<Name Participant>

<name of participant’s project>

<Name of Participant’s organization> +
<company logo>

EXECUTIVE SUMMARY

< Use this section to summarise the case you are submitting.

In the case of a project, this will probably entail:

- *a short description of the overall purpose of the project*
- *a short description of the concrete change that the project will bring about*
- *a view on the financials, by summarising the business case highlights*
- *some degree of project planning, focusing mainly on delivery date(s).*

In the case of a study paper, this section should summarise the approach, the main findings and especially highlight the conclusions reached.

Tips:

- *In everything that follows, use this template as a guide, but please use your own judgment in following its structure, and/or reusing its content suggestions. Feel free to skip certain passages, when you deem them irrelevant. After all, this is your case. You should feel comfortable with it*
- *When leaving out things on purpose, it is safer to explicitly mention "not applicable" than to leave the Jury guessing on whether it was just an oversight.*
- *Use as much as possible the approach/methodology of your own company, especially when you're working on a "real project". This might save you rework in real life. Dare however to criticize it, if ever the expert class has given you insights to challenge your organisation's approach. Remember, this management class remains a "safe" environment*
- *Make sure the Jury understands you !*

As you will notice, this template is mainly written from the perspective of a "project", which will be the majority of the cases presented (and has certainly been so in the previous editions).

When, in agreement with the program management, you develop something different (e.g. a paper), you will have some more design-work to do.>

1. Situation

<Use this section to situate the case you are submitting. Shortly describe your company, what it does and what it stands for, as a general reference frame for what will follow. Situate the role and position of the contact center in the organisation, and give some idea of its size and volume.
When relevant for your case, include some history and recent evolutions that might have contributed to the business challenge you will solve
Tips:

- *Write this document towards a Jury audience that does not necessarily know your company and its organizational structure*
- *This is a factual description, not intended to generate controversy*
- *As this section mainly serves as an introduction, and a general framework, it should not be the bulk of your document. And even less of your presentation*
- *Refer to CCOM parts "vision/mission", and ""function, synergies, channel mix". Review your course material on "vision, mission, strategy"*
- *You can start developing this part of your case very early on.*

>

2. Complication

<Use this section to explain why the status quo is not an option. What are the shortcomings of the situation you have just described? Why can't things stay as they are? What are the changes in the company context (internal/external) that force things to evolve?
Tips:

- *This is probably a place to refer to the objectives and KPI's of the company and/or the contact center*
- *Refer to CCOM parts "deployment" and "objectives". Actively use elements from "business activity monitoring". Review your course material on "vision, mission, strategy" and on "set-up, deployment"*
- *The Jury would definitely expect the "customer" to be an explicit part of the reasoning >*

3. Question

<Use this section to distill from section 2 a clear business question, which you will answer in your project. What is the business reason behind your case, preferably formulated as a simple, gripping question? When writing a paper, this section should describe the hypothesis you will be testing
Tips:

- *The question you mention here, is the one that your project should answer. Use it as your "end in mind", when beginning. When there is no match, review either one.*
- *When your projects describes the execution of something that was already decided (eg.* "we will build a contact center"*), please take the trouble to restate the original purpose (eg.* "why was the decision taken to build a contact center"*, in stead of referring to* "we need to implement an executive decision"*>*

4. Project description

<Use this section to describe your project. What exactly is the change you will bring about by doing what exactly?
Tip:

- *This is where you start getting concrete. Vagueness (inherent to previous sections) stops here.*
- *As this is the answer to the question, formulated in section 3, there should be an exhaustive coverage of that question, and it should be rather self-evident to understand. "Yep, this is the way to fix it", is the reaction you're after*
- *If there is a chance of expectations being too high –for instance elements you have put out of scope that others could be expecting – make sure you manage those expectations. Early on, so here is a good place to start. Explain why, but only briefly.*
- *Review course material of the modules under "Deliver Value" to get inspired>*

5. Objectives

5.1. Project Objectives

<use this section to indicate exactly what the objectives of the project are. What exactly will you achieve? Make sure these are the elements by which "success" of your project can and will be measured.
This section should normally be an elaboration of what you mentioned under sections 3 and 4. If you feel you described enough there, feel free to skip this part
Tips:

