

In addition to our industry and customer service experience, we have integration experience with all major call center vendors that could be applicable to the project.

- Alcatel
- Ariba
- Aspect
- Answersoft
- Aurum
- BroadVision
- Clarify
- CommerceOne
- Concentra
- Dialogic
- Digital
- Davox
- Early Cloud
- Ericsson
- Filenet
- Genesys
- Geotel
- Hewlett-Packard
- IBM**
- Inference
- Informix
- InterVoice**
- Lotus
- Lucent**
- Melita
- Microsoft
- Mosaix
- Quintus-Nabnasset
- NetDynamics
- Netscape**
- Nice Systems
- Nortel**
- Onyx
- Open Market
- Oracle
- PeopleSoft
- Periphonics
- Primus
- Remedy
- Rockwell
- Scopus
- Siebel
- Siemens/RoIm**
- Sun Microsystems
- Sybase
- TALX
- TCS
- Teloquent
- Trilogy
- Vantive
- Voicetek



Our Business Integration Partner (BIP) Program allows us to provide you with discounts on hardware and software expenditures required by the project, leveraging Andersen Consulting's \$1 billion annual technology spend.

- Anticipated hardware/software spends for AWW call center buildout:
  - Hardware ..... } \$3,000,000
  - Software ..... } 500,000
  - Workstations (lease or on-going annual cost) ..... } \$3,500,000
  
- Potential savings (based on Andersen Consulting BIP experience) \$250 - 500,000



- Our Understanding of Your Needs
- The Business Case & Vision
- Project Approach & Team
- Pricing to Achieve Benefits Realization
- Why Andersen Consulting?
- **Appendix**
  - Project Team Resumés
  - Credentials
  - Task Description and Workplan



**Mark Hawn**

**Background**

Mark Hawn is a Partner in Andersen Consulting's Resources Practice, which focuses on the Chemicals, Energy, Utilities, and Natural Resources market sector. Mr. Hawn has approximately 15 years of experience with Andersen Consulting. Mr. Hawn has responsibility for our U.S. Customer Service Improvement practice. Mr. Hawn has a BS in Business Administration from the University of North Carolina at Chapel Hill.

**Representative Client List**

- Duke Energy
- Florida Power & Light
- Federal Energy Regulatory Commission
- Carolina Power & Light Company
- SEEBORD
- Entergy
- CPFL
- Marriott Corporation
- Sprint
- MCI
- NationsBank

**Functional Expertise**

- Customer Service
- Strategic Planning
- Change Management
- Organization Design and Development
- Call Center Consolidation
- Engineering and Operations

**Relevant Experience**

- American Water Works - Partner responsible for developing Consolidated Call Center business case
- Carolina Power & Light Company - Customer Service Center Consolidation: Responsible for a project to consolidate and reengineer all of the customer service processes around a customer service center concept. The project was responsible for consolidation of over fifty customer field offices, identification and development of a building site, evaluation and selection of customer service representatives, reengineering and development of new customer service processes, and implementation of a client-server based customer response system. The project team totaled approximately forty people. Mr. Hawn focused on the overall direction of the project, change management, organizational design and employee selection, and performance measures development
- Florida Power & Light Company - Customer Call Center Consolidation: Advisor to a project which is reengineering call center processes and consolidating distributed call centers. The scope of Mr. Hawn's work includes organization design, employee selection and recruiting, design and implementation planning, and change management
- Cia Paulista Forca Electrica (CPFL) - Partner responsible for the overall quality of our assessment of cost reduction opportunities (including call center) for a recently privatized distribution company in Brazil. The team identified over \$100 million in net savings opportunities. The project also addressed several major organizational change issues such as implementation of asset management principles and organization components
- Duke Energy - Lead Partner for a project that assessed the overall organization performance of the call center. The project assessed current performance measures and capabilities and designed and implemented solutions related to technology, business processes and human performance. Duke Energy's call center has been rated number one in customer service for US utilities
- Pennsylvania Power & Light Company - Partner responsible for the improvement of the call center for an organization going through deregulation. Andersen Consulting was compensated based on investment levels achieved



**Ross Rhodes**

Background

Mr. Rhodes is an Experienced Manager within the Andersen Consulting Utilities Operation Group. His strengths are in reengineering customer focused processes and program management. He brings a strong background combining business process, technology, and communications to all engagements. Ross' process creation spans Marketing and Sales, Order Fulfillment and Delivery, Billing and Collections. Ross has 7 years of consulting experience and an additional 6 years of direct utility experience. He is a graduate from Electronic Data Systems (EDS) "Systems Engineering Program" and has a BS in Business Administration from the University of South Florida in Tampa.

