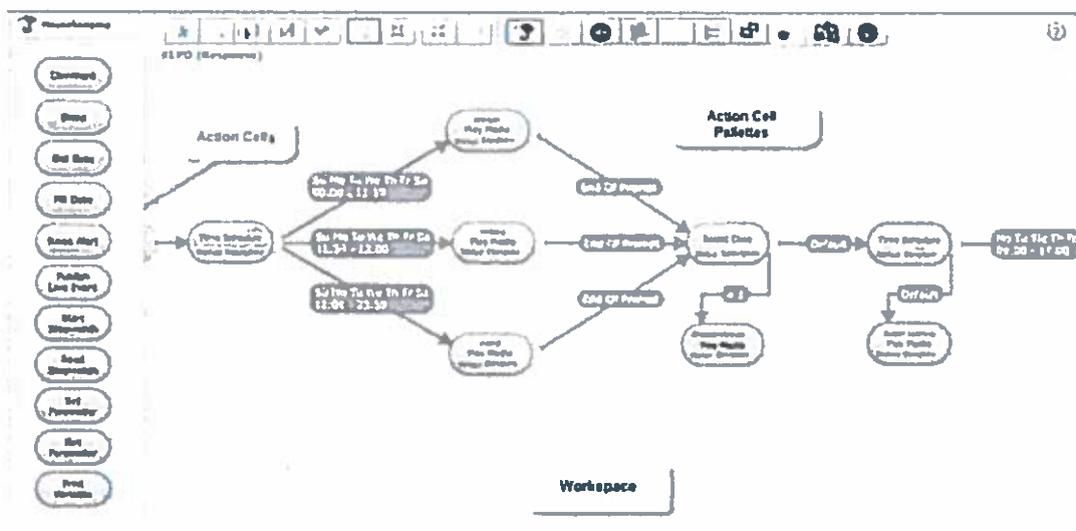
Figure 5: The FLOW Workspace

When building a service using FLOW, you work in an environment that consists of a workspace in the centre of the screen, with control buttons along the top and 'palettes' of action cells and variables at the left.

The FLOW workspace is the canvas used to create your services. Services are built step by step, by dragging and dropping elements such as action cells and variables. Action cells are placed onto your workspace and connected together by links in order to create a sequence of actions that execute one after the other.

Some action cells can be linked to more than one follow-on action cell, letting you build a workflow that takes different routes, according to user actions or situations the service encounters when it is run.

So, for example, you can have an action cell telling the system how to handle a call that is linked to two different action cells - one routing the system to an agent, the other routing the call to an out-of-hours message, depending on the time of day.

Variables are defined and dragged into action cells as you use the FLOW workspace to define your service. These are used when the service is run to store, process, and transmit data between storm services or between storm and external systems

iPath® and DTA®

FLOW can be integrated directly with an agent's desktop using the iPath Desktop Transformation Assistant (DTA), software modules that provide connectivity to a variety of communications channels and CRM databases.

Communications from any end-user device can be presented to your workforce through a unified interface, allowing agents to respond to voice, IM, email or SMS messages via a single screen. Data gathered from customers or retrieved from remote databases can appear directly on an agent's display as a screen.

Used in combination with FLOW's web services and INTEGRATE capabilities, the iPath and DTA can display information retrieved from a third- party CRM system, or data passed to or from an automated payment system such as LOCK, alongside session data

As soon as a data stream hits the iPath, the DTA module pops up to display relevant data.

storm can also combine internal intelligence (granular tracking of dialled numbers, for example), with complex integration between storm services and third-party databases / Customer Relationship Management (CRM) systems to support completely customizable caller routing.

This means that a storm service can be configured that performs an ANI lookup when a caller dials in. Through integration, storm services match the caller's number to records in a CRM database, and then feeds information such as caller name or interaction history back through into the service. Based on this information, the caller can then be routed on to a relevant agent or service; if the caller is identified as a priority customer, he or she can be automatically routed to an executive line, and the agent tasked with handling the call can be automatically supplied with all relevant data, including name, for a more personalized experience.

If a customer dials a particular number, such as a geographic rather than a non-geographic number, this can also be taken into account by storm, either by matching the caller to an agent with local expertise in the region of the geographic number dialled, by routing the caller on to an IVR menu with relevant local options, or by feeding the call into another service (such as an automated donation line that targets a local charity and cuts out the requirement for the caller to manually identify which charity he or she would like to donate to, increasing efficiency).

Any storm service is capable of taking into account multiple factors, with intelligent algorithms able to determine optimal routing from multiple factors (for example, calculating priority based on a combination of IVR choices, number dialled, and recent interaction history). All intelligence is completely configurable through storm's advanced multi-channel Service Creation Environment (SCE), FLOW, and also through its cloud contact centre administration portal.

2.5 Call back Management

storm provides intelligent call back solutions through its TACTIC proposition. With TACTIC, clients are able to provide queued callers with the ability to hang up the phone and receive a call back at a time of their convenience.

Initially, administrators configure priority levels for various caller categories and allocate different routing rules for customers based on the subject matter of their enquiry. During busy periods, when callers are placed in a queue they are provided with the option to request a call back. Callers may even book and specify a time for the call back via IVR, thereby ensuring an agent is kept available for the customer's call. Reminders are then distributed via SMS and provide the customer with the option to text back when free to receive a call.

In addition to being able to book a call back from a queue, customers can also be enabled to book call back from the web or WAP-enabled devices.

Regardless of how the customer books the call back, TACTIC provides the responding agent with relevant personal information and interaction history via whisper prompt, enabling them to effectively handle the customer enquiry. If required, TACTIC can also be integrated with CRM systems and databases, enabling the system to retrieve additional relevant information which can be relayed to the agent undertaking the call back.

2.6 Call Recording

storm RECORDER is a flexible, cloud-based voice recording package delivering always-on or on-demand call recording with integrated call archiving and assessment capabilities. Recordings are stored on resilient, parallel servers in multiple, physically separate and secure locations and can be archived for as long as required.

These dedicated servers offer massive cloud-based storage capacity, removing the need for investment in on-site call recording facilities. storm offers a mass capacity, network strength, resilient recording and archiving infrastructure with unparalleled availability and data security.

Backed by accredited ISO27001 information security and ISO9001 quality management systems, storm RECORDER, when used in conjunction with LOCK, meets all industry regulatory requirements including those of the Financial Conduct Authority (FCA), Payment Card Industry Data Security Standard (PCI-DSS), and OFCOM. storm's secure, web-based platform offers instant call retrieval through an intuitive point and click interface.

Recordings are stored on storm's servers for as long as you require, and you can search and retrieve them as necessary. They can be streamed, downloaded or exported by email or file transfer protocol (FTP). Export plans can be created to copy recordings to your own servers automatically; and recordings can be purged on a regular basis according to their age.

For industries where call recording is a requirement, recordings are stored as uncompressed pulse code modulation (PCM) WAV format in accordance with regulations.

RECORDER also features integrated number management services allowing you to route your geographic or non-geographic access numbers through storm's highly resilient, mass capacity voice over IP (VoIP) platform.

RECORDER can be used as a stand-alone recording solution for circuit-switched, packet-switched or wireless network calls, or can be fully integrated with your existing IP telephony infrastructure.
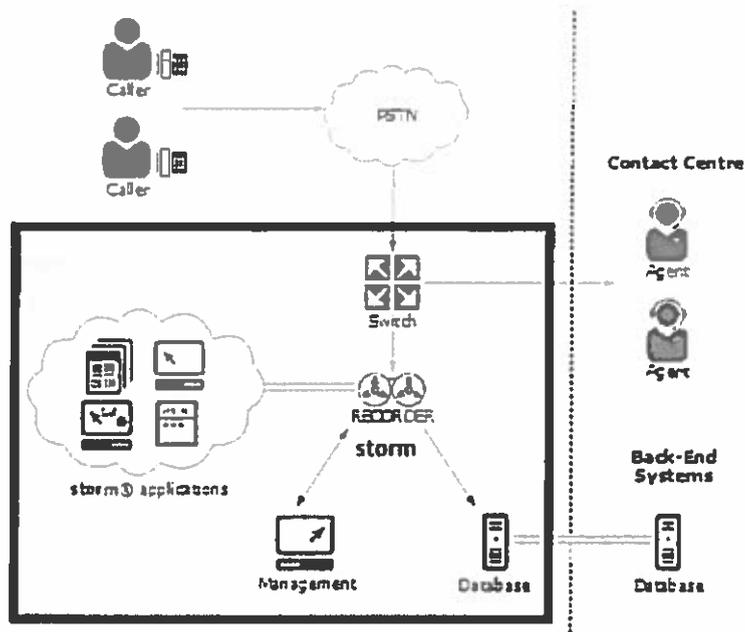
Figure 6: Call recording high level solution

As all calls traverse the storm platform, all calls are recorded at point of initiation. This applies automatically for inbound calls, and outbound calls. As described earlier, Outbound calls are where the storm platform onwards routes the caller to an agent via PSTN to the Vodafone One Net Enterprise Cloud IPT telephony platform.
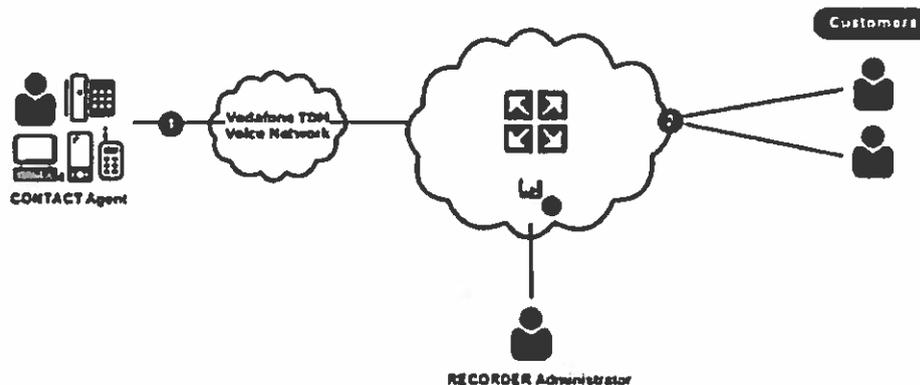
Figure 7: Call recording of all calls

In addition to meeting regulatory requirements, call recording makes business sense. Making the right impression can mean the difference between acquiring a customer for life and losing a vital business opportunity. Regularly reviewing recorded calls can give you a better understanding of how your front-line staff is performing, and how your company comes across to customers. You can carry out this review process yourself; or you can engage the services of specialist service providers who employ industry experts to carry out call critiquing, thus saving you management time.

Call recording also helps to ensure that your staff, your customers and your business are always protected in case of dispute. RECORDER features integrated tools for reviewing and analysing call recordings, allowing you to:

- Rate calls through the web interface
- Share example recordings across your business for training or review purposes
- Store notes and comments against individual calls.

Exemplary or poor performance can be flagged up, allowing your managers to have full visibility of the service your company is providing.

Multichannel Queuing

RECORDER (working in conjunction with PBX and CONTACT) stores a history of email, web chat and SMS conversations as well as voice calls, which agents can access using the PBX Personal Portal interface.

My Conversations: Inbox

Figure 8: Call Recording Multichannel Queuing

Setting up Call Recording

RECORDER is accessed via a secure and intuitive point-and-click web GUI. This interface is simple to use, and is organised into four sections:

- Recordings: used to manage, review, search and export your call recordings
- Settings: used to change administrative options for the system
- Organisation: used to configure organisation-wide settings such as data exports and to manage sub-organisations and departments
- Reports: used to access the audit log and operator report.

The GUI allows recordings to be archived, organised, searched or exported, and the system can be accessed from any computer with a network connection.

Using FLOW, you can configure your services so that a prompt is played to inform contacts calling or being called that the conversation is being recorded.

At Run-time

As calls occur an entry for the call recording is made in the inbox of the organisation that owns that number.

RECORDER stores a .WAV recording of the call, and creates a related database entry that holds the following information:

- The name of the related .WAV file
- The organisation and department
- The start and end times and date of the call
- The 'from' number, the access number and the number dialled
- The duration of the recording
- The media source
- The overall rating assigned to the call
- Any notes entered against the call
- Each of the scoring questions set up for the organisation or department, together with the score and any comments entered against each.

The RECORDER interface allows you to list recordings in your organisation's inbox.

Figure 9: Call Recording Database

You can list:

- Recordings made today
- Recordings made yesterday
- All recordings in the inbox (in other words, recordings that have not yet been deleted or moved to an archive folder)
- All recordings in your organisation's folder system
- Recordings that meet search criteria.

If you want to listen to a recording, you can select it and then stream it via Windows Media Player (or a similar software tool) or download it as a .WAV file.

When necessary, an operator can switch call recording on and off, as required.

- If your system uses iPath softphones, a REC button on the desktop interface allows call recording to be started and stopped
- If your system uses hardware phones, on-demand call recording can be started and stopped from any by using a DTMF key sequence such as '*30'.

Once you have listened to a call recording, the RECORDER interface allows you to:

- Edit the call recording details, if necessary providing a meaningful subject title for the recording to replace the one generated by the system
- Add notes against the recording
- Enter an overall effort rating

— Enter rates and comments against each of the scoring questions set up for your organisation to use in rating its operators' performance.

Figure 10: Call Recording Editing Entries

This window allows you to generate and print a printer-friendly version of the call details.

When you review a recording, you can rate each aspect of the call, setting a score and making notes against each scoring question.

Figure 11: Call Recording Scoring

You can also give the call an overall rating and make detailed notes. These details are stored against the call recording and can be reviewed by bringing up the call details screen. You can search calls using these scoring criteria as your filter. Exported or downloaded call recording ZIP files will contain a spreadsheet or CSV file listing (among other information about the call) the detailed scoring profile for each exported or downloaded call.