- *One would expect a clear contact center angle here. The expectation is that participants bring a topic, that is closely linked to contact center management, and allows the demonstration of having mastered the course's content.*
- *When your project focuses on the contact center impact of a larger organizational change (eg.* Fusion*), be wise to delimit the scope.*
- *Review course material on "Set-up, deployment" and "deliver value" >*

5.2. Contribution to <*your company*> strategy

<use this section to reflect explicitly on how this project will contribute to the overall strategy and performance of your company. Don't forget the level of people likely to have to decide on go/no go of your project... Make sure you explain how it fits their targets.
Tips:

- *Refer to the section on "complication". Again, your project is supposed to bring at least part of the answer(s)*
- *There should be a link with the way the contact center is deployed within the organization. Refer to the sections "function", "synergies", channel mix" in the Operating Model. Review the corresponding course material*
- *Refer to "Deliver value" reflections from the Operating Model, to categorise and quantify*
- *Claims you make here should normally reflect in the business case (eg. when mentioning you contribute to lean processes, there is probably an FTE gain to be found>*

5.3. Impact from a Customer perspective

<use this section to reflect on how this project will impact (positively/negatively) customer(s).
Tips:

- *Consider both internal and external customers. There must be a Customer somewhere !*
- *Try to describe the impact on customer experience as lively as possible, and stay away from vagueness (eg not simply "higher satisfaction"). Especially if this were to be a part you recover in the ppt presentation, there must be ways to make this dynamic*
- *What you put down here, can not remain "soft". Translate the improved customer experience into tangible benefits in the business case >*

5.4. Project scope.

<Use this section to describe the scope of your project. Make explicit what is in/out, in terms of

- *functions and profiles* *(ex.* Only front office*)*
- *entities and localizations* *(ex.* Only sales call center in Mons*)*
- *activities* *(ex.* Only outbound calling*)*

Make sure you give some kind of quantification (# of FTE ,% of revenue or costs impacted, …)
This section allows the reader to get a better grip on

- *feasibility and complexity of the project. A fundamental change with a very large scope requires different kinds of attention than a minor change in modus operandus. Possible complexity might trigger you do propose a phased approach, with pilots*
- *the business case, as the merits of the project can be compared to the overall context (remember the saying that it's "hard to make pound savings on a penny business")*

Tips:

- *When delimiting the scope in terms of activities, give some indication of the relative importance of the "in scope" part.*
- *Double check that you did not address a very global complication by working only on a micro-part. Rephrase your problem statement if needed*
- *The "out –of-scope" part might be an input for "interdependencies" and "risk analysis"*
- *Double check with the CCOM. If you find you're only describing a microscopical part, and using only fragments of the model, you might want to rethink your choice of case. After all, you're supposed to demonstrate having mastered the entire course. >*

6. TO BE versus AS IS processes

6.1. Assumptions

<If relevant, use this section to document assumptions underlying your project and business case. If for instance, your project presumes other work to have been completed, please indicate so (ex: if you're merging contact centers, you might want to assume that the overall merger at company level has been agreed upon, and that HR implications have been negociated company-wide, so you won't cover it here*).*

If part of your implementation depends on parallel tracks, that you are not including in your scope, make sure to mention this here (ex.: you're implementing contact center software, but as part of an overall upgrade of the ICT systems – you assume the overall work is done and funded)

Tips:

- *These assumptions are important, not only to allow management to do some probability check, but also to judge the credibility of the business case.*
- *When you document assumptions, it might be useful to refer back to them when describing interdependencies and risks later on*
- *When spontaneously you can't think of anything to put here, skip the whole passage.>*

6.2. TO BE versus AS IS

<Use this section to describe how you project impacts the way Operations are run
Indicate the "as is" towards "to be" transition on primary processes (service delivery, coaching), but don't forget to assess the impact on secondary processes (resources, information, systems). If your project is mainly focused on secondary processes (eg. WFM-tool introduction), certainly don't forget to do the backward reasoning and assess impact on primary processes.

Double back to the "complication" and "project objectives"you wrote earlier. Make sure you check (for yourself) that you have covered all grounds, and make sure to indicate (for your reading audience) how this all maps to the original issue.