Representative Client List

- Carolina Power & Light
- Niagara Mohawk Power Corporation
- Philadelphia Electric Company
- Enron Energy Services
- Electronic Data Systems

Functional Expertise

- Customer Service
- Call Center Strategy
- Call Center Operations
- Facility Management
- Call Center Build-out

Relevant Experience

- American Water Works - Developed consolidated call center business case
- Carolina Power & Light - Led multiple teams in the design of a 250 seat call center. The center combined over 50 call services offices into one for handling all call types for CP&L. All new processes, technology and people were deployed as part of this effort
- Niagara Mohawk Power Corporation - Managed a cross functional team of call center and field personnel in the development of a new Call Center Operational Model. The project consisted of a current assessment, best practices and benchmarking study, identification of quick wins and the development of the future operational model. The approach of the team utilized the Business Integration Model focusing on the Call Center Strategy, People, Process and Technology
- Philadelphia Electric Company - Led the Retail Team in the development of their business strategy. This included an assessment of capabilities, pricing alternatives and competitive intelligence that led to the development of their current operating vision and implementation of over twenty initiatives
- Enron Energy Services - Led a cross functional team in the development of their Customer Relationship Management (CRM) business case and design. This included defining the marketing, sales and customer service operations and automation
- Miscellaneous - Continue to provide advice to multiple clients. Boston Gas, Colonial Gas, Brooklyn Union, Louisville Gas & Electric & Kentucky Utilities on call center consolidation, marketing and sales operations and automation, and data warehousing
- Carolina Power & Light, Director of Marketing & Sales Information - Was responsible for providing information systems to enable the marketing and sales processes. Systems included a Marketing Data Warehouse, Sales Force Automation, Market Planning and Product Development and a Telemarketing System



**Hector Hernandez**

**Background**

Mr. Hernandez, Manager and Technical Architect within the call center / Network Solutions practice of Andersen Consulting, joined Andersen Consulting with 10 years experience in customer services: technical architecture, solutions and business processes. Hector has a BBA from Georgia State University--majoring in Management & Information Systems

**Representative Client List**

- Andersen Consulting CIO Organization (AC)
- CSX Transportation (MCI Systemhouse, Inc.)
- UNOCAL Inc (MCI Systemhouse, Inc.)
- United States Automobile Association (MCI Systemhouse, Inc.)
- AMVESCO (MCI Systemhouse, Inc.)

**Functional Expertise**

- Customer Service
- Call Center Technical Architecture
- Call Center Strategy
- Call Center Operations

**Relevant Experience**

- Developed consolidated call center business case for American Water Works
- Responsible for the overall design and implementation of a new Global Integrated Voice Network. The program's main objective was to design, build and transition the Client's 200+ world-wide offices and 65,000 employees to a new Global Voice Network
- Project Manager over team of call center architects and software developers responsible for the planning, design and implementation of a new call center technical infrastructure
- Project Manager responsible for redesigning the existing Call Center processes and workflow. This included managing the design and implementation of the Genesys CTI screen pop application
- Managed the Call Center voice, client/server networking and Technical Support services for the Client's Risk Management Division which consisted of 1,200 plus end users in 28 offices nationwide
- Managed and designed the consolidation and relocation of two large data centers, which supported 1,200 plus users nationwide, into one integrated center on time and within budget
- Responsible for managing the technical support team that supported high volume (50,000,000 minutes annually Inbound/Outbound) collections and telemarketing call center



**Michael Joseph**

**Background**

As a Manager, specializing in Human Capital Design and Development for Andersen Consulting, Mr. Joseph has several years of call center organizational and technical experience, with an expertise in Customer Relationship Management. Michael has a BBA from Baylor University, majoring in Quantitative Business Analysis.

**Representative Client List**

- Bank of America
- Fleet Mortgage Group
- Conoco
- BlueCross BlueShield

**Functional Expertise**

- Call Center
- Customer Relationship
- Problem Solving - Customer impacts resulting from Technical Options or Decisions
- Implementation Planning

**Relevant Experience**

- Supported development of consolidated call center business case for American Water Works
- As Implementation Manager on a project to standardize call center systems that included a call center build out responsibilities included developing an implementation approach, identifying impacts to existing call center due to new technology/increased functionality (Windows, CTI, Siebel Fulfillment System) and identifying customer impacts of the data conversion
- Supervised a team responsible for developing appropriate training curricula and scheduling and tracking training classes for Telephone and Fulfillment Call Center Agents on a project that involved implementing a common systems platform in a new call center relating to an acquisition
- Team Lead responsible for the design and development of the organization, teams and jobs in the Client's On-line Banking Center (OBC). This included designing jobs around new functionality of Web release, create job descriptions, skill inventories and interview packets and designing and validating Team structure of the OBC



**Christa Dell**

Background

As a Consultant for Andersen Consulting, Ms. Dell has several years utilities experience and has worked on three call center engagements. Christa has a MS in Psychology from Georgia Institute of Technology and a BS in Psychology and History from Emory University

Representative Client List

- Southern Company
- Ontario Hydro
- Commonwealth Edison
- Ameren
- AmSouth Bank
- Baltimore Gas & Electric