Managing Call Recordings

As call recordings are made they are placed in your organisation's inbox, within seconds of the call ending. Each recording is assigned to a specific organisation and, if relevant, department. This allows you to categorise all recordings across the business according to the branch or department making or receiving the recorded call.

Recordings distributed via email or FTP can be compressed into ZIP file archives. Each distributed ZIP file can contain an Excel spreadsheet or CSV file containing full details for each recording transferred as part of the export. A maximum size can be set for files sent as email attachments.

RECORDER allows you to set up any number of folders to archive your records, and provides facilities to allow you to move them from the inbox into the appropriate folder.

Figure 12: Call Recording Folders

Call recordings can be deleted manually, and RECORDER can be configured so that your call recordings for an organisation (or department within it) are purged automatically after a pre-defined number of days. There are no limits to the amount of call recordings which can be stored. However the cost to the Authority will increase, as storage capacity increases.

Global folders can be created that allow you to share call recordings with other users. A 'Trash' folder ensures that any deleted recordings will remain on the system for a configurable period of time and can be restored if required.

Recordings can be downloaded to your local system or exported to an FTP server or email distribution list directly from your inbox or folders. This can be done manually, for any many or as few recordings as required.

Automated export plans can be configured to ship recordings to your secure FTP server on a regular basis.

Recordings are exported in a compressed ZIP file, along with an Excel spreadsheet or CSV file containing full details for each call.

Figure 13: Call Recording Export

Advanced search options mean that you can quickly locate any recordings held on the system. Searches can be performed based on any of the information held against the call record, including:

- The originating, destination and access numbers involved
- The date and time of the recording

- The organisation or department to which the recording belongs
- The score profile or overall rating assigned to the recording
- The type of call ('dial through' or 'fixed routing')
- The content of the notes field.

Multiple filters can be added to your searches, and displayed recordings can be narrowed by date and time, ensuring you can always find the recording you need within seconds.

Enhanced RECORDER Features

In addition to the basic functionality our RECORDER solution also offers the following enhanced features:

- The ability to control call recording at number level
- The ability to configure RECORDER settings for each organisation and sub-organisation
- The ability to generate email and SMS notifications for missed calls and for mass distribution
- Campaign performance analysis features.

Using RECORDER's enhanced functionality, call recording can be controlled by options configured at 'access number' level.

Access numbers are the numbers used by your organisation for incoming and outbound campaign calls.

All of your organisation's access numbers can be routed through RECORDER, enabling its voice recording functions, integrated media campaign reporting, contact list management and SMS broadcast functions. These value-added features can be deployed without making changes to your existing infrastructure.

RECORDER allows you to configure your geographic and non-geographic numbers to be either:

- Dial through, or
- Fixed routing.

A dial-through service allows you to use the system as an outbound call routing platform, ideal for distributed or home workers or for when call recording is required on occasion. Your agents dial in to the RECORDER system and are prompted to enter the outbound destination number they wish to dial.

You can select a calling line identity (CLI) number to present for outbound calls from your organisation, allowing a distributed workforce to appear as if they are located in your main office. When the call is complete, agents can press a digit to initiate a further call without disconnecting from the platform.

A fixed routing service can be used to route your company's business numbers to any onward destination through storm. Your existing numbers can even be ported to storm so that you don't have to change your business phone numbers. The system can be used to change the routing configuration for your numbers with a few mouse clicks.

As each access number is defined in RECORDER you can specify whether:

- Calls (inbound and outbound) are always to be recorded for that number
- Calls for that number are to be recorded only when the operator feels they need to be. You can specify the dual tone multi-frequency (DTMF) key sequences to be used to start and stop recording.

Organisation: **Access Numbers**

Figure 14: Call Recording by Access Number

When setting up access numbers you can also define, among other things:

- — Whether an email or SMS message (or both) are to be generated following a missed call involving the number
- — Whether an email or SMS message (or both) are to be generated if a call involving the number results in an appointment
- — Whether recordings of calls involving this number can be forwarded using email or FTP (or both).

Using RECORDER's enhanced functionality, call recording can be controlled by options configured at organisation level.

RECORDER allows you to manage multiple organisations and sub-organisations in order to provide call recording services to multiple sites. For example, if your business has multiple franchises, each branch can be configured as its own sub-organisation. A top-level administrator can provide services to each sub-organisation, and decide which features are available to users lower down the hierarchy. Each function of RECORDER is controlled by user rights, allowing system administrators to control which users can access which parts of the interface. Scoring questions, for instance, can be set by the top-level administrator for the entire organisation, or you can give each sub-organisation the ability to edit and create its own scoring profiles.

Organisations can be further divided into departments, allowing you to group call recordings according to the department handling the call. When reviewed, recordings can be assigned to the relevant department so that a search can return a list of recordings specific to a department within an organisation. Each department can have its own set of scoring criteria in order to rate the performance of agents in line with criteria specific to each section of the business.

The Audit Log and Operator Report pages present logs detailing every login and action performed on the system, giving administrators the ability to trace all changes made by your users.

At organisational level you can define how the recordings made for calls are to be handled.

Figure 15: Call Recording Handling setup

You can define options for:

— Streaming recordings
— Downloading recordings
— Purging recordings.

Scoring questions are also defined at organisational level.

Figure 16: Call Recording Scoring Questions

Scoring questions allow you to analyse and monitor the performance of your staff by scoring each recording against a set of pre-defined questions. This feature is particularly useful when assessing the performance of sales team agents. A full set, unlimited in number, of detailed scoring questions can be created for your organisation (or for each department within it).

For monitoring purposes, supervisors are provided with additional tools via the VIEW reporting application. From this interface, supervisors may monitor individual agent interactions for quality control or training purposes via Listen-In features. If intervention is required, the system allows supervisors to offer live advice and support to agents via whisper prompt. When using this feature, supervisors are able to speak to the agent whilst they are live on the call, without the caller being aware. For situations requiring immediate intervention, Barge-In features enable supervisors to take control of a call and speak to the customer directly.

Additional road mapped features for the storm platform will introduce screen recording capabilities, enabling supervisors to monitor all desktop based agent activity, in addition to providing greater visibility over text-based contacts.

As all calls are passed through the storm platform (as inbound numbers will be ported to the service) we can ensure that all calls passed to third party equipment (i.e. VONE-C) are recorded.

2.7 Email Distribution

The storm platform enables fully blended queuing of inbound and outbound contacts across all channels, including voice, email, web chat and SMS. All interactions, text-based or otherwise, are managed via the storm Desktop Task Assistant (DTA). Email is routed on the system using the same logic as voice and other channels. Administrator users develop skills criteria and apply different scores to individual agents according to their ability and experience across different areas.

Based on these skills-based criteria, users may then assign matching rules which prioritise particular skills or experience levels according to the requirements of the service. These rules are then interpreted by the platform's Intelligent Automated Contact Distribution (IACD) features to route the contact to the most suitable available agent. All contacts are routed to, and managed within, the DTA user interface, enabling blended management of all channels using a single environment.

Message priority rules are set by supervisors, who can choose to assign message priority on the basis of any property of the email. Most users, for example, choose to assign message priority on the basis of wait time, customer value, or the subject of the email, but there is no practical limit on the rules which define message priority. Once in the queue, the priority of an email can only be changed automatically, meaning that supervisors need to set rules that escalate the priority of an email in order to raise their priority

All traffic passing through the platform, regardless of the channel on which it was received, can be reported on using storm's real-time and historical reporting dashboard, VIEW. From VIEW, administrators are able to create fully customized reports, drawing from an expansive list of system metrics and display options.

Email integration is achieved through IMAP dips. As part of the project management phase, the Authority will be expected to provide Vodafone with an exchange (or other email system) open IMAP box (along with firewall clearance). storm intelligently monitors this box for any incoming mail, and transfers mail through a secure connection to the FLOW tool for discrimination.

The storm platform is capable of keeping all interactions held through storm archived, and of integrating with third party databases and systems that enable them to provide data on external communications. As a result, emails can be archived and searched on the basis of any feature within them, as well as marked up to be followed up.

In order to preserve the privacy of those involved in the responses, moreover, supervisors are able to define user rights in order to rule that, for example, agents can only interact with their own messages, while supervisors can only interact with the messages of those they are directly in charge of.

The ability to append emails to customer records within CRM systems is not provided as a standard feature. In instances where this feature is a key customer requirement however, this functionality can be provided on application.

All emails processed on the storm platform are handled according to the highest standards of security. Infrastructure used for handling email is hosted in Telco Grade secure data centres, and administered by an ISO 27001 accredited organisation.

Access to emails through storm is restricted to the agent Desktop Task Assistant (DTA) interface. Access to the DTA interface can only be achieved via dual authenticated login using a personal 4-digit PIN and an RSA keyfob, helping to protect sensitive emails against unauthorized access.

2.8 Social Media

Social media is subject to the same routing logic as all other text-based channels on the storm platform, and is distributed in a mixed fashion in blended queues alongside SMS and email contacts. Direct messages received on social media channels, such as Facebook or Twitter, are routed to agents and handled via the platform's DTA interface. Agents are then able to respond to these messages from within the DTA interface.

Routing of social media messages, like SMS and email, is powered by the storm platform's iACD functionality. System administrators assign skills ratings to each individual agent across a range of fully customizable criteria, such as agent experience and language ability. Administrators then also define matching rules on a queue by queue basis, which prioritises different skills criteria in order to define which agents are best qualified to handle each different type of contact.

Based on these user inputs, specified via the CONTACT administrator interface, the storm platform's iACD features distribute social media contacts to the most appropriately skilled available agent based on the matching rules for the queue in question.

Reporting on social media traffic is possible using the reporting features of the storm VIEW application. VIEW provides licensed users with access to a fully customizable reporting interface, from which administrators are able to create real-time and historical dashboards on a wide range of system metrics. Statistics which can be interrogated in order to generate reports include total contacts received and total response rates. Statistics can be displayed in a wide variety of formats, including pie charts, bar charts and gauges. Upcoming platform developments will also provide users with the option to generate reports in 'word cloud' format, enabling improved reporting on keyword usage.

2.9 Web Chat

Web chat is routed on the system using the same logic as voice and other channels. Administrator users develop skills criteria and apply different scores to individual agents according to their ability and experience across different areas.

Based on these skills-based criteria, users may then assign matching rules which prioritise particular skills or experience levels according to the requirements of the service. These rules are then interpreted by the platform's intelligent Automated Contact Distribution (iACD) features to route the contact to the most suitable available agent. All contacts are routed to, and managed within, the DTA user interface, enabling blended management of all channels using a single environment.

Web chats are either initiated by agents, or by customers. In either case, storm is able to intelligently process information about the pages which the customer has recently been browsing in order to give agents an idea of what the dominant themes of the interaction are likely to be. storm is able to use this information in order to assign chats to agents or queues. So, for example, if a customer has recently been searching the website for products, they can either receive a pop-up chat from a sales consultant or be passed through to one if they initiate a conversation. If the customer has been searching for user guides, meanwhile, they can be passed through to more technical staff.

The platform can also offer more direct ways of discovering the needs of the customer in order to direct them towards the most appropriate agent. storm can automatically send a pop-up chat asking what the customer wishes to speak about to customers who have either initiated an interaction with the organization, or spent a length of time on the website as defined by supervisors. Using keyword recognition, storm can then intelligently

direct the enquiry to an appropriately skilled agent, saving time from being wasted directing interactions to relevant agents. This can either be presented as an auto-populated message which appears to be from an agent, or as a brief form, depending on the needs of the storm user.

storm can also help organisations that wish their clients to build up relationships with specific agents. storm can ensure this by recognizing the customer through unique reference codes, user names, or even IP addresses, and directing them to agents they have bonded with in the past.

All traffic passing through the platform, regardless of the channel on which it was received, can be reported on using storm's real-time and historical reporting dashboard, VIEW. From VIEW, administrators are able to create fully customized reports, drawing from an expansive list of system metrics and display options.

2.10 Quality & Satisfaction monitoring

Quality & Satisfaction monitoring is supported through the storm ASK module. The ASK module hasn't been included in our solution; however the Authority can choose to add it at any time, at any additional cost.

storm ASK lets you receive, monitor and analyse input from your customers in real-time. This means you can use storm for all your surveying requirements.

storm requests, collates and interprets sets of the data for you. This reduces the cost of gathering regular customer feedback and enables you to ask people for their views more often, and in more detail. This helps you to adapt to the market to stay ahead of the curve rather than chasing the latest trend. ASK allows you to build lasting relationships with your customers, improving your service and saving you money simultaneously.

The Customer calls the Authority contact centre. The Customer is then asked whether they wish to participate in a survey after speaking with an agent. The Authority will have access to manage the storm FLOW service builder to configure the SMS and voice service flows and the storm VIEW portal for real-time and historical analysis.

Figure 17: FLOW Service Builder

Due to the nature of the storm cloud environment, we can achieve three modes of supervisor listening. 'Whisper', 'Barge' and 'Stealth'. Whisper allows the supervisor to talk to the agent without the customer hearing, Barge allows the supervisor to barge into the call and stealth allows the supervisor to listen to the call without anyone knowing.

Please also refer to the Call Recording section 2.6 for details on how call recordings can be monitored and scored for training and development purposes.

2.11 Work Force Optimisation

Storm WFM: Teleopti consists of a base product and optional, add-on modules/packages that are easily adaptable and expandable.

Figure 18: storm WFM: Teleopti WFM Solution

The table below shows the Modules included within our solution.