Tips:

- ***LET THE CONTACT CENTER OPERATING MODEL BE YOUR GUIDE !***
- *When certain elements are not relevant, just say so*
- *start from functional changes first. Get technical –if needed- later. Even if tools are involved, don't make this an IT project only*
- *Remember that although jury may be contact center experts, the "normal" target audience of a charter like this one might not be. Avoid jargon. Explain*
- *When appropriate, use flowcharts to make your point. The assignment however is not to write a full process manual of your company, so limit yourself to level 0 or 1*
- *Review course material on "organize and document*
- *Review course material on modules "deliver value", "primary processes" and "secondary processes">*

6.4. Identification of relevant KPI's & targets upon project implementation.

<Use this section to describe here how "success" of the project will be measured, by identifying the targets for business performance indicators.
Of course these will have to be linked to the project objectives (collectively exhaustive). Make sure you mention here the business results (ex. Increased sales, reduced nr of FTE, increases satisfaction scores, .*), not the projectmanagement KPI's. Of course you will have to come in on time and within budget, but that is not what is meant here.*

Tips:

- *When discussing a multi-year project, or one that is phased in its approach, it might be a good idea to set intermediate targets*
- *You might use a kind of table like the one below*

#	Project KPI's – Process	Total Target	Due Date
01			
02			
03			
…			

- *Review course material on Business Activity Monitoring>*

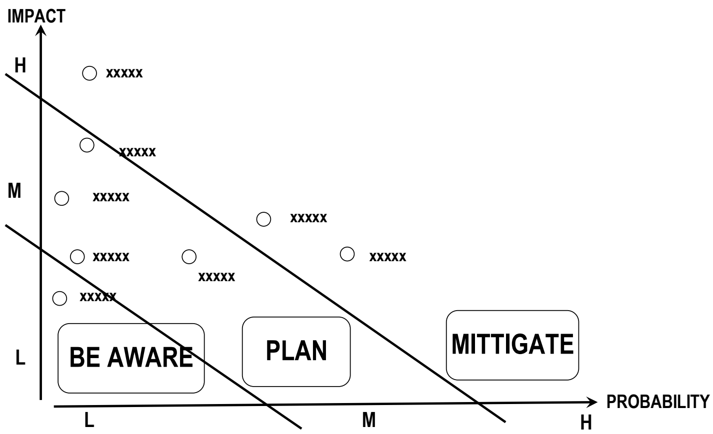
6.5. Key Risk(s) and Control identification

<Use this section to reflect on the risks associated with your project. What are the events that might prevent your project from succeeding? How bad would the impact be? How likely is it that it will occur? And, most importantly, what is your plan to either prevent risks from materializing, or to manage the situation if they do.
The more you think this through, the more credible your project becomes (next to just ensuring a better project management).
Tips:

- *Especially review the "secondary processes" part, as very often implementation tracks suffer from lack of attention there*
- *Manage your own tendency to only look at the outside world to identify risks.*
- *When counting on some one else to manage your risk, make sure to mention it in the interdependencies*

Feel free to use either of the following presentation means, or your own internal company scheme

#	Risk Description	Risk owner	Causes	Effects description	Impact	Probability	Mitigation Action	Contingency plan
1	*What can happen ?*	*Whose job is it to prevent/avoid*	*Why would this happen ?*	*If it happens, how does it impact the results of your project ?*	*Either quantify, or use H/M/L*	*Best to use H/M/L*	*What will have to be done to avoid the risk*	*How will we manage, if the avoidance fails? What is the plan B*



6.6. Alternatives considered

<Use this section to –very briefly- describe alternatives you have considered as answers to the business question. It will put management's mind at ease, knowing that your proposal is not just a whim, but the result of a founded reasoning
Indicate:

- *what alternatives were considered. Remember there is always at least one, namely '"do nothing"*
- *on what basis was the decision made to go for this one. This should probably link in with the company's overall strategic KPI's*
- *what would be the consequence of not doing project, not doing it entirely or not doing it now.>*

6.7. Interdependencies

<Use this section to describe the interdendencies of your project:

- *what do you need from whom ?*
- *what will impact be of your project on others ?*

This will force you to carefully think about the positioning of your contact center, both in terms of organizational structure and in terms of end-to-end service delivery. Where do you fit in, and what does this mean
Interdependencies can be of
- *other projects*
- *other entities within the organization*