Functional Expertise

- Customer Service Functions (Billing, Credit and Collections)
- Communications
- Training

Relevant Experience

- Supported development of consolidated call center business case for American Water Works
- As a Team Lead, was responsible for conducting an impact assessment of a new Customer Information and Billing system for Field operational procedures in Call Center and Field locations. Identified changes to the way work was to be done and developed a training curriculum tailored to various Field user groups. Also devised a plan for assessing staff proficiency during the training period
- Worked with this Client to plan and manage their workload associated with the implementation of new billing system (CIMS). Specifically, identified areas for improvement and developed and implemented sustainable business processes for the systems billing location
- Designed and developed an on-line help function for the Customer Information System application that replaced the Client's existing Customer Information and Meter Management Systems. Also coordinated an effort that created a simulated system application which provided a realistic, yet safe environment for training
- Designed and developed job aids related to a new Customer Service system that replaced 9 core systems used by the Client's five operating companies





**Scott Yager**

**Background**

Mr. Yager is a Manager for Andersen Consulting and has worked on several call center and customer service development engagements. He brings an extensive knowledge of deregulated markets in the Utilities industry along with valuable experience in call center organizational structure. Mr. Yager has a BS in Industrial Distribution and a MS in Management Systems from Clarkson University

**Representative Client List**

- Carolina Power & Light
- Commonwealth Edison
- UtiliCorp United

**Functional Expertise**

- Call Center Organization Structure
- Consolidation Planning
- Customer Information Systems
- Deregulated Markets Knowledge

**Relevant Experience**

- In a project involving the design of a new organization structure for the new customer service center, responsibilities included: advising team members and management on organization structure, recruiting and selection practices and customer service based best practices and assisting in the design and development of workplans, standards and deliverable expectations
- Worked directly with Call Center management and administration to determine the amount of impact the Client's call center can expect during the implementation of a new Customer Information System. This included developing and establishing a staffing model and key service levels like: expected call volumes, talk times and average speed of answers. Also responsible for the design, development and implementation of week long workshop with top level supervisors to review and discuss the major impacts and changes to the organization resulting from the new customer system
- As a Call Center Impact Assessment Team Member on a project involving the complete reengineering of the Client's customer service organization, was responsible for the design and development of the workplans and team structure for the detailed design phase of the project. Also designed the new organizational structure within the call centers and the organizational structure to support the outsourcing vendor

### Katherine Brown

#### Background

Ms. Brown is a Consultant for Andersen Consulting. Katie has worked on several projects involving call center improvements, consolidations and build-outs. Along with her knowledge of call center organizational structures, Ms. Brown also has a strong background in call center technical implementations. She has a BA in Spanish and English from Wake Forest University.

#### Representative Client List

- Bank of America
- BellSouth Telecommunications, Inc.

#### Functional Expertise

- Call Center Build-out
- Siebel Implementation
- Change Management
- Organization Design and Development

#### Relevant Experience

- NationsBank (now Bank of America) - As a result of the recent merger with Bank of America, this project included consolidating call centers and implementing standard call center and internet processes and technologies in each site. A phased implementation was used.
  - California Transition - As the Organization Change Team Analyst, specific responsibilities included: determining the approach for placing existing associates into new positions, looking at existing call center jobs and mapping them to new positions, Creating organizational charts for the target organizations by working with Planning and Operations/Forecasting revising existing call center job descriptions and integrating with job descriptions from other lines of business that will become part of the new call centers
  - Southwest Transition - Having dual roles as Organization Change Team Analyst and Implementation Team Coaching Coordinator on this project, responsibilities included: creating Organization/Personnel orientation materials for new hire and existing call center, tracking existing associate placement, new hires, and attrition through transition and scheduling all resources to provide adequate coverage through the implementation events
- NationsBank - As a result of the merger with Barnett Bank, this call center build-out project included implementing new call center and internet processes and technologies in existing call center sites. As the Training Assessment Analyst, responsibilities included: analyzing the current call center CBT (Computer-Based Training) and assessing modifications needed, documenting how many hours would be required to make the CBT revisions, researching new applications for developing a training demo and making a recommendation, coaching call center associates through implementation
- Served on the Direct Banking Advisory Committee at Bank of America 1998-1999



**Dawn Dickey**

**Background**

As a Manager in Andersen Consulting's utilities practice, Mrs. Dickey's experience has focused on customer service engagements. She has deep business process and technology expertise and has been involved in a variety of call center front-office and back-office engagements. Mrs. Dickey has a BS in Management Information Systems and a BS in Marketing Management from Florida State University

**Representative Client List**

- Southern Company
- Shell Energy Services
- United Parcel Service
- Sietel Utility Vertical Project