Modules	Description
CTI Connectors	Provides officially certified connectors to all major CTI providers for automated transfer of contact data.
Multichannel Forecasts	Multi-skill, multichannel forecasting for both short- and long-term planning, as well as for trends and seasonality analyses.
Multiskill Scheduling	Powerful, multi-skill, scheduling-optimization engine for effective agent planning, taking into account work-hour legislation, demand, employee requests – and more.
People	Agent administration, including work-hour contracts and skill assignments.
Intraday Management	For up-to-date reporting, as well as schedule editing with drag-and-drop ease – in real time.
Standard Reports	The reporting package, made up of 26 standard reports, covers forecasting, scheduling accuracy and agent performance.
Budgeting	For long-term planning of staff requirements.
MyTime – for Agents	The web-based agent portal provides agents not only access to their schedules but also industry-leading empowerment tools for work hour preferences and self-assessment.
Software Development Kit (SDK)	Designed with openness in mind, the powerful SDK platform for customised development and integration is based on industry-standard web services.
Vacation Planner	Agents book holidays autonomously via the agent portal and receive manual or automated approvals, based on pre-defined business rules
Shift Trader	Agents can trade shifts – with or without team leader/administrator intervention – while maintaining staffing-level requirements.

| Overtime Availability | Agents simply enter their overtime availability on their MyTime agent portal, which creates a supplementary resource pool that's ready for automated scheduling when needed. |
| Real-Time Adherence (RTA) | Real-Time Adherence monitors agent status, giving overviews – in real time. The information, visible in the intraday module alongside schedules and incoming demand data, makes tracking agent-adherence and adjusting schedules effortless, with drag-and-drop ease maintaining service-level targets throughout the day. |

Table 7: storm WFM: Teleopti Modules

Scheduling Management

storm WFM: Teleopti allows users very easily to amend schedules for any durations, including editing shifts in real time, reforecasting and then re-optimizing in the middle of the day, and manage live agent adherence through the RTA tool that compares actual activities scheduled with the actual states the agents are working on. Once any updates are made they are automatically visible to the users,

Figure 19: WFO – Scheduling Management

Demand Profile and Forecasting

storm WFM: Teleopti allows users to work with an endless number of scenarios as needed. –Those scenarios can be used as a part of the system that allows user to experiment with different possibilities and predict different outcomes for staffing depending parameters being experimented with like volumes or staffing. The most suitable one will be selected for scheduling
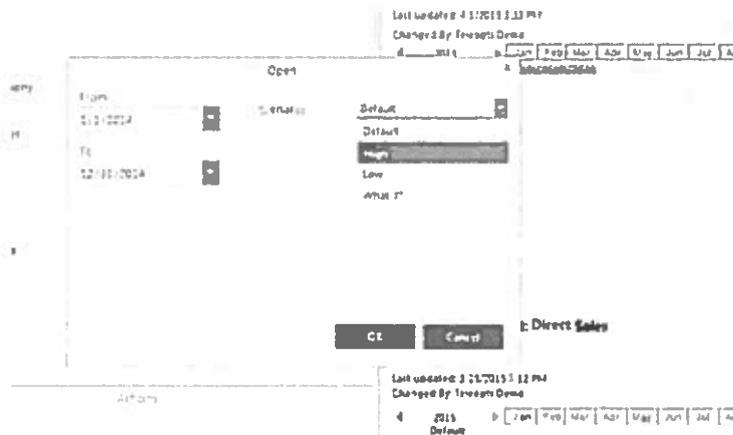
Figure 20: WFO – Demand Forecasting

It is very easy in storm WFM: Teleopti to configure any number of business rules, with extreme, and then create schedules using those rule. It is equally easy to also reconfigure those rules, and also override those rules when needed.

Self Service

storm WFM: Teleopti self-service and notification packages allow for agent to be able to access their schedule through the "Mytime" interface which is web-based either though intranet, internet, mobile smart phones or tables. Agents are able to also communicate through requests in this interface, or the more advances feature of agent scheduling messenger. They can also apply for leaves and for swaps through this interface or through their mobile devices quite easily. Manual adjustment to the schedules though mobile devices and real time management through mobile devices is also available through the "MyTeam" interface as well.
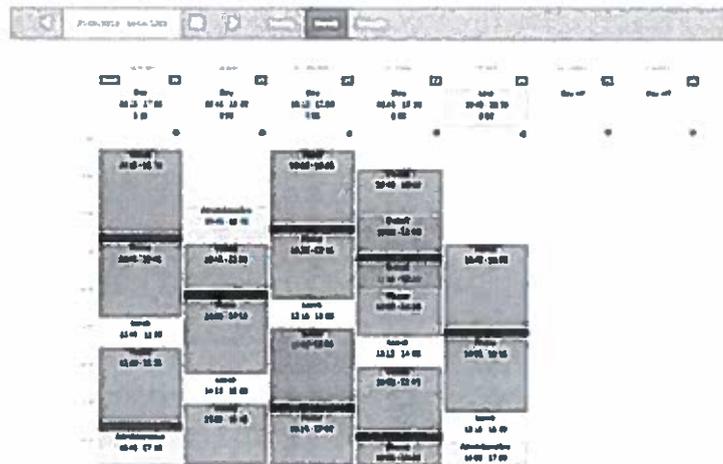
Figure 21: WFO – Self Service Interface

My Team offers the user a top down view of whether agents are adhering to schedules. The user has the ability to drill into groups / teams / individual agents to identify agents that are not adhering. There is also the ability to directly message agents as a group. storm WFM: Teleopti My-Team interface allows for supervisors and managers to check agent adherence from any location, and as this is integrated directly into the storm platform the Authority will enjoy end to end real time accurate views of their contact centre estate.

2.12 Management Information

storm VIEW is a powerful management information reporting package that provides access to a range of sophisticated statistical analysis tools. The VIEW Dashboard is a flexible and fully customisable real-time reporting interface that can be integrated with any source of service data. VIEW can be used to display management information from multiple services side by side on a single screen, and can be adapted to meet the needs of any service.

Figure 22: Comprehensive Management modules

The historical VIEW Report Builder interface allows users to create a set of customised data analysis reports that track service performance over time, while Dashboard's real time statistics are updated to the second, enabling users to monitor and respond to events as they happen. Reports can be saved and distributed automatically.
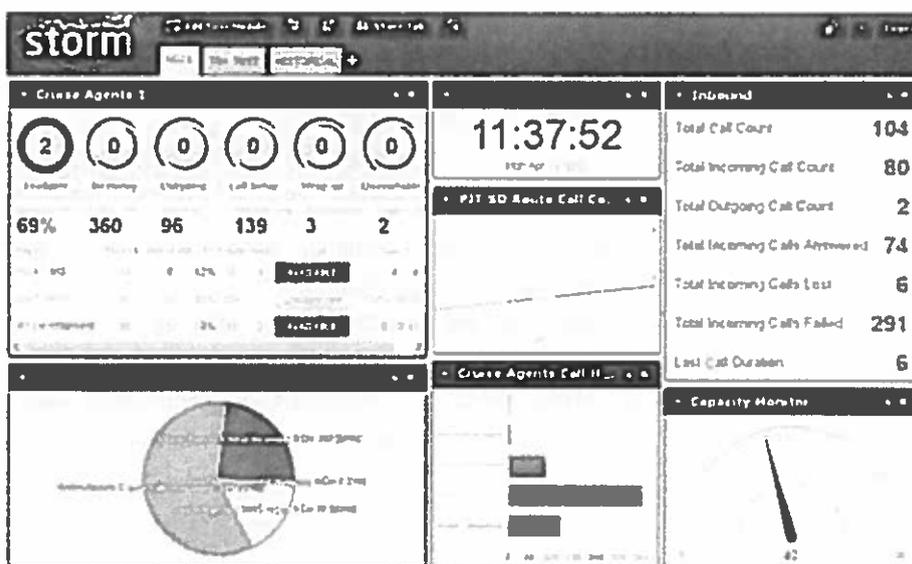
Figure 23: Management dashboard

Key Features

- Intuitive, secure, drag-and-drop interface: flexible, fully customisable reports can be tailored to the user's needs and accessed from any location

- Real-time and historical reporting capability: switch between a live view and historical report screen with a click
- Real-time reports are accurate to the second; historical reports can be generated instantly for any time period
- Share reports across an organisation or with specific users; lock reporting tabs or provide users with editable templates
- Export data or graphical displays for reports and presentations
- Automatically distribute reports by email or SFTP (Secure File Transfer Protocol)
- Multi-channel integration: trigger warnings and notification alerts via SMS, MMS, automated voice services and email

Communications Integration

VIEW is integrated by default with all storm services such as RESPONSE and FLOW for intuitive interactive service creation, PBX and CONTACT for intelligent call distribution and contact centre management, and DIAL for outbound multi-channel services, allowing users to view real-time and historical data for any service. Its communications integration and real-time feedback capabilities enable users to gather all available customer and agent information, from skill levels and preferences to personality traits, facilitating the delivery of Mediated Interaction Matching (MIM), which transforms the quality of customer-agent communications.

VIEW can be integrated with any existing network infrastructure, database or CRM system, performing custom look-ups on the data network. Using an INTEGRATE API (Application Programming Interface), the system can work within the existing network infrastructure, allowing users to pull in data from any source and push alerts via any channel to keep their front line managers in the know via SMS, voice, email and the web.

storm permits users to define trigger conditions against live events, and the action to be taken when a trigger condition is met. Actions can include, for example:

- Switching to a different call routing plan
- Sending out alerts or warnings via SMS or email, as appropriate
- Displaying a warning message in any Dashboard reporting screens that are monitoring the live event on which the trigger condition is set
- Executing a pre-defined FLOW script.

For example, if the number of available hospital beds reaches a minimum (as defined using a trigger condition) the storm service can be configured to send an SMS alert automatically to front-line managers. If a contact centre is experiencing an unexpectedly high volume of calls (as measured against a trigger condition set up on a call count metric) and callers to the helpline are likely to face a long wait before speaking to an agent, the call routing plan can be adapted to take account of the situation. In such a situation, a warning message can be displayed on the Dashboard real-time reporting screens to ensure that the problem becomes instantly visible and is dealt with as soon as possible.

There are 26 standards reports in storm WFM: Teleopti that cover everything from Forecast and schedule analysis, schedule adherence, attendance. All those reports are regulated by permissions as to who can see which reports.

storm WFM: Teleopti also has the optional performance manager module which allows for customization of different data coming from the storm WFM: Teleopti database and creating analysis for this data, and the ability to drill down in this data, and dice and slice in it. Also there are 6 extra fields that storm WFM: Teleopti is able to integrate with other sources, such as first point resolution. Due to the close integration with the storm platform, storm WFM: Teleopti received information in real time which allows up to date and accurate workforce tracking and stats.

storm WFM: Teleopti is able to provide all the information necessary for a customer to create all the financial calculations needed.

2.13 Service Integration

We can confirm that the storm platform can integrate with third party systems and databases through the storm INTERGEATE portfolio of APIs.

storm INTEGRATE provides a family of tools that leverage SOA (Service-Oriented Architecture) principles to allow the storm platform to link to any third-party system, database or remote store of information.

Using our custom INTEGRATE APIs (Application Programming Interfaces), cloud-based storm services can be integrated with existing data infrastructure, allowing information to flow between the storm platform and your systems, using a variety of channels.

INTEGRATE can obtain data from remote systems and combine this with FLOW and VIEW services to provide powerful value-added display, service monitoring, control and reporting capabilities.

INTEGRATE allows you to control and personalise storm services, enabling them to enjoy new benefits from your current data infrastructure.

3. Migration Strategy

- As an existing services provider to the Authority, Vodafone will mitigate the risk of transition by continuing the current contracts during the transition until the new service becomes operational. This will mean that the Authority will have one Organisation responsible for the transition of the service to the new platform.
- The new solution will be built in parallel to the existing platform and tested to ensure that the service is offering the required functionality. The storm contact centre service will then be overlaid onto the new Vodafone One Net Enterprise Cloud platform. There is a dependency on this approach based on the roll out of the UC program

1. Administration and provisioning takes place through the storm service portal, a completely browser based administration system. Administrators can configure all moves, adds and changes through the portal as well as number management, IVR changes and disaster recovery.

2. Numbers which belong to the Authority are ported to Vodafone IN network (if required). Any calls into the Authority are then routed to the storm platform, and intelligence is applied depending on the predefined logic.

3. Calls are passed from the storm platform to the Authority across the Vodafone TDM Voice Network. storm holds the DDI numbers for assigned Agents, and so can identify where to place the call without an IP connection. Calls are queued in the cloud until there is a free Agent or line.

4. Calls are delivered to the Vodafone One Net Enterprise cloud infrastructure from the Vodafone TDM Voice Network. Calls are routed through this service to the Agent.

5. Caller information is passed to the Agents using the storm DTA browser interface, and the call is connected to the Agent using existing infrastructure. As the call is technically routing through the storm platform, full management information (such as call duration, call recordings etc.) are held by the platform.

6. Callers can PSTN pair from any location, and as such can work from home if required to do so. storm can be configured to pass calls to an overflow environment (i.e. overflow contact centre). As all calls are handled by the platform, calls can still be recorded and management information provided.

7. All analytics and reporting are available through the storm web interfaces. Managers and administrators can access these statistics from any browser enabled PC (this can also be restricted depending on security requirements).