Tips:
- *In real life, it is probably good to indicate who (from other entities) validated the impact of your project. This will demonstrate towards decision-makers that you not only covered it, but also obtained some degree of buy-in from the others?*
- *Especially consider so-called support divisions in your organization. When a project impacts contact center employees, HR (and possibly Labor Relations are likely to be involved*
- *Review course material on "function" and "synergies" >*

7. Project planning

7.1. Phasing, milestones and deliverables

<Use this section to indicate the project plan, including the intermediate deadlines/milestones.
Tips:

- *Remain fairly high level, but make sure you cover all the bases. Use the Operating Model as a checklist*
- *Double check with your projected scope, as to remain realistic*
- *Take external context into account when determining timelines. Depending on the situation/context of your organization you might need to trade off "fast and good" vs "perfect but slower"*
- *Make sure that "communication" is an explicite track in your project.>*

Month	Description of milestone(s) / deliverable(s)	Planned date
PHASE 1		
Milestone/ Del. 1		
Milestone/ Del. 2		
PHASE 2		
Milestone/ Del. 1		
Milestone/ Del. 2		

7.2. Multiyear roll-out

<Use this section whenever your project covers more than 1 (accounting) period. Indicate to what extent a "go" now would also mean long(er) term commitments. This will be a factor influencing investment decision, so you might as well show it upfront. When your project is based on a pilot approach, make sure to distinguish "pilot costs" from "roll out" >

7.3. Project resources

<Use this section to describe the resources you will want to assign to your project, and the work you expect others to pick up. This should describe internal and external project management resources, and other internal business resources
Tips:
- *For your ECCM assignment, it is less important to nominatively identify resources, than it is to indicate what functions (who, where) you will involve. This can allow Jury to assess whether you covered all bases. In real life, you might want to go to the level of nominative detail. And get some upfront validation of availability*
- *In real life, this exercise will help you determine whether internal absorption capacity is large enough to conduct the project*
- *You need to know how the costs of those internal resources are to be factored in into the business case (eg Training costs)>*

8. Business Case

8.1 Business Case

<Use this section to present the highlights of and reasoning behind your business case. The detailed calculation as such is expected in a separate excel sheet, which will be thoroughly reviewed by the Jury.
Use your company's own approach if it has one, especially if the case your are presenting is a real project you are currently working on. Otherwise, use the template ECCM provides you with

In your business case, you will probably make a distinction between:
Cash out

- *CAPEX: capital expenditure: investments, against which there will be a yearly write off. Categorising might be linked to nature of the investment, or the amount involved*
- *OPEX: operational expenses : one shot expenses. Usually, consultancy fees fall under this category*
- *IT mandays/budget:*
    - *Development costs associated with your project*
    - *Usually associated with maintenance costs (as a % of the original) in later years*
- *Training costs: use internal guidelines to see whether training days are factored in a rato of daily salary of employees*
- *FTE costs*

Gain

- *Revenue. Use internal rules to decide whether this has to be "additional" (revenue your company did not have before) versus "protected" (revenue you have but might have lost if you did not do anything). This might for instance be an important topic when you're describing sales efforts by a contact center. Is it new sales, or a channel shift ?*
    - *This might force you to make assumptions about how "soft benefits" (ex. "higher quality", "higher satisfaction") translate into hard Euro's*
- *FTE savings: again use internal guidelines how you can describe these savings (with/without dismissal ? avoided FTE cost vs real savings ?)*
- *Opex reduction*

Tips:

- *Review course material "business planning & budget"*
- *Paste the summary of your excel sheet in the word document. No project charter is complete without the financials*
- *The reasoning behind your business case build up might be more important than the actual numbers you fill it with.*
- *When the outcome in your eyes is simply too good to be true, please review. You're probably right*
- *In the case you submit for the expert class, the business case is important. In real life it is crucial*

8.2 Sensitivity analysis – worst case scenario

<Use this section to play around with the assumptions underlying your business case. What if some of these assumptions change? How dependent is your business case from certain parameters staying well within certain limits? What if all goes wrong: what is the worst case scenario (might indicate to what extent your project is a "no regret move", or a liability>