**Functional Expertise**

- Customer Relationship Management
- Customer Information Systems
- Call Centers

**Relevant Experience**

- Assisted in development of consolidated call center business case for American Water Works, focusing on the back office functions including pre-bill validation, bill calculation and credit & collections.
- Assisted in build-out of Siebel's Call Center software product focused on regulated industries (electric, gas and water). Mrs. Dickey supervised a team responsible for developing an industry-specific 'configuration template' used to serve the utilities industry and to jumpstart the implementation of Siebel's CRM software for the utilities industry.
- Led several teams during the design and implementation of new customer service business processes and systems for a large southeastern utility operating as several companies in several state jurisdictions
- Led the design of back-office customer support functions for the call center operations of a company focused on the national electric retail market



**Brian Hurst**

**Background**

Brian Hurst is a Manager in Andersen Consulting's Resources Practice, which focuses on the Chemicals, Energy, Utilities, and Natural Resources market sector. Mr. Hurst has ten years call center technology experience and seven years call center operational experience. Mr. Hurst is responsible for the Customer Relationship Management (CRM) Infrastructure Community of Practice in Andersen Consulting's Network Solutions group. Mr. Hurst has a BS in Telecommunications Management from DeVry Institute of Technology.

**Representative Client List**

- DHL Worldwide Express
- Wisconsin Electric
- Stanley Works
- BellSouth
- UtiliCorp United Inc.
- West Coast Energy
- TDS Telecom
- BOC Gases
- State Farm Insurance
- Niagra Mohawk Power
- ComEd
- Air Liquide
- Sprint PCS
- MidAmerican Energy
- PP&L

**Functional Expertise**

- Customer Service
- Call Center Strategy
- Call Center Operations
- Facility Management
- Call Center Build-out

**Relevant Experience**

- Supported development of consolidated call center business case for American Water Works
- Managed a project to conduct a call center technology assessment. Identified key technologies initiatives (e.g., CTI (Computer Telephone Integration), web-telephony integration, multimedia kiosks, etc.) required to achieve client's call center operational vision. As part of the project, the team created a detailed cost/benefit analysis, prioritized the initiatives, and outlined a technology migration plan. The team recently completed a CTI vendor selection project with the implementation phase underway
- Developed a CRM capability blueprint, conceptual design, detailed business case and strategic plan for consolidation of this client's call handling support into a greenfield call center operation. The business integration blueprint included all capabilities (e.g., culture, strategy, organization, facilities, application, process, etc.) for supporting customer service, sales field support, and trouble calls within the future call center operation
- Responsible for the development of this Client's overall work program effort to consolidate call processing of order entry, order inquiry and debt collections into an existing call center operation. The project included documenting high-level business processes and assessing implications to the existing environment
- Assisted in the overall development of a call center consolidation business case with specific focus on the call handling technology. The project team's business case addressed the consolidation effort of over 150 store front offices and several formal call centers into two future sites. During the design phase, Mr. Hurst was responsible for the call center technology, voice network services and data communications for the future operations. He also assisted in the operational areas of future call centers, including creating a staff forecasting estimating model, site selection analysis, and facilities build-out criteria
- Provided subject matter expertise in the development of a call center consolidation detailed business case and conceptual design. The scope of the business case effort addressed consolidation from over 15 locations to 3 sites in phase 1 and eventually to two locations in subsequent phases



**Peter Effler**

**Background**

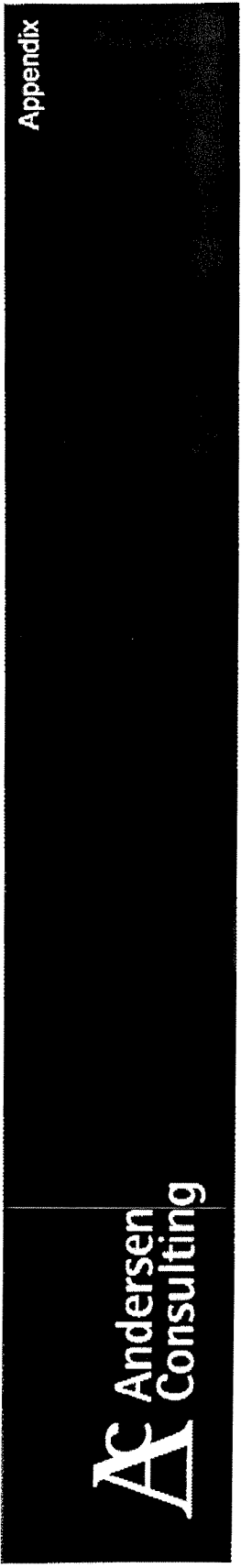
Mr. Effler is a Partner in the Automotive, Industrial & Transportation Market Unit of Andersen Consulting. His fifteen years with Andersen include work in automotive CRM solutions and outsourcing, design and implementation of integrated client server applications for manufacturing and engineering systems, reengineering of the product development process and various manufacturing productivity improvement projects. Mr. Effler has a BA in Communications and a BS in Mechanical Engineering from the University of Notre Dame and a MS in Industrial Engineering from the University of Cincinnati.