4. Support & Service Management

4.1 Service Desk

- The Contact Centre offering is a helpdesk to helpdesk Engagement model. Vodafone's Service Desk is the single point of contact for the Customer Service Desk to communicate service-related issues or requests. Faults can be reported 24 X7 and we will provide the requested support Monday to Friday (except Public Holidays) 08:30 to 17:30 and telephone calls will normally be answered within 20 seconds for 90% of calls. The Vodafone Service Desk provides:
  - Single interface end to end view of service
  - Manage incidents from inception to closure
  - Proactive and reactive management across the service
  - Escalation point across the service
  - Remedy based Service Management system
  - Online Customer Portal for raising and viewing faults only
  - Defined response/restoration time across the Service
  - 2nd / 3rd / 4th Line highly skilled teams

Methods of contact for the Vodafone Service Desk are:

- Telephone
- Email (Only for follow up communication - Faults cannot be logged via mail)
- OnePortal to log and view faults only

The Service Desk is available for the following purposes:

- Incident / Fault Reporting - raising, tracking, updating and management of incidents
- Event Management supported by proactive network management platform teams
- Escalations – raising concerns of progress against Incidents and/or SFRs
- Enquiries & Information – seeking advice and assistance to any questions or issues regarding the Contact Centre services
- Billing Enquiries

Incident Management

The standard offering for Incident Management includes;

- Incidents Logged via telephone or portal
- ITIL BEST Practice based Incident Management Process including:
  - Escalation Management Process
  - Major Incident Management Process
  - Standard Response and Resolution Targets
  - Standard Monthly Incident Reporting

Logging an incident with Vodafone (incident tickets raised by the Authority)

In the event that the Authority experiences a fault with the Contact Centre service, their service desk should report it to Vodafone by phoning the service desk, support as requested is available Monday to Friday 08:30 to 17:30.

The Authority's service desk will be responsible for carrying out first line diagnosis and triage of an incident.

The Authority's Service Desk will be prompted to explain the problem or fault in full through a series of questions in order to expedite initial diagnosis / triaging and to ensure only incidents are passed to the Vodafone Service Desk that are the responsibility of Vodafone in the provision of the Services.

Once the report has been recorded on the Vodafone Incident Management system the SLA measurement process will start and a Remedy unique incident ticket number will be generated for the purpose of tracking the incident.

Incidents will be triaged to allocate a Priority level from 1 to 4 which will then determine the times for both responding and fixing the fault. Priority levels and SLAs are detailed in Section 4.2 Service Levels.

Updating Incident records

Vodafone shall keep the Authority informed of the progress of their reported incident. The standard updates per severity are as per the table in Section 4.2 Service Levels.

Incident Resolution

The Vodafone Service Desk will retain ownership of all Incidents, on behalf of the customer when passed to Vodafone until the incident has been cleared. the Authority's resumes ownership when the incident is passed from the Vodafone Service Desk to the Authority service desk.

Major Incident Management

A Major Incident (MI) is an event that has significantly impacted, or has the potential to impact, multiple customers either directly or indirectly. Less frequently and on a case by case basis Vodafone can call an MI for an individual customer, if this is agreed as the right thing to do by the Major Incident Manager and the Service Incident Manager, and is usually the result of a core network failure.

Vodafone has established a separate Major Incident Team as part of this process to ensure that activities are co-ordinated, so that the incident can be resolved promptly. It also ensures that the incident impact and the progress towards resolution are communicated to our customers, as well as relevant internal teams.

After the incident has been resolved a post-incident review and report ensures that Vodafone identifies the underlying cause and future mitigation and can share this with our customers.

Escalation Management

Vodafone recognises that it may be necessary to invoke escalation procedures at pre-defined times during the life of an incident. Vodafone perceive the purpose of the escalation procedures to be two-fold:

1.   To ensure that the appropriate level of resource is available to achieve a resolution to a service incident within committed Service Levels by involving progressively more senior Vodafone managers in the resolution process
2.   To ensure that any on-going business impact on the Authority resulting from a service incident is both understood and effectively managed.

The escalation process will commence when incidents occur, and service is not, or is unlikely to be, restored within the Service Level resolution time scales or when a service Outage is particularly sensitive, and it is mutually agreed that a higher level of escalation may effect a quicker resolution, immediate escalation may take place.

Escalations can be invoked by the Authority or Vodafone. All escalations by the customer must be made via the Vodafone Service Desk in the first instance.

If the Authority requests an escalation, the Vodafone Service Desk will confirm that the escalation has been accepted. The Vodafone Service Desk will arrange the next escalation call with the Authority within 30 minutes to acknowledge the escalation and agree next steps & the communication plan.

Level 5	• **Customer Service Director** • Supports Escalations levels and assist with peer to peer engagement • Communicates update if required
Level 4	• **Head of Customer Service Desk** • Supports Escalation levels with Peer to Peer Engagement • Engages and supports level 5 • Communicate updates if required
Level 3	• **Service Desk Operations Manager** • Drives to resolution with Peer to Peer Engagement • Engages further Senior Management • Communicates Updates
Level 2	• **Service Desk Team Manager** • Drives to resolution with Peer to Peer Engagement • Engages Level 3 • Communicates Updates
Level 1	• **Escalation Manager** • Drives to Resolution with Peer to Peer engagement • Engages level 2 • Communicates Update
Service Desk	• **Service Desk** • Owns the End to End Incident Management Process • Engages Level 1 • Communicates Updates

Figure 24: Escalation Matrix

Change Management/Outages

Vodafone Change Management owns the end to end Change Management process for the Authority.

Outages to Contact Centre Services may be necessary from time to time. Vodafone will:

— Use reasonable endeavours to give the Authority as much notice as reasonably possible and, in any event, not less than five Working Days' notice of any Outage, which will affect the availability of the storm IP Contact Centre Services;

— Use reasonable endeavours to minimise the number of Outages and any subsequent disruption to the Authority

Service Management Proposition

The current proposal for the Authority uses the Service Management Enhanced proposition from Vodafone. The Enhanced Service Management proposition offers the following:

— A field based team with increased levels of senior contact,

- Detailed business operating manual
- Service reporting with more in-depth management information and analysis
- Monthly Service Review, in person
- Escalation Management
- Service Improvement Plan
- Self Service Portal (OnePortal)

Please see table below which details all the Vodafone Service Management Propositions:

Service Management Propositions

	Lite	Standard	Enhanced	
Self Service Portal	✓	✓	✓	
Service Guide	✓	✓	incl. in BOM	
Service Improvement Plan	✓	✓	✓	
Customer Feedback	✓	✓	✓	
Escalation Management	✓	✓	✓	
Service Reporting	Quarterly Lite	Monthly Standard	Monthly Enhanced	
Service Review	Quarterly (Audio)	Monthly (Audio)	Monthly (In Person)	
Service Inventory	✓	✓	✓	
Integrated Governance	Proactive SE	Proactive SE	Proactive SM Reactive HoS	
Business Operating Manual (BOM)	x	x	✓	
Executive Review	x	x	✓	
KPI Dashboards	x	x	Optional	
Balanced Scorecard	x	x	Optional	

Figure 25: Service Management Propositions

4.2 Service Levels

The objective of Service Level Management is to drive service quality improvements by monitoring and reporting upon the service performance, achievements and raising actions onto agreed service improvement plans.

Monthly Service Reports Provide
- Confidence that the Customers' organisation can operate reliably
- Performance reporting across incident, availability, order and billing management
- Recommendations for service enhancements to improve your business performance

All metrics will be based upon information from the Vodafone Service Desk systems and detailed within the monthly report. Incident ticket reference and detail will be available within this report.

The Service Report will be created and made available to the Authority in the agreed time period, typically the first 10 working days of the month.

The Vodafone Service Manager will ensure that the reports are produced, and are discussed at the appropriate Governance forums. The Service Manager will use these reports to ensure that Vodafone remains compliant to the Authority's contractual requirements.

Service Level Targets (Availability)

The target for the availability of the Platform in each Monthly Measurement Period is 99.99%.

Incident Resolution Service Level Targets

	P1	P2	P3	P4
Fix	5 Hours	1 Working Day	90% within 10 Working days	Reasonable Endeavours
Definition	Total loss of IP Voice Service. This means a total service malfunction affecting the core Vodafone network or any elements of the Platform that are used by you and which impact a majority or all of our customers for the Service. This excludes faults outside of our network and the Platform.	Partial loss of the IP Voice Service. This means a severe degradation of service that has a significant detrimental effect on the ability of the Platform to perform normal communications for all of our customers for the Service. This excludes faults outside of our network and the Platform.	Degradation of IP Voice Service performance. This means a minor degradation of the service from the Platform which has an adverse effect on your operation of the Service and which affects a small number of our customers for the Service.	All non-service affecting Faults. This means a Fault that is not service affecting, but requires some corrective action. This also includes information requests.

Table 8: Incident Resolution Service Level Targets

One Portal Administration

The Authority will be given access to a Vodafone secure unified portal, known as the OnePortal. The Vodafone OnePortal gives customers a self-service dashboard for accessing services, tracking progress and communicating with Vodafone business.

- Raise and view incidents
- Contact your service and account teams
- View, filter and download incident data
- Easy print, update and close ticket options
- Critical ticket info grouped together for easy reference

4.3 Performance Monitoring & Reporting

Vodafone have proactive monitoring of the IP Voice Service for a range of alarms which indicate to us if there are any issues impacting your service.

4.4 Continual Service Improvement (CSI)

Vodafone are committed to the process of continuous improvement and improved efficiency of the Services. Vodafone will take the initiative in the identification and evaluation of new business processes, technology and improvements for application to the Services and respond to any the Authority requests for information in respect of potential improvements to the Services.

CSI Initiation

The following will form the subject of CSI performance reviews;

— Customer Satisfaction Survey
— Service Level Agreement and/or Service Level Target Failures
— Customer notification
— Contact Centre Service Management notification
— Complaints Process

Identification of any of the following emergent issues may trigger a requirement for continuous improvement:

— New and evolving relevant technologies which could improve the Services and technological advances potentially available which the Authority may wish to adopt
— Potential improvements to the Services including the quality, responsiveness, procedures, benchmarking methods and likely performance mechanisms
— Potential improvements to the interfaces or integration of the Services with other services provided by 3rd Parties or the Authority which might result in efficiency or productivity gains or in reduction of operational risk
— Changes in business processes and ways of working that would enable the Services to be delivered at lower costs and/or at greater benefits

Continual Service Improvement Methodology

Review
- Weekly senior governance forum
- Contractual SLA performance
- Service improvement plan (SIP)
- Regular service reviews
- Market trends and insight

Plan
- Service action management
- Clear problem statements
- Mutually agreed success criteria
- Improvement actions, due dates
- Operational Ownership
- Service improvement plan (SIP)

Our People

Six Sigma principles ensure a consistent and professional approach to continual service improvement.
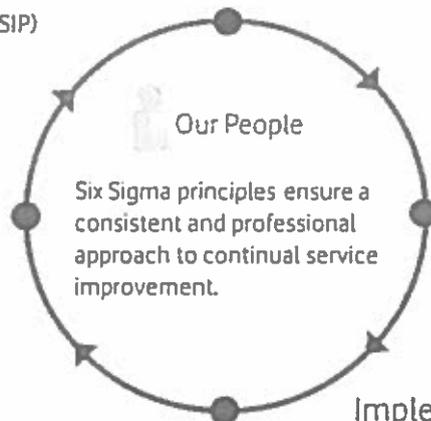
Measure
- Regular service performance reports
- Customer feedback programme
- Success criteria evidence provided

Implement
- SIP status updates
- Internal progress reviews
- Invoke escalation where required
- Weekly senior governance forum

Figure 26: Continual Service Improvement Methodology

Service Improvement Plan

Continual Service Improvement Plans (CSIPs) will be tracked and managed via the Service Action Management (SAM) tool.

CSIPs that require a significant change that will affect the Authority will be delivered via the agreed Change Management process and where appropriate be delivered as a Project.

Vodafone will work collaboratively with the Authority to ensure the above Service activities are aligned within the appropriate PSNS Call-Off Form and Schedules. During Transition we will work with the Authority to agree and document the required Operational activities and processes in the Call-Off Operating Manual (COOM)

4.5 Storm Service Portal

storm Service Portal is a powerful, flexible multi-channel communications management system that allows you to configure how inbound communications will be handled.

It includes functionality for:

- Routing incoming communications to destinations and services based on (for example) the number called, the target email address, the time of day, or the sender's identity or geographical location. Facebook, Twitter, SMS, IM, text, email and voice messages are all supported
- Configure outbound campaigns to contact pre-selected customers using email, text and SMS messaging or live voice, as appropriate for the campaign.

The storm Service Portal lets you manage all your underlying telecommunication services quickly and effectively via one simple, intuitive GUI. Services and routing plans for incoming communications can be set up and implemented quickly, with subsequent amendments taking effect immediately.

Each contact number, address or account that your company publishes is termed an access point.

The Service Portal GUI allows you to:

Configure the access points your organisation uses, grouping them by department or (for voice calls and SMS and email messages) by incoming calling line identity (CLI) or email address. This facilitates intelligent call routing and allows you to make changes affecting more than one access point in just one place

- Set up routing instructions – for normal business operations, but also for disaster recovery (DR) situations to ensure business continuity in emergency situation, so that no incoming communications are lost due to, for example, a power outage
- Set up routing instructions based on the time of day/day of week or on holiday calendars, to ensure that incoming communications are handled adequately outside of business hours or during holiday periods
- Create and implement interactive voice response (IVR) services, using your own voice messages, hold music and whisper prompts
- Configure at individual access number level whether such features as call recording, voicemail and whisper prompts are to be enabled
- Implement voicemail strategically, for example to capture voice calls received out-of-hours or calls that are not answered within a predefined length of time
- Set up, monitor and manage OUTBOUND campaigns.

The route plans used to define how incoming communications should be handled can be configured at individual access point level, or they can be shared by more than one access point and by access point groups.

storm allows you to record calls, for monitoring and training purposes or to meet regulatory requirements. Its call recording facilities are flexible – the Service Portal allows you to set call recording on at access number level, and to stop and start call recording on an ad hoc basis.