**Functional Expertise**

- CRM
- Engineering and Operations
- Automotive, Industrial and Transportation Products and Services
- Strategic Planning
- Process Improvement
- Integrated Client Server Applications

**Relevant Experience**

- Supported development of consolidated call center business case for American Water Works
- Business case development, due diligence and delivery leadership responsibility for an outsourcing arrangement with a major automotive OEM (Ford) to provide call center operations (BPO) services. The initiative included the Design/Build of required systems, selection/build-out of a new "greenfield" site, and launch of operations. Subsequent to the initial contract, Mr. Effler has led an effort to add new service offerings to the call center including survey/mail processing, Email processing and Web-based, self-help development.
- Led an accelerated effort at a large tier one automotive supplier to implement a Sales Force Effectiveness solution for a fledgling sales force
- Project leader in the design and implementation of a product development methodology for GM's Inland Fisher Guide Division. The project scope included an analysis of the current information and engineering systems, training of staff designers in the methodology and the development of a systems "vision" for the future. The resulting methodology was based on GM's four phased development approach and incorporated techniques such as quality function deployment (QFD) and design for manufacturability (DFM).
- Program Manager for the implementation of three client server systems initiatives at a manufacturer of Automated Teller Machines and security systems. The initiatives include Product Data Management (PDM) which is primarily focused in the engineering organizations, Enterprise Resource Planning (ERP) which is an enterprise-wide initiative to replace a wide variety of legacy systems, and a Technical Infrastructure Project which is an initiative to provide the network and computing environments necessary for the client server applications being implemented.
- Managed an effort at a manufacturer of electro-mechanical relays for avionics systems to reduce overall plant inventories, improve plant operations/procedures and improve customer delivery. The project resulted in substantially reduced inventory, improved customer deliveries and provided a reengineered operations environment which provided the basis for the installation of MAPICS manufacturing software.



**Carolina Power & Light**

**Client Overview**  
 CP&L (Carolina Power & Light Company) is a 2 million customer utility serving electric and gas customers in North Carolina and South Carolina. They intend to be a leading southeast region energy provider and have recently announced an acquisition of another utility, Florida Power Corporation. They have served the Carolinas for approximately 90 years serving a wide variety of customers in both rural and urban areas.

**Business Challenge**  
 Facing deregulation of the utilities industry, Carolina Power and Light (CP&L) needed to change its focus to become a customer-focused organization. In order to cut costs, improve service and position for growth in revenues, it was necessary for CP&L to

- Incorporate reengineered work processes, best practices, laws, policies and procedures for South Carolina, and new technology
- Prepare CSR's for a new culture
- Staff a call center recognizing approximately one-half of the incumbents would remain. Incumbents provided less than half the of CSR's needed to staff the Center
- Develop a new hire training program to ensure learning and skill-building began before CSR's handed calls

**Andersen Consulting Approach**  
 As part of CP&L's Customer Service Center (CSC) Project, Andersen Consulting helped

- Consolidate fifty-two field offices into one call center
- Develop a new training program for employees using the goal-based scenario (GBS) learning approach in addition to traditional instructor-led training
- Develop new business processes for the center
- Implement a new CIS

**Benefits**

- Reduced operational costs by 30%
- Reduced time to proficiency for CSR's
- Increased market share
- Increased customer satisfaction



**Pennsylvania Power & Light**

**Client Overview**  
 PP&L, Inc. provides electric delivery service to 1.3 million homes and businesses in 29 counties of eastern and central Pennsylvania, generates electricity, and markets or trades wholesale energy in the United States and Canada through its Energy Marketing Center. It is a subsidiary of PP&L Resources, Inc., a Fortune 500 company based in Allentown, PA.

**Andersen Consulting Approach**  
 The scope of the work included the following primary work activities and specific objectives:

- Development of a call intercept program to improve service levels
- Review technology plans to identify additional opportunities to reduce average handle times
- Review and modify core processes to reduce after-call clerical time
- Create a customer and employee satisfaction surveys to clarify performance issues
- Assist the Center management team to develop an understanding and skill in call center and change management principles in an effort to improve leadership effectiveness
- Reconfigure supervisor and CSR roles to realign available skills
- Prepare a balanced scorecard to clarify and measure financial, operational, customer and employee requirements for success
- Align performance development (i.e., training) and performance management (i.e., appraisal, reward and recognition) programs with process and role changes

**Business Challenge**  
 The primary goal of the PP&L Contact Center Renewal Initiative was to implement an operational excellence call center strategy. The specific objectives of the Initiative were to

- Reduce projected annual operating costs in the Center
- Enhance the use of assets and personnel
- Improve customer and employee satisfaction

**Benefits**  
 While the work was undertaken as a value-based billing arrangement with over 50% of the professional fees at risk, Andersen Consulting personnel worked with PP&L personnel on the Renewal Initiative team to accomplish the following tasks

- Reduced annual operating costs
- Reduced average handling times
- Reduced after-call clerical time
- Increased customer satisfaction
- Increased job satisfaction



### Ford Motor Company

#### Client Overview

Ford Motor Company is the second-largest car and truck producer in the world and is ranked second on the Fortune 500 list of the largest U.S. industrial corporations, based on sales. In 1996, Ford's world-wide sales and revenues totaled \$147.0 billion, up 7 percent from 1995. Ford was also the leading exporter of vehicles from the United States and Canada, with a record of 139,418 units. Although Ford is better known as a manufacturer of cars and trucks, it now produces a wide range of other products including industrial engines, construction machinery, glass and plastics. And Ford is established in a wide range of other businesses -- including financial services, insurance, automotive replacement parts, electronics and land development.

#### Business Challenge

- Multiple customer assistance and marketing support operations existed throughout the organization
- Decentralized operations handled phone calls and direct mail and survey comments for all Ford products
- Organization lacked accessibility to integrated customer information
- In order to create greater shareholder value, costs needed to be reduced and savings re-allocated

#### Andersen Consulting Approach

- Andersen Consulting partnered with Ford to build and run its North American Customer Assistance Center (CAC)
- Consolidated multiple existing call centers into one 200+ seat customer assistance center
- Implemented new physical layout of Center to support teams of fifteen CSR's and one team lead
- Provided lower cost, high-touch customer service to customer inquiries and concerns related to Ford's product line

#### Benefits

- Ford refocused on core business
- Reduced customer assistance costs by 20%
- Succeeded high-touch Customer Service level
- Reduced employee turnover
- Reduced classroom training time by 50%



### Bank of America (formerly NationsBank)

#### Client Overview

NationsBank was the third largest Retail Bank in the United States before its \$43 billion acquisition of BankAmerica. The resulting company, now known as Bank of America Corporation, is the fourth largest bank in the world, and the largest national bank, operating coast-to-coast. Bank of America offers consumer, commercial, and global corporate banking; commercial real estate investment and brokerage services; insurance; and mutual funds to 30 million households and two million businesses in 190 countries.

#### Business Challenge

Over the past several years, NationsBank had expanded its franchise through mergers and acquisitions. As the bank worked towards achieving the vision of a nationwide franchise they began to focus on delivering a consistent customer experience of "anytime, anywhere." As part of this effort, the Bank began construction of the Direct Banking solution. Direct Banking would ultimately deliver call centers that provide consistent experience, business functions and technologies across channels. Telephone and Web banking were the first components of the solution to be implemented. The key objectives were:

- Sales and retention of targeted customer segments to maximize revenue
- Expansion of delivery channel options
- Consistency of experience and brand recognition
- Increased operational efficiency while enhancing customer satisfaction

#### Andersen Consulting Approach

Andersen Consulting partnered with NationsBank to design, build and deliver the call center solution. As a part of this partnership, Andersen Consulting worked with the bank to defer the cost of development and better align those payments with the benefits of the solution.

The largest component of the effort has been consolidating multiple call centers and constructing six sites across the country. Siebel forms the basis for the new service fulfillment systems which allows customer requests to be handled more efficiently. The Web banking software enables customers to access their account information and interact with the bank over the web.

#### Benefits

- Increased sales based on cross-sell prompts in the VRU's (Voice Response Units), and on the agent's desktop
- Developed virtual call network that allows dynamic routing of calls based on customer need and agent availability without regard to physical location
- Delivered a single 800 number which increased customer satisfaction
- Enhanced VRU capabilities that allows for increased VRU utilization and lower operational costs
- Increased ability to identify customers and have all appropriate relationship information available for agents



**Entergy**

**Client Overview**

Entergy Corporation, headquartered in New Orleans, Louisiana, is a \$6 billion energy company with worldwide power production and diversified electric service operations. Its regulated subsidiaries deliver electricity and related services to 2.4 million retail customers in Arkansas, Louisiana, Mississippi, and Texas. Other subsidiaries provide wholesale electricity to other utilities, own and operate domestic and overseas power systems, and sell energy management, security monitoring, and telecommunications systems and services.

**Business Challenge**

In an effort to improve business processes, service, cost effectiveness and call center responsiveness, the Entergy Customer Service organization conducted several Renewal projects as part of a corporate-wide Renewal effort. With call center responsiveness identified as the second most critical area to focus on to improve Customer Satisfaction, the following key indicators were determined:

- Agent Accessibility (total number of calls answered in greater than 30 seconds)
- Agent Knowledge and Authority (total repeat calls excluding outage calls)
- Agent Willingness to Help and Listen (Customer Call Center post transaction survey)
- Field Commitment Follow Through (total number of commitments not met)

**Andersen Consulting Approach**

To address the key indicators Andersen Consulting co-managed several projects to improve the business process, technology, and organizational performance of the centers. A significant element of the improvement effort was the development of a customer service representative training program. In addition, we made several business process changes to support improved call throughput.