A full in-the-cloud voicemail service is provided, and you can use the Service Portal to set the messages and personal greetings to be used when calls are routed to voicemail, as well as to manage the content of voicemail boxes.

The facilities offered by the Service Portal are enhanced when run with other storm products, including:

- FLOW™, for custom IVR creation
- CONTACT™, for contact centre functionality, including agent management and intelligent automated call distribution (iACD®)
- PBX, for cloud-hosted IP voice services
- SIP™, for SIP trunks capable of routing inbound calls from any network as business-grade Voice over IP (VoIP) over an IP network.

We have included screenshots of the system interface below:

Figure 27: storm Agent Desktop
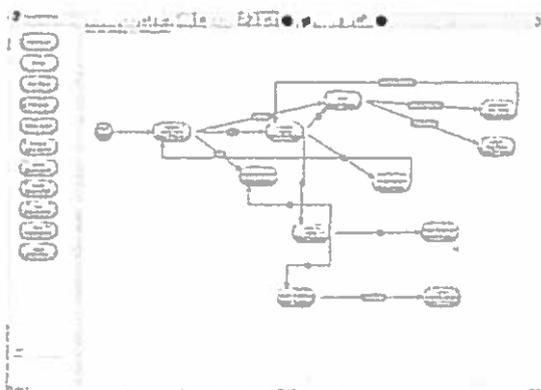
Figure 28: storm FLOW IVR builder

Figure 29: storm report builder

4.6 Customer Training

Training is an essential part of any storm deployment, and is provided for Administrators, Supervisors, Agents and Users.

Training modules reflect the modular nature of our product. These modules are combined together to reflect customer's actual deployment and, where bespoke FLOW scripts are used, training modules specific to those scripts are created.

All training is presented by our in-house trainers and can be delivered in a number of ways:

— On site at the customer's location (we simply require a suitable meeting room, large screen or projector, and an Internet connection)
— At Content Guru's dedicated facilities in Bracknell, Berkshire (we provide a buffet lunch and can arrange local accommodation if required)
— WebEx video conferencing (typically for two-hour durations, ideal for introductory sessions, demos and refresher training).

Training is delivered as part of the Project Plan which is managed by our Project Manager. Prior to the course, the Project Manager will liaise with the customer and the training department to prepare an outline schedule detailing the syllabus to be covered and durations required for each element of training. Trainers will send pre-training questionnaire forms to allow attendees to make us aware of any specific local requirements and to provide an outline of their relevant experience. These details are used to ensure the training course fits the customer's requirements and is suitable for the needs of all attendees.

Training modules consist of a combination of theoretical sessions and practical tasks, with a focus on practical experience and configuration where possible.

System Administrators and Supervisors are trained in all aspects of the system and its configuration. Upon successful course completion, Administrator and Supervisors are formally certified by Content Guru, and will be invited to attend refresher training after a period of 12 months, to ensure that they keep abreast of the latest features.

Attendees are given reference copies of any presentations used, and all training is designed to allow trained employees to pass on the skills they have learned,

5. Security

Vodafone are committed to providing world-class security. We deliver some of the most secure telecommunications services in the world and have a proven record for delivering trusted mission-critical services to a wide range of customers, including government, utility, finance, and retail sectors.

We have attached a core security statement below;

Vodafone Core
Security Statement

Vodafone deliver storm in partnership with Content Guru. Content Guru and the storm platform have the following accreditations and awards for security and quality management:

- ISO27001 – LRQA data security standard
- ISO9001 – LRQA quality management standard
- TickIT+ - software development standard
- PCI-DSS & PA-DSS Level 1 – payment card industry and payment application data security standards
- IL3 accredited data centres
- All staff are BPSS (Baseline Personnel Security Standard) screened.
- Certain staff carry SC (Security Check) level security clearance.

Firewalls and Session Border Controllers

Firewalls exist at the significant borders within the network; both within the platform and from desktop infrastructure. The Firewalls are always active and cannot be deactivated by the user.

The storm platform uses Cisco ASA Firewalls as standard. The ASA Firewall is a market leading, robust system conforming to industry standards. To ensure resilience to spoofing attacks the ASA Firewall uses a stateful operating protocol. Intrusion detection is incorporated into the ASA system.

ACME Packet 4500 Session Border Controls (SBC's) are also used. These are managed by the Vodafone storm Network management Centre (NMC).

IDS, Anti-Virus, Device Management and Patch Management

IPS/IDS, Anti-Virus, and Vulnerability management are in place to mitigate risk of attacks and pro-active notifications of potential attacks. The Vodafone storm Network Management Centre, (NMC), manages these services and the Network.

The storm platform utilises a Qualysguard security application to regularly monitor and report on our systems. Where vulnerabilities and new patches are identified, these items are actioned immediately by our security management team.

During the build, development and testing stages a Centre for Internet Security (CIS) Security Benchmark tool is used to check systems for vulnerabilities prior to implementation and/or shipment.

Symantec anti-virus is deployed across all platforms and performs regular scans, the anti-virus definitions are kept up-to-date and rolled out frequently. These measures ensure that any compromise of the system will be detected internally.

To reduce opportunities for the system to be compromised, all unnecessary elements are deactivated, this includes;

- Unnecessary services
- Unnecessary hardware interfaces
- Pre-set service accounts and passwords

System security upgrades and patch updates carried out on the storm platform are carried out such that there is no disruption to any live services. Where such updates require system or software restarts the process is carried out in stages so that there is no service disruption.

Patches are tested prior to their deployment and are generally deployed each quarter unless the patch has to be deployed urgently. (typically within days/weeks of the vulnerability being detected)

Vulnerabilities are scanned quarterly (Qualys and WSUS) and patches applied accordingly. Qualys emails the NMC with weekly notifications or the latest vulnerabilities along with their severity rating, so ad-hoc patches can be applied if deemed necessary. Symantec Anti-virus is also installed on all systems and weekly scans performed.

The storm platform uses Cisco ASA Firewalls as standard. The ASA Firewall is a market leading, robust system conforming to industry standards. To ensure resilience to spoofing attacks the ASA Firewall uses a stateful operating protocol. Intrusion detection is incorporated into the ASA system.. IDS/IPS is also configured on the firewall. The configuration is tested on a quarterly basis.

Access to the storm platform

We have included a diagram, the figure below, which details the physical and digital access users and engineers have to the platform.
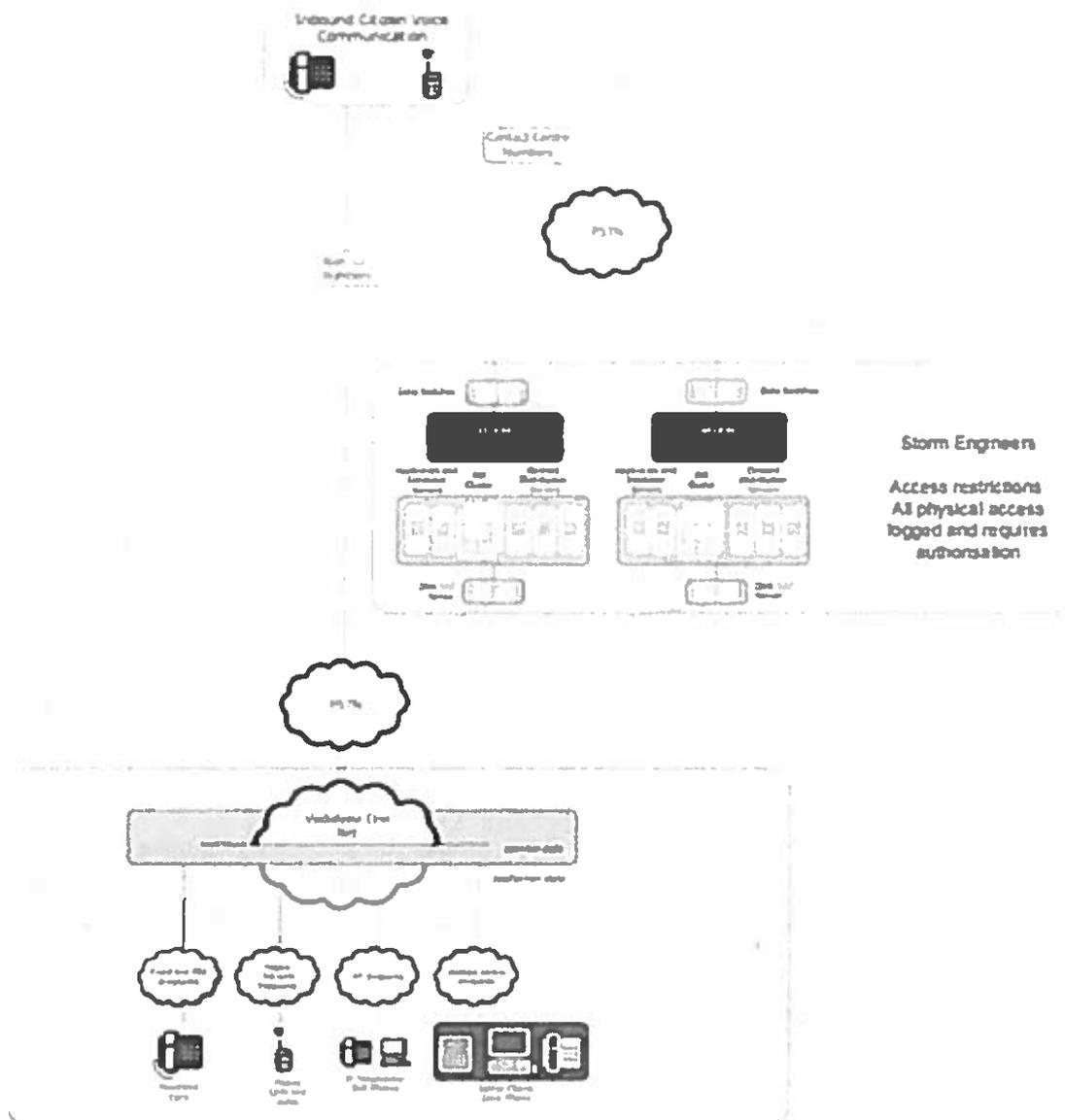
Figure 30: Security demarcation points across the solution

- Access to voice recordings
  - Access to voice recordings through the storm RECORDER interface is password protected using RSA SecurID tokens for the login.
- storm administration and management portal access (technical overview)
  - User accesses the portal through the https web address. Logon credentials entered and RSA SecurID token used to authenticate use.
  - Web servers hold data to authenticate user and allow login on successful validation.
    - Any provisioning data (e.g. call scripts, routing rules, voice prompts etc.) propagated to the INX cluster at each site.
    - All requests are communicated across the internal storm data network (intra-site and inter-site).
- storm reporting portal access
  - User accesses the portal through the https web address. Logon credentials entered and RSA SecurID token used to authenticate use.

- Web servers hold data to authenticate user and allow login on successful validation.
- Data for reporting accessed by Web Server from the Stats and Reporting Servers.
- Mechanism for reporting data to reach Stats and Reporting Servers
- All data is transmitted across the internal storm data network (intra-site and inter-site).
- storm call recordings storage
- Calls are handled by the nodes in the INX cluster and any recordings made locally on them
- storm call recordings access
- User accesses storm RECORDER portal through https web address. Logon credentials entered and RSA SecurID token used to authenticate use.
- Web servers hold data to authenticate user and allow login on successful validation.
- Recordings accessed by Web Server from the Recordings Storage Servers.
- Network Management Centre (NMC) and Remote Access

The storm Platform and its Management LAN are managed and monitored by the dedicated storm Operations desk in the NMC. This is monitored 24 x 7. Real-time alarms are configured to alert the operations team of any serious errors. Manual reviews of log files from all systems are undertaken throughout the day to identify any further technical issues or potential security breaches.

Only employees who are responsible for supporting the platform have the respective access rights. Access is two stage process involving logging on via VPN, then through remote access management software

The NMC is located in Bracknell. Alternative access is provided via remote access.

All Staff who require access to the NMC remotely are required to use specific company equipment. Access involves accessing the NMC via an IP Sec VPN tunnel. Users then need to use RSA Secure ID Token to login. User's then remotely access through to storm IP Sec VPN tunnel authenticated via Role Based Access Control (RBAC).

All storm NMC staff are SC cleared. The SC check is managed by the Vodafone Vetting team who manage all vetting requirements for Vodafone.

storm Data Centre Locations

The storm Service is located at two Vodafone Secure Data Centres at Watford and Park Royal. These Data Centres are part of the UK Government Critical National Infrastructure. The addresses of both data centres are below.

Vodafone Watford Data Centre

Units 5&6, Imperial Way

Watford

WD24 4PP

Vodafone Park Royal Data Centre

Units 5 - 9, Matrix Ind. Park

900 Coronation Road

London

NW10 7PQ

Both Vodafone data centres have the following credentials:

— ISO/IEC 27001:2005 Compliance
— ISO 14001:2004 Accreditation
— ISO 22301:2012 Accreditation
— PCI-DSS Compliance

6. Sustainability

In accordance with schedule 2.3 (Sustainability Requirements and Plan) of the Call off Terms we shall prepare and deliver a fully completed and up to date Sustainability Plan within 20 days after Effective Date or such other period as agreed between the Parties.

We will build a sustainable future by delivering products and services that enable positive economic, social and environmental outcomes for the Customer Authority.

We are committed to providing a level of sustainability which is in accordance with Good Industry Practice, the Law, the Standards and this Agreement including the Service Requirements.

We are committed to environmental sustainability and has ISO 14001 certification for our Environmental Management Systems, covering all of our UK operations. This commits us to full compliance with legislation and other relevant requirements. Furthermore, we will act to ensure full compliance by the Customer Authority to relevant environmental legislation and commitments, such as the Environmental Information Regulations.

Our UK Environment Policy sets out our commitments to environmental sustainability and is endorsed by our Chief Executive Officer.

Our 2013/14 Sustainability Report can be found at:

http://www.vodafone.com/content/sustainabilityreport/2014/index.html

Greening Government ICT

We will ensure that the design of the Services maximises the contribution to the Greening Government ICT initiative whilst minimising environmental impact.

Sustainability Targets

We are committed to reducing the impact of our operations on the environment through reducing waste, bringing down water usage and making procurement more sustainable. We are committed to setting improvement targets, measuring progress against these, putting programmes in place and assessing performance.

We will submit details of relevant sustainability targets to the Customer Authority upon request.

Carbon Reduction and Carbon Neutrality

We are committed to reducing the carbon emission resulting from the telecommunications network. We seek to reduce carbon and other greenhouse gas emissions by:

- ensuring technology, applications, system, data and service architectures and designs minimise the use of equipment and the power required to operate it
- reducing power demands by reducing duplication of ICT equipment through consolidating and rationalising ICT infrastructure wherever possible
- aspiring to the EU Code of Conduct on Data Centres' Energy Efficiency version 2.0 (or later) and the associated Best Practices
- ensuring that any server and communications rooms that are our responsibility are managed to minimise the environmental impact
- ensuring that use of any Customer Authority server and communications room, that is not our responsibility, is approached in such a way as to minimise the environmental impact

- reporting to the Customer Authority the measured power usage effectiveness (PUE) for each Data Centre used in providing the Service upon request. This shall be calculated and reported in accordance with the current 'Usage and Public Reporting Guidelines for The Green Grid's Infrastructure Metrics PUE/DCIE' available at www.thegreengrid.org
- seeking to maximise the useful life of any ICT equipment procured for use in providing the services
- applying energy-saving settings to equipment including use of automated energy-saving tools
- purchasing our electricity from 100% renewable sources. Evidence that the electricity purchased to power our network is from renewable sources will be made available to the Customer Authority upon request.

Data Centre Efficiency

Our Data Centres progressively work toward green solutions during each phased build programme. Enhancements made include:

- CAC 'Cold Aisle Containment' - currently in use in 7 of the 10 hosting rooms at our Swindon Internet Solutions Centre, with the final 3 on plan for 2014/15.
- Blanking panels used in cabinets to remove air bypass of devices and reduce air wastage.
- Underfloor airflow management programs to effectively use the air generated in the best way
- Variable speed fans in all air handler units to reduce the electrical consumption of these devices.
- Free/Fresh air cooling. We deploy free air cooling for approx. 80% of the year either in total or in part to our hosting rooms at Swindon.
- PIR and timed lighting
- All new build uses industry leading UPS systems, generators and plant to ensure we take advantage of technology advances, e.g. Trinergy UPS providing up to 99% energy efficiency.

Resource Efficiency and Waste Management

We will comply with all relevant waste legislation and will seek to minimise waste production by applying the following principles:

Wherever possible, ICT equipment will be allocated for re-use within the services, avoiding procurement of new equipment

Provide reporting to the Customer Authority on destinations (reuse, donation, recycling, and disposal) of redundant ICT equipment, including weight of disposed equipment, upon request

Ensure packaging is minimised, and that it is reusable or consists of recycled and recyclable materials that are recycled after use.

7. BCDR

In accordance with schedule 6.5 (BCDR Provisions) of the Call Off Terms we shall develop BCDR Plan within 3 months of Effective Date or such other period as set out in the Implementation Plan or as otherwise agreed in writing by the Parties and submit the plan to the Customer Authority for approval.

BCM Whitepaper

8. Exit Strategy

As part of the Vodafone Transition methodology and within 3 months (or such other period as is specified in the Implementation Plan or otherwise agreed by the Parties in writing) of the contract effective date, we will deliver an Exit Plan to the Authority.

A series of meetings with relevant Authority stakeholders will be arranged to agree the content of the Exit Plan. The Exit plan will be implemented in accordance with the Exit Management strategy as defined in PSN call off Schedule 6.4. The Exit Plan will be reviewed and maintained during the lifecycle of the contract to reflect any changes to the services provided by Vodafone.

Vodafone acknowledges that Notice of Termination can be served for a variety of reasons and will reflect the different options for both Ordinary and Emergency Exit within the Exit Plan.

We will appoint a Project Manager on receipt of Notice of Termination to establish governance, attend meetings and complete all activities required for a seamless transition of services from Vodafone to the Authority and/or their new supplier.

The scope of the Exit Plan is summarised as:

- to confirm all appropriate third party and our contracts terminate or novate, as appropriate, to Customer and/or their third party supplier in line with the Service being transferred;
- to agree assets to be transferred to Customer and/or their third party supplier, agree process by which the transfer will take place and facilitate a smooth transfer;
- to agree the data and the format of the data to be transferred to Customer and/or their third party supplier;
- to confirm the Services and transfer them to either Customer and/or its third party supplier according to a schedule to be agreed by us and Customer;
- to confirm and to transfer those individuals determined to be 'in-scope personnel' in accordance with the then current Transfer of Undertakings (Protection of Employment) Regulations;
- always subject to confidentiality requirements and, where permissible, always considering our proprietary information / data, execute the transfer of applicable knowledge for the Services to enable Customer and/or their third party supplier to run the services;
- to agree and pay all outstanding payments due between the parties.

A range of professional service resource would be required to ensure successful completion of a decommissioning process. These might include:

- Program Manager
- Project Manager
- Hosting Solution Manager
- Solutions Consultant
- Hosting Design Specialist
- Technical Design Specialist
- Hosting Engineering resource (Security, Desktop, Application etc.)

We will work in collaboration with the Authority to produce a detailed project plan with the nominated service provider and will include a specific detail of transfer of equipment. E.g. secure courier to transfer equipment or secure IT Specialist.

Any equipment that needs to be disposed of will follow our secure decommission process.

Our approach to project compliance consists of several steps, all of which are designed to ensure that the project outputs are completed with the specification, proposal and plan agreed with the Authority.

We regard demonstration of compliance as starting with the project, not just an activity tagged onto the end of the implementation. The steps are therefore designed to ensure the plan and the activities to deliver it are completed with clarity, traceability and accuracy.

The compliance steps are:

Step	Description
Ensure an exit plan design and schedule is agreed	An agreed starting position, setting scope, expectation and responsibilities can be reported and tested against. Demonstrating and confirming compliance against a moveable and fluid base is impossible.
Ensure acceptance criteria are agreed	Complementing the exit plan design and schedule, the acceptance criteria to confirm compliance should be realistic and agreed. For example acceptance criteria can be successful completion of specific tasks or agreement on a final version of specific deliverables.
Plan compliance tasks	Compliance tasks need to be managed and therefore it must be included in the project schedule and in the project quality and acceptance approach. This way project Implementation will support management towards compliance.
Checkpoints	Amongst the planned compliance tasks will be checkpoints where actual status of the exit plan is reviewed against agreed baseline and acceptance criteria. The review will allow opportunities to discuss progress, issues and changes within the context of impact on the overall exit plan.
Reporting	Project delivery status reports will be produced each week. The reports will capture progress to date against milestones, deliverable status and highlight issues/risks associated with delivering the exit plan. The reports ensure regular visibility and communication of progress against the Exit Plan demonstrating compliance and ensuring deviation is only agreed via managed processes. These reports will provide input to the checkpoints. At the conclusion of our activities, an Exit Plan completion report will be produced summarising the actions and outputs completed and providing a high-level audit trail and confirmation for the Authority.
Exceptions will be managed via change management	During design, planning and implementation of the Exit Plan, especially with potentially input from several parties, it is inevitable additional items or alternatives to agreed ones will arise. These will be managed via an agreed Change Management process that will ensure changes to the Exit Plan are only made after impact analysis, solution definition and estimation are completed and agreed.

Table 9: Compliance Steps

Deliverables

We expect the following Exit Plan deliverables will be required. The deliverables have been categorised as three types:

— **Commercial**: deliverable that defines the commercial coverage required for our exit plan activities

— **Planning and Design**: deliverables that detail the activities, approach, solution and timeframes for the exit plan

— Implementation: deliverables produced through execution of the exit plan.

This list of deliverables is based on current knowledge of what may be appropriate. It will change and can only be confirmed once requirements for the Authority replacement service provider are agreed.

Commercial

#	Deliverable	Description
1	Exit Plan Proposal	Commercial proposal based on confirmed exit requirements for planning, designing and implementing the Authority exit plan.
		This will need to be produced and agreed prior to exit plan design, planning and implementation. There will be an associated cost to this work.
		The Exit Plan Proposal deliverable will include a high-level project schedule; approach and resource plan to meet the confirmed the Authority Exit Plan requirements.

Table 10: Exit Strategy - Commercial

Planning and Design

#	Deliverable	Description
1	Project schedule	A detailed project schedule for our activities (e.g. MS Project plan) that integrates with the Authority and replacement contractor schedules.
2	Project Initiation Document (PID)	Project Management asset detailing the project delivery approach, communication plans, quality approach, reporting and governance we will use to define and execute the exit plan.
3	Exit Plan Design	A specification and detailed design of the activities in response to requirements. This will include definition of security, technical, operational and knowledge activities related to the exit.
4	Exit Plan	A specification for the test and verification approach and methods that will be applied to ensure outputs are of required quality and integrity.

Table 11: Exit Strategy – Planning and Design

Implementation

#	Deliverable	Description
1	Customer Operations Guide	A document describing the tasks, activities and dependencies that delivery of the Managed Service requires, supporting knowledge transfer and service transition. This will essentially be a collection of all relevant Local Work Instructions (LWI).
2	Solution Design Document (SDD)	The SDD which will include details of: • The versions of all the software components used to deliver the latest version of the Customer production environment. • Details of all hardware. • Equipment ownership. Note that this may not be required if a Customer is to be delivered by different software.
3	Open service desk tickets	A documented record of the open service desk tickets at time of transfer
4	Exit Report(s)	A documented report that confirms the output, identifying any issues and confirming successes.

Design and execution of application transfer, including data and knowledge transfer.

Table 12: Exit Strategy - Implementation

Knowledge Transfer

Both the Authority and the new service provider will require training in the continued provision of service and this will be supported by Vodafone.

This will involve:

- — Assessing the training requirement with the Authority and new provider;
- — Creation of training material
- — Delivery of training.

We suggest that the knowledge transfer tasks will be delivered through a set of workshop activities and subsequently support will be made available for clarification and confirmation of points not covered in the initial knowledge transfer.

The workshops will be conducted as briefing sessions and meetings, with documentation and the Authority's system available as reference materials.

It will be necessary to provide training for key members of the Replacement Contractor's personnel in connection with the continuation of the provision of the Managed Service. Key roles are identified as follows for attendance at a series of training workshops.

- — Sales and support technical staff
- — Support desk staff
- — Commercial and Billing staff

Closure

In summary, we will appoint the appropriate resource to support the transition using our robust methodology and governance processes to provide the Authority with a seamless transfer to their new service provider. We will be available for an agreed period to answer any questions until such time as joint agreement is reached between both parties that all activities have been completed and we can confirm project closure.

Gantt Chart — Microsoft Project

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
126	Complete documentation	1 day	Wed 09/09/15	Wed 09/09/15		Storm
127						CQC
128	Plan	1 day				Storm
129		1 day				Storm,CQC
130		1 day				Storm,CQC
131		1 day				Storm,CQC
132	Administration training	1 day				Storm,CQC
133	Business ... Complete				2	
134						
135	Porting number ... 10 numbers – see notes			17/08/15		
136	Customer sign Letter of Authority to allow porting		Mon 17/07/15			CQC
137	... to allow porting	35 days			136	Vodafone Project Manager
138	... Not ...		Mon 17/08/15			Vodafone Project M...
139						
140	Sign Off				142	Storm
141	minimum leaders	1 day				CQC
142	User acceptance testing	1 day			142	Storm,CQC
143	... ...	1 day			142	Storm,CQC
144	Post Gtt amendments	1 day				Storm,CQC
145	... maintenance operational	5 days			46	CQC
146	...	0 days				Storm,CQC,Vodafo...
147	Sign Off	0 days	Wed 01/10/15	Thu 01/10/15	144	
148	Testing complete	0 days	Thu 01/10/15	Thu 01/10/15		
149						
150	Service Management	51 days	Thu 16/07/15	Thu 24/09/15		

Legend:

Task	Milestone	External Milestone	Manual Summary Rollup
Split	Summary	Inactive Task	Manual Summary
	Project Summary	Inactive Milestone	Start-only
	External Tasks	Inactive Summary	Finish-only
		Manual Task	Deadline
		Duration-only	Progress

ID	ⓘ	Task Name	Duration	Start	Finish	Predecessors	Resource Names
151		Engage with CQC 1st to confirm process	1 day	Thu 16/07/15	Thu 16/07/15	82	Vodafone Service Transition
152		Draft process	? days		Thu	151	Vodafone Service T
153		UAT as part of delivery	1 day	Wed 23/09/15	Wed 23/09/15	143	Storm,CQC,Vodafo
154		Sign off UAT	1 day	Thu 24/09/15	Thu 24/09/15	153	CQC,Vodafone Ser
155		Service go live	0 days	Mon 17/08		8	
156							
157		Project	2 days	Fri 02/10/15	Mon 05/10/15		CQC,Vodafone Pro
158			1 day	Fri 02/10/15	Fri 02/10/15	149,150	Vodafone Project
159		Billing	0 days	Fri 02/10/15	Fri 02/10/15	158	Storm,CQC,Vodafo
160		Sample project delivered		Mon 05/10/15	Mon 05/10/15	159	CQC,Vodafone Pro
161		Project close	0 days	Mon 05/10/15		160	