**Benefits**

- Shortened time to proficiency which improves agent productivity
- Reduced call volume associated with repeat calls by enabling agents to resolve customer needs on the first call
- Reduced training costs by shortening the duration of agent training
- Reduced time to proficiency to 3-4 months
- Reduced call volume
- Improved customer satisfaction and reduced complaints to the regulator

*Handwritten notes:*  
 1. 10/1/03  
 2. 10/1/03  
 3. 10/1/03  
 4. 10/1/03  
 5. 10/1/03  
 6. 10/1/03  
 7. 10/1/03  
 8. 10/1/03  
 9. 10/1/03  
 10. 10/1/03



## Ontario Hydro

### Client Overview

Ontario Hydro is the largest electric utility in North America in terms of installed capacity. Its customers include 306 municipal electric utilities serving more than 2.8 million customers, 954,440 direct retail customers and 103 large direct customers. The Ontario Hydro system includes 69 hydroelectric stations, 5 nuclear stations and 6 operating fossil-fueled stations. Total system capacity is approximately 34,000 megawatts, transmitted across 29,000 kilometers of transmission lines and 109,000 kilometers of distribution lines. Ontario Hydro was created in 1906 by provincial statute and operates today under the Power Corporation Act of Ontario.

### Business Challenge

In the wake of deregulation, the immediate challenge to Ontario Hydro was to:

- Reduce operating costs
- Assess the feasibility of consolidating billing, telephone customer service and collections activities into one call center
- Reduce the percentage of blocked calls which reached over 58%
- Provide standardized service procedures across different customer interfaces

### Andersen Consulting Approach

Andersen Consulting assisted Ontario Hydro in consolidating 15 centers to 2. Responsibilities included:

- Developing a call center consolidation assessment and business case
- Designing new jobs and organization requirements
- Redesigning business processes
- Developing plans to create executive sponsorship and workforce ownership
- Training 250 Call Center staff and 800 affected staff in the operations centers, both incumbents and new hires using goal-based scenario learning and instructor-led training
- Controlling pace and volume of change initiative and communication during multiple projects
- Aligning staffing strategy and selection, and organization design to business objectives

### Benefits

- Decreased operational cost (client confidential)
- Increased market share (client confidential)
- Increased customer satisfaction (client confidential)
- Installed motivation and recognition programs
- Trained operations staff in new performance standards in a customer-focused environment

# Andersen Consulting Task Package Description

**Task Package:** Project/Program Management      **Phase:** Management

**Objective:** The objective is to provide leadership and management with vision, communications, a business case, work plan monitoring, facilitated integration sessions for the extended corporation and identification & mitigation of risks.

**Tasks**

- Project Initiation
- Establish and Maintain Program Office
- Maintain & Report Project Status
- Manage Change in Organization
- Manage Performance

**Key Deliverables**

- Signed Arrangement Letter
- Detailed Work Plans
- Program Office Team and List of Initiatives
- Program Plan
- Consistent Messages
- Issue Tracking
- Resolutions
- Updated Project Scorecard
- Status Report
- Facilitated Meetings
- Announcements
- Readiness Report
- Change Action Plan
- Consistent Newsletter, Articles, etc
- Risk Report from team members reporting risk
- Mitigation Plan
- Status Reports & Communication

- Prerequisites:**
- Negotiated Arrangement
- Links:**
- Through Out Project

# Andersen Consulting Task Package Description

**Task Package:** Assess Current Operations

**Phase:** Conceptual Design

**Objective:** The objective is to build a detailed understanding of current operations among several key team members that will be designing the new operating model. This is essential for building the foundation for which everything else is built.

**Tasks**

- Personnel Interviews/Shadowing
  - (Call Center Management, CSR's, Technical Resources, Other Support Staff, Customers)
- Assess Current Processes/Operations
  - Training Review, Call Center Core Processes, Performance Metrics, Inbound/Outbound Call Activities, Review Call Flows, Routing/Handling Procedures, and Service Levels
- Assess Current Technology Utilization
  - ACD, LAN, Workstations & Review Management Reporting Capabilities, Review Business Applications Review Call Volumes
- Assess Current Organization and Staffing
  - Organization Operating Structure
  - Staffing skills and numbers
  - Cultural insight
- Develop Baseline Operating Model

**Key Deliverables**

- Systems Utilization Assessment
- Customer Access Options/Call Flows
- Staffing Model
- Process Opportunities
- Operational Opportunities
- Change Management Assessment
- Current Customer Interaction Methods
- Current Architecture Assessment
- Current Network Architecture
- Business Capability Blueprint

**Prerequisites:**

- Program Office Operational
- Project Communications Sent
- Pre-data gathering activities

**Links:**

- Vision Development
- Define Process, Technology, Organizational Requirements

# Andersen Consulting Task Package Description

**Task Package:** Refine Future Vision

**Phase:** Conceptual Design

**Objective:** Based on the detailed assessment update and/or modify the consolidation vision. This vision will provide guidance in issue resolution, insight for the project team, and communications to the extended organization.