Project: Storm Plan	Task		External Milestone	◆
Date: Wed 20/05/15	Split		Inactive Task	
	Milestone	◆	Inactive Milestone	◆
	Summary		Inactive Summary	
	Project Summary		Manual Task	
	External Tasks		Duration-only	
			Manual Summary Rollup	
			Manual Summary	
			Start-only	⊏
			Finish-only	⊐
			Deadline	⬦
			Progress	

ID		Task Name	Duration	Start	Finish	Predecessors	Resource Names
101		Multi Cl... (...l P.C solid media)	2 days	Tue 28/07/15	Wed 29/07/15		
102							
103		Design an Mana... ...ption... Delivery for DDI number provision					
104							
105		...project					
106		IVR and contact call and SMS requirement		Thu 30/07/15	Thu 06/08/15	101	Storm
107		...of customer Contact Treatments	6 days	Fri 07/08/15	Fri 14/08/15	106	Storm
108		Requirement Service specification sent over		Mon 17/08/15	...7/08/15	107	Storm,Vodafone T...
109		Sign off implementation by CQC	2 days	Tue 18/08/15	Fri 20/08/15	08	Storm,CQC,Vodafo...
110		Design Phase 1 Complete	0 d...	Thu...		109	
111							
112		Build Storm					
113		Users, hardware, licensing	2 ...			209	Storm
114		...nfiguration applied for the system	2...				Storm
115		Test contact configuration	1 day	Thu 27/08/15		14	Storm
116		IVR Build	2...	Fri 28/08/15	Mon 31/08/15	115	Storm
117		...OPTI provision	10 days	Tue 01/09/15	Mon 14/09/15		Storm,TeleOPTI
118		User Setup	1 day	Fri 28/08/15	Fri 28/08/15	5	Storm
119		...OF... ACD Roles built on CQC Service	1 day	Mon 31/08/15	Mon 31/08/15	6	Storm
120		Storm endpoints confirmed	1 day	Tue 01/09/15	Tue 01/09/15	119	CQC
121		...room setup for admin training	1 day	Wed 02/09/15	Wed 02/09/15	120	CQC
122		Bo... room training: storm leader & user training	1 day	Thu 03/09/15	Thu 03/09/15	121	CQC
123		...endpoints for... training	1 day	Fri 04/09/15	Fri 04/09/15	122	Storm,CQC
124		...site attendance for... training	1 day	Mon 07/09/15	Mon 07/09/15	123	Storm,CQC
125		...site documentation (User Guides, Manuals etc.)	1 day	Tue 08/09/15	Tue 08/09/15	124	Storm

Legend:

Task		External Milestone		Manual Summary Rollup
Split		Inactive Task		Manual Summary
Milestone		Inactive Milestone		Start-only
Summary		Inactive Summary		Finish-only
Project Summary		Manual Task		Deadline
External Tasks		Duration-only		Progress

ID		Task Name	Duration	Start	Finish	Predecessors	Resource Names
		Constraints					
1							
2							
3							
4		Contract Signoff	0 days		Mon 06/07/15		
5		Contract Commencement	0 days				
6							
7		Service Management (Call off Operational Manual)					
81							
82		Governance					
87							
88		Requirements Phase					
89		Schedule project kick off meeting (room, equipment, accomodation)	13 days?	Mon 13/07/15	Wed 29/07/15	89	Storm
90		CQC Define Storm Project Objectives, Plan & Testing)	1 day	Mon 13/07/15	Mon 13/07/15	90	Vodafone Project Manager,CQC,Storm
91		Discovery Workshop	10 days	Tue 14/07/15	Mon 27/07/15	89	Vodafone Project M
92		Information needed for specification	1 day	Wed 15/07/15	Wed 15/07/15	90	Storm,CQC,Vodafo
93		Define For the Specification sent to CG		Wed 15/07/15			Project Manager
94		High Level requirements for IVR Routing	2 days	Thu 16/07/15	Fri 17/07/15	93	Storm
95		Intended Call flow for IVR routing (if available)	0 days	Mon 27/07/15	Mon 27/07/15	91	Storm
96		- Specific requirements for Call Recording	0 days	Mon 27/07/15	Mon 27/07/15	91	Storm,CQC
97		- Required Agent Skill groups and service queues	0 days	Mon 27/07/15	Mon 27/07/15	91	CQC
98		- Agent, Supervisor and Administrative User details (generic if not available)	0 days	Mon 27/07/15	Mon 27/07/15	91	CQC
99			0 days	Mon 27/07/15	Mon 27/07/15	91	CQC
100		Workflow / Customisation Requirements	2 days	Tue 28/07/15	Wed 29/07/15	91	

Task		External Milestone	◆	Manual Summary Rollup	
Split		Inactive Task		Manual Summary	
Milestone	◆	Inactive Milestone		Start-only	C
Summary		Inactive Summary		Finish-only	⊐
Project Summary		Manual Task		Deadline	◆
External Tasks		Duration-only		Progress	

ANNEX 2

OUTLINE IMPLEMENTATION PLAN

**2015-05-19 CQC Lot
2 - Contact Centre Le**

APPENDIX 4

SERVICE LEVELS AND RELATED REMEDIES

1 GENERAL

1.1 For the purposes of Clause 10.5.1 of the Call-Off Terms, the aggregate number of Service Failures (whether the Service Failure relates to the same or to different parts of the Services) exceeds four in any one measurement period.

1.2 For the purposes of Clause 10.8.3 of the Call-Off Terms, the aggregate number of Service Failures shall be four in any one measurement period, which would trigger Warning Notices/increased monitoring.

1.3 For the purposes of Clause 10.8.4 of the Call-Off Terms, the aggregate number of events giving rise to Service Credits and/or Delay Payments shall be five in any one measurement period, which would trigger Warning Notices/increased monitoring

2 SERVICE LEVELS

2.1 In accordance with Paragraph 2.1 of Part A of Schedule 2.1 (Service Levels, Related Remedies and Performance Monitoring) of the Call-Off Terms, the Service Level Targets, Service Criteria (including the Service Measures), Service Failure Thresholds, Service Credits and Repeat Failures shall be as set out below:

The Service Level target for the availability of the STORM Platform in each Monthly Measurement Period is 99.999%.

2.1.1 Availability Service Credits

If the availability of the STORM Platform in the relevant Monthly Measurement Period falls below the Service Level target set out in the Appendix 3, Annex 1 – CQC Lot 2 CC Method Statement then the Customer Authority will be entitled to claim the following Service Credits at the end of each Monthly Measurement Period depending on the length of time the STORM Platform is Unavailable

Availability (i.e. P as calculated above)	Service Credit (% of monthly Service Charge)
99.5% – 99.998%	2.5%

99.0% – 99.499%	▓▓
less than 99.0%	▓▓

For the avoidance of doubt, the Customer Authority shall only be entitled to receive a Service Credit set out in the corresponding row of the table above for the level of availability that has been measured in the relevant Monthly Measurement Period. The Service Credit payable to the Customer Authority is not calculated on a cumulative basis. For example, if the availability of the STORM Platform in a Monthly Measurement Period is less than 99.0% then the Service Credit payable will be 10% of the monthly Service Charges for the relevant month, it will not be 17.5% of those charges.

2.1.2   Fix Time Service Credits

If the Contractor fails to resolve a Severity Level 1 or 2 Fault within the relevant target Fault fix timescales set out in the attached STORM IP Contact Centre Service Schedule in the relevant Monthly Measurement Period, the Customer Authority will be entitled to claim the following Service Credits depending on the length of time beyond the target Fault fix time that the Severity Level 1 or 2 Fault remains unresolved:

Number of hours beyond the relevant target timescale that the Severity Level 1 or 2 Fault remains unresolved	Service Credit
Between 1 and 15 hours inclusive rounded up to the nearest hour	▓▓ of the monthly Service Charges
More than 15 hours	▓▓ of the monthly Service Charges

For the avoidance of doubt, where the number of hours beyond the relevant Service Level target that the Fault remains unresolved exceeds 15, the Customer Authority is only entitled to claim the Service Credits set out in the table above for "More than 15 hours"; it is not entitled to claim Service Credits for the period between 1 and 15 hours.

APPENDIX 5

ADDITIONAL STANDARDS

In addition to the Standards set out in Schedule 6 (Standards) of the Framework Agreement, the Contractor shall also comply with the following further Standards:

N/A

APPENDIX 6

SECURITY PLAN

If required, the Contractor shall complete a Security Plan within 30 working days from the Effective Date.

APPENDIX 7

CUSTOMER AUTHORITY EQUIPMENT AND EXCLUSIVE EQUIPMENT

1 CUSTOMER AUTHORITY EQUIPMENT

In accordance with Clause 14.4 of the Call-Off Terms, the Contractor shall take ownership of the following Customer Authority Equipment:

Customer Authority Equipment	Ownership to transfer to Contractor (Yes/No)	Price (£)
N/A		

2 EXCLUSIVE EQUIPMENT

The following Equipment shall be Exclusive Equipment for the purposes of this Call-Off Contract:

Customer Authority Equipment	Contractor Equipment
N/A	

3 ENCUMBRANCES

3.1 In accordance with Clause 14.8 of the Call-Off Terms and subject to Paragraph 3.2 below, the following Equipment is subject to encumbrances (such encumbrances being discharged upon payment by the Customer Authority of the amounts set out in below): [Parties to complete]

Equipment (excluding Customer Authority Equipment)	Encumbrance/Encumbrancer	Discharge prices (£) and applicable time periods (as per paragraphs

		9.3 and 9.4 of Schedule 6.4 (Exit Management) of the Call-Off Terms)
N/A		

3.2   There shall be no encumbrances of Exclusive Assets except where agreed by the Parties and set out in the table in Paragraph 3.1 above.

APPENDIX 8

OUTLINE IMPLEMENTATION PLAN

Further to the Outline Implementation Plan set out at Appendix 3, Annex 2, the Parties shall work together to agree an updated Outline Implementation Plan in the form set out below, within 30 Working Days from the Effective Date.

In accordance with Paragraph 2 of Schedule 4.1 (Implementation Plan) of the Call-Off Terms, the following Outline Implementation Plan is agreed by the Parties and should include the following (to the extent such are required by the Customer Authority):

Milestone (indicate if Key Milestone/relevant to a Gateway review)	Deliverables (bulleted list showing all Deliverables (and associated tasks) required for each Milestone)	Duration (Working Days/ Months)	Milestone Date	Dependencies	Customer Authority Responsibilities (if applicable)	Link to ATP/ CPP
	Effective Date	-				
	Draft proforma invoice (Schedule 5.1 (Invoicing))	Ten (10) Working Days after the Effective Date				
	Security Plan to be developed (Schedule 2.2 (Security Requirements	Fifteen (15) Working Days after the Effective				

	and Plan))	Date				
	Sustainability Plan to be developed (Schedule 2.3 (Sustainability Requirements and Plan))	Twenty (20) Working Days after the Effective Date				
	Test Strategy developed (Paragraph 4.1 of Schedule 4.2 (Testing Procedures))	Twenty (20) Working Days after the Effective Date				
	Draft Call-Off Operating Manual (Clause 9.14 of Call-Off Terms)	Twenty (20) Working Days after the Effective Date				
	Information Standards — systems and procedures to ensure for areas of control (Schedule 6 (Standards) of the Framework Agreement)	Twenty (20) Working Days after the Effective Date				

	Version Control – procedures to control correct release or version of Deliverables (Schedule 6 (Standards) of the Framework Agreement)	Twenty (20) Working Days after the Effective Date			
	Quality Plan (Schedule 6 (Standards) of the Framework Agreement)	Twenty (20) Working Days after the Effective Date			
	Draft Detailed Implementation Plan (Clause 3.2 of Call-Off Terms)	One (1) month after the Effective Date			
	Test Plans developed (Paragraph 5.1 of Schedule 4.2 (Testing Procedures))	Thirty (30) Working Days after the Effective Date			
	Test Specification developed (Paragraph 7.1 of Schedule 4.2	Ten (10) Working Days prior to start of			

	(Testing Procedures))	Testing			
	Testing (including Fail Date)				
	Contractor to initiate a project with the aim of achieving ISO20000 (IT Service Management) certification (Schedule 6 (Standards) of the Framework Agreement)	Three (3) months after the Effective Date	Eighteen (18) months after the Effective Date		
	Exit Plan & Appointment of Exit Manager (Schedule 6.4 (Exit Management))	Three (3) months after the Effective Date			
	BCDR Plan (Schedule 6.5 (Business Continuity and Disaster Recovery Provisions))	Three (3) months after the Effective Date			
	Quality Plans to be developed (Schedule 6	Twenty (20) Working			

	(Standards) of the Framework Agreement)	Days before [first] Operational Service Commencement Date				
	Operational Service Commencement Date(s)	-				
	Contract Performance Point(s)	-				
	Independent certification of the ISMS to ISO/IEC 27001 (Schedule 2.2 (Security Requirements and Plan))	Twelve (12) months after the Effective Date				

APPENDIX 9

TESTING PROCEDURES

The Parties shall work together to agree the Testing Procedures within 30 Working Days from the Effective Date.

1   TEST SUCCESS CRITERIA

In accordance with Paragraph 6.1 of Schedule 4.2 (Testing Procedures) of the Call-Off Terms, the following Test Success Criteria shall apply:

Service	Pre-conditions	Test Success Criteria

2   TEST ISSUES

2.1   In accordance with Paragraph 9.1 of Schedule 4.2 (Testing Procedures) of the Call-Off Terms, the following Test Issue criteria shall apply:

2.2   For the purposes of the definition of Material Test Issue set out in Schedule 1 (Definitions) of the Call-Off Terms, the severity levels are:

APPENDIX 10

CHARGING AND INVOICING

The Parties shall work together to agree the key Milestone dates and draft plan within 30 Working Days from the Effective Date.

1 MILESTONE PAYMENTS

In accordance with Paragraph 2.1 of Part A of Schedule 5.1 (Charges and Invoicing) of the Call-Off Terms, the following Milestone Payments shall apply: **[Parties to complete]**

Milestone Number	Milestone Description	Amount of Charge (£)
1	Detailed design signed off by CQC	£20,102.14 (20% of total)
2	Build phase completed	£35,178.75 (35% of total)
3	Rollout accepted as operational by CQC	£35,178.75 (35% of total)
4	Transition closed	£10,051.07 (10% of total)
Total		£100,510.71

2 SERVICE CHARGES

In accordance with Paragraph 3.1 of Part A of Schedule 5.1 (Charges and Invoicing) of the Call-Off Terms, the following Service Charges shall apply:

Service Management Charges

Service Management: Contact Centre			
Vodafone Resource	Quantity	Unit Monthly Charge	Total Monthly Charge
Enhanced Service Management	1	£5,119.05	£5,119.05

Storm Contact Centre Charges

Storm Contact Centre (for usage charges please refer to base case financial model)	Quantity	Unit Monthly Charge	Total Monthly Charge
storm CONTACT Voice Concurrent Licence	~~110~~	~~£65.00~~	~~£7,150.00~~
storm CONTACT Email Licence	~~58~~	~~£12.00~~	~~£696.00~~
storm CONTACT SOCIAL Licence	~~10~~	~~£24.00~~	~~£240.00~~
storm CONTACT Supervisor Licence	~~4~~	~~£80.00~~	~~£320.00~~
storm CONTACT Administrator Licence	~~1~~	~~£600.00~~	~~£600.00~~
storm VIEW Historical and Real Time Reporting	~~1~~	~~£450.00~~	~~£450.00~~
storm FLOW IVR Builder Tool	~~1~~	~~£600.00~~	~~£600.00~~
storm RECORDER Manager Licence	~~5~~	~~£20.00~~	~~£100.00~~
Teleopti User licence	~~100~~	~~£32.00~~	~~£3,200.00~~
Security Token Rental (for admin access)	~~5~~	~~£6.25~~	~~£31.25~~

For Storm Contact usage charges please refer to base case financial model as detailed with Appendix D, Annex 1

Total Contract Values

Service Description	Year 1	Year 2	Total Contract Value
Non Recurring Charges	~~£100,510.71~~	~~£0.00~~	~~£100,510.71~~
Service Management Charges Contact Centre	~~£61,428.60~~	~~£61,428.60~~	~~£122,857.20~~
Storm Contact Centre Charges	~~£160,647.00~~	~~£160,647.00~~	~~£321,294.00~~
Totals (NETT)	~~£222,586.31~~	~~£222,075.60~~	£544,661.91

Usage charges are excluded. Please refer to base case financial model as detailed within Appendix 10, Annex 1

3 EXPENSES

In accordance with Paragraph 3.5 of Part A of Schedule 5.1 (Charges and Invoicing) of the Call-Off Terms, the Customer Authority shall pay the following categories of expenses incurred by the Contractor during the course of performing the Services: **N/A**

4   DELAY PAYMENTS

In accordance with Paragraph 5 of Part A of Schedule 5.1 (Charges and Invoicing) of the Call-Off Terms,] the following Delay Payments shall apply: **N/A**

MILESTONE NUMBER	DELAY PAYMENT
N/A	

5   BASE CASE FINANCIAL MODEL

The proforma Base Case Financial Model is as attached in Appendix 10 - Annex 1 – Base Case Financial Model.

6   SUPPORTING DOCUMENTATION

In accordance with Paragraph 2.6 of Part B of Schedule 5.1 (Charges and Invoicing) of the Call-Off Terms, the address to which all invoices and Supporting Documentation shall be sent is as follows:

Invoice Address
CARE QUALITY COMMISSION
T70 PAYABLES F175
PHOENIX HOUSE
TOPCLIFFE LANE
WAKEFIELD
WF3 1WE

Supporting Documentation

To be produced at contract management meetings

Inbound Voice Rate Card (traffic routed via Storm Platform)

Call description	price structure	type of price	pence per call price
Call Recording Charge	pence per minute	charge	
Call Recording Storage Charge	per hour per month	charge	
Freephone fixed originated	pence per minute	charge	
Freephone mobile originated	pence per minute	charge	
Freephone payphone originated	pence per minute	charge	
05 Freephone	pence per minute	charge	
03	pence per minute	charge	
Virtual Geographic	pence per minute	charge	
0 ppm Service charge	pence per minute	charge	
1 ppm Service charge	pence per minute	revenue share	
2 ppm Service charge	pence per minute	revenue share	
3 ppm Service charge	pence per minute	revenue share	
4 ppm Service charge	pence per minute	revenue share	
5 ppm Service charge	pence per minute	revenue share	
6 ppm Service charge	pence per minute	revenue share	
7 ppm Service charge	pence per minute	revenue share	
8 ppm Service charge	pence per minute	revenue share	
9 ppm Service charge	pence per minute	revenue share	
10 ppm Service charge	pence per minute	revenue share	
11 ppm Service charge	pence per minute	revenue share	
12 ppm Service charge	pence per minute	revenue share	
13 ppm Service charge	pence per minute	revenue share	
15 ppm Service charge	pence per minute	revenue share	
20 ppm Service charge	pence per minute	revenue share	
25 ppm Service charge	pence per minute	revenue share	
30 ppm Service charge	pence per minute	revenue share	

35 ppm Service charge	pence per minute	revenue share
36 ppm Service charge	pence per minute	revenue share
40 ppm Service charge	pence per minute	revenue share
45 ppm Service charge	pence per minute	revenue share
46 ppm Service charge	pence per minute	revenue share
50 ppm Service charge	pence per minute	revenue share
55 ppm Service charge	pence per minute	revenue share
60 ppm Service charge	pence per minute	revenue share
65 ppm Service charge	pence per minute	revenue share
70 ppm Service charge	pence per minute	revenue share
75 ppm Service charge	pence per minute	revenue share
80 ppm Service charge	pence per minute	revenue share
90 ppm Service charge	pence per minute	revenue share
95 ppm Service charge	pence per minute	revenue share
99 ppm Service charge	pence per minute	revenue share
100 ppm Service charge	pence per minute	revenue share
110 ppm Service charge	pence per minute	revenue share
120 ppm Service charge	pence per minute	revenue share
145 ppm Service charge	pence per minute	revenue share
150 ppm Service charge	pence per minute	revenue share
155 ppm Service charge	pence per minute	revenue share
180 ppm Service charge	pence per minute	revenue share
200 ppm Service charge	pence per minute	revenue share
220 ppm Service charge	pence per minute	revenue share
250 ppm Service charge	pence per minute	revenue share

300 ppm Service charge	pence per minute	revenue share	
360 ppm Service charge	pence per minute	revenue share	
5 pence per call Service charge	pence per call	revenue share	
10 pence per call Service charge	pence per call	revenue share	
15 pence per call Service charge	pence per call	revenue share	
25 pence per call Service charge	pence per call	revenue share	
30 pence per call Service charge	pence per call	revenue share	
35 pence per call Service charge	pence per call	revenue share	
40 pence per call Service charge	pence per call	revenue share	
48 pence per call Service charge	pence per call	revenue share	
50 pence per call Service charge	pence per call	revenue share	
70 pence per call Service charge	pence per call	revenue share	
75 pence per call Service charge	pence per call	revenue share	
100 pence per call Service charge	pence per call	revenue share	
145 pence per call Service charge	pence per call	revenue share	
150 pence per call Service charge	pence per call	revenue share	
200 pence per call Service charge	pence per call	revenue share	
250 pence per call Service charge	pence per call	revenue share	
300 pence per call Service charge	pence per call	revenue share	
400 pence per call Service charge	pence per call	revenue share	
500 pence per call Service charge	pence per call	revenue share	
600 pence per call Service charge	pence per call	revenue share	
77 ppc + 155 ppm Service charge	pence per call & pence per minute	revenue share	
80 ppc + 25 ppm Service charge	pence per call & pence per minute	revenue share	
399 ppc + 139 ppm Service charge	pence per call & pence per minute	revenue share	

499 ppc + 135 ppm Service charge	pence per call & pence per minute	revenue share	
250 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
5 ppc + 5 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
10 ppc + 10 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
40 ppc + 40 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
70 ppc + 70 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
150 ppc + 150 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
200 ppc + 200 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
445 ppc + 257 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
550 ppc + 275 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
574 ppc + 299 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	
698 ppc + 349 ppm Service charge	pence per call & pence per minute after 60 seconds	revenue share	

pence per minute price	pence per call price post levy	pence per minute price post levy

per hour per month

109.15	410.01	108.50		
203.48		202.26		
1.82	1.82	1.82		
5.98	5.95	5.95		
30.98	30.80	30.80		
55.73	55.40	55.40		
121.65	120.92	120.92		
162.32	161.35	161.35		
209.82	364.28	208.56		
223.82	450.26	222.48		
243.82	470.14	242.36		
285.48	572.86	283.77		

Transition Support: Contact Centre (Non-Recurring)			
Vodafone Resource	Days	Day Rate	Total Charge
not required			
not required			
not required			
not required			
Total	0		£0.00

Professional Services: Contact Centre (Non-Recurring)			
Vodafone Resource	Days	Day Rate	Total Charge
Customer Project Manager	▇▇▇▇▇		£25,635.71
Total	▇▇		£25,635.71

APPENDIX 11

BENCHMARKING

1. APPOINTMENT OF BENCHMARKER

In accordance with Paragraph 4.1 of Schedule 5.3 (Benchmarking) of the Call-Off Terms, the following organisations may be appointed to carry out a Benchmark Review:

Organisations Name	Address
N/A	N/A

2. GOOD VALUE

N/A.

APPENDIX 12

GOVERNANCE

The Parties shall agree and provide the Governance contacts as required below within 30 Working Days from the Effective Date.

In accordance with Paragraph 3.1 of Schedule 6.1 (Governance) of the Call-Off Terms, the following Board structures and representations shall apply:

Services Board -

Customer Authority Board Members (together with responsibilities)	[TBC] Chairperson Customer Authority Representative
Contractor Board Members (together with responsibilities)	Contractor Representative
Date, time and location of the first Services Board meeting	[At such location and time (within normal business hours) as the Customer Authority Representative shall reasonably require unless otherwise agreed in advance in writing]
Frequency of subsequent Services Board meetings	Monthly
Date, time and location of subsequent Services Board meetings	To be agreed at the previous Services Board meeting]

Contractor Board

Customer Authority Board Members (together with responsibilities)	[TBC] Chairperson
Contractor Board Members (together with responsibilities)	TBC

Start Date for Contractor Board meetings	TBC
Frequency of Contractor Board meetings	TBC
Location of Contractor Board meetings	TBC

APPENDIX 13

BCDR PLAN

The Contractor will comply with the requirements of Schedule 6.5 of the Call-Off Terms. A draft BCDR plan will be produced by the Contractor within three months after the Commencement Date and will be reviewed and agreed with the Customer Authority.

APPENDIX 14

SUSTAINABILTY PLAN

The Contractor commits to providing a fully developed Sustainable Development Policy Statement to the Customer Authority within three months of the Effective Date.

APPENDIX 15

TUPE AND PENSIONS

In accordance with Paragraph 2.1 of Schedule 7.1 (Staff Transfer), the following Parts apply:

N/A

APPENDIX 16

SPECIAL TERMS

N/A

SIGNED by or on behalf of the Parties on the date set out above:

For and on behalf of the Customer Authority: Care Quality Commission

Name and Title	
Signature	
Date	

For and on behalf of the Contractor: Vodafone Ltd

Name and Title	
Signature	
Date	

For and on behalf of the Contractor:

Name and Title	
Signature	
Date	

ANNEX 1

BASE CASE FINANCIAL MODEL

Lot 2 Contact Centre
22 5 15.xlsx

APPENDIX 11

BENCHMARKING

1. APPOINTMENT OF BENCHMARKER

In accordance with Paragraph 4.1 of Schedule 5.3 (Benchmarking) of the Call-Off Terms, the following organisations may be appointed to carry out a Benchmark Review:

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2. GOOD VALUE

N/A.

APPENDIX 12

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The Parties shall agree and provide the Governance contacts as required below within 30 Working Days from the Effective Date.

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Services Board -

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Frequency of subsequent Services Board meetings	Monthly
Date, time and location of subsequent Services Board meetings	To be agreed at the previous Services Board meeting]

Contractor Board

Customer Authority Board Members (together with responsibilities)	[TBC] Chairperson
Contractor Board Members (together with responsibilities)	TBC

Start Date for Contractor Board meetings	TBC
Frequency of Contractor Board meetings	TBC
Location of Contractor Board meetings	TBC

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The Contractor will comply with the requirements of Schedule 6.5 of the Call-Off Terms. A draft BCDR plan will be produced by the Contractor within three months after the Commencement Date and will be reviewed and agreed with the Customer Authority.

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In accordance with Paragraph 2.1 of Schedule 7.1 (Staff Transfer), the following Parts apply:

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APPENDIX 16

SPECIAL TERMS

N/A

SIGNED by or on behalf of the Parties on the date set out above:

For and on behalf of the Customer Authority: Care Quality Commission

Name and Title	
Signature	
Date	

For and on behalf of the Contractor: Vodafone Ltd

Name and Title	
Signature	DocuSigned by:
Date	

For and on behalf of the Contractor:

Name and Title	
Signature	
Date	