## Tasks

- Establish Strategic Operating Objectives
- Formulate & Evaluate Strategic Operating Alternative
- Develop Operating Hypothesis
- Refine benefits & Costs
- Update Deliverables

## Key Deliverables

- Operating Goals
- Operating Model Strategies
- Operating Channels and performance
- Updated Business Case
- Deliverable Documents

## Prerequisites:

- Baseline Operating Model

## Links:

- Operational Blueprint
- Updated Business Case

# AC Andersen Consulting Task Package Description

**Task Package:** Define Front Office Process Model      **Phase:** Conceptual Design

**Objective:** Utilizing best practice information and the baseline assessment design the processes with their associated metrics to be used in call services. Identifying the gaps between the new processes and the baseline will provide an understanding of the gap.

## Tasks

- Define Front Office Guiding Principles
- Identify Benchmark "Best Practices"
- Select & Categorize Call Types
- Define Call Flows & Hand Offs
- Develop Balanced Scorecard w/Initial Goals
- Identify Potential Functions/Applications
- Define Process Changes

## Key Deliverables

- Rules for Doing Business
- Best Practice Activities & Measures
- Channel & Call Type Definitions
- Integrated Call Flow Diagrams
- Balanced Scorecard
- Business Technology Matrix
- Business Process Gap Analysis

## Prerequisites:

- Baseline Assessment
- Operating Vision

## Links:

- Organizational Requirements
- Facilities Requirements
- Detailed Business Procedures

# AC Andersen Consulting Task Package Description

**Task Package:** Define Back Office Process Model      **Phase:** Conceptual Design

**Objective:** Utilizing best practice information and the baseline assessment design the processes with their associated metrics to be used in consolidated billing and collections. Identifying the gaps between the new processes and the baseline will provide an understanding of the gap.

## Tasks

- Define Back Office Guiding Principles
- Identify Benchmark "Best Practices"
- Define Billing Process Model
- Define Credit & Collections Process Models
- Define Process Flows w/Integration Points
- Develop Balanced Scorecard w/Initial Goals
- Identify Potential Functions/Applications
- Define Process Changes

## Key Deliverables

- Rules for Doing Business
- Best Practice Activities & Measures
- Process Models
- Process Models
- Integrated Process Diagrams
- Balanced Scorecard
- Business/Technology Matrix
- Business Process Gap Analysis

## Prerequisites:

- Program Office Operational
- Project Communications Sent
- Pre-data gathering activities

## Links:

- Vision Development
- Define Process, Technology, Organizational Requirements



# Andersen Consulting Task Package Description

**Task Package:** Define Technology Requirements      **Phase:** Conceptual Design

**Objective:** The objective is to identify all technical components to be used in a consolidated center for enabling efficient and effective business processes. The technology should be viewed as supporting business procedures within the consolidated center and integrated with other technology to support the complete organization.

## Tasks

- Identify Call Volumes, Types & Flows
- Identify Technology Enablers(AMI, IVR, CTI, WEB)
- Define Business Application(CIS, Work Mgmt, Reference, Training, Communications, Tools)
- Define Technology & Network Requirements
- Define Technical Performance Requirements
- Define Technical Integration Points Internal/External

## Key Deliverables

- Business/Technical Diagram w/Capacity
- Technical Components List/Descriptions
- Business Application High Level Requirements
- Network Architecture Diagram
- Systems Performance Metrics
- Technical Integration Diagram

- Prerequisites:**
- Baseline Assessment
  - FO/BO Processes
- Links:**
- Technology RFP
  - Facility Requirements

# AC Andersen Consulting Task Package Description

**Task Package:** Develop & Distribute Technology RFP      **Phase:** Conceptual Design

**Objective:** Based on the technology identified develop strategies for bundling technical components from different providers. Discussions with different vendors will provide guidance in further detailed design activities.

| Tasks   | Key Deliverables  |
|---|---|
| <ul style="list-style-type: none"> <li>■ Develop Technology RFP Strategy</li> <li>■ List Technology Needs &amp; Vendors</li> <li>■ Develop Detailed Requirements</li> <li>■ Develop Selection Criteria</li> <li>■ Distribute RFP's</li> </ul> | <ul style="list-style-type: none"> <li>■ RFP Strategy (Bundling of Req.)</li> <li>■ List of Vendors (Strengths/Weakness)</li> <li>■ Business/Technical Requirements</li> <li>■ Evaluation Criteria</li> <li>■ Confidential Agreements</li> </ul>  |
|   | <p><b>Prerequisites:</b></p> <ul style="list-style-type: none"> <li>■ Technology Requirements</li> <li>■ Operating Assessment and Vision</li> </ul> <p><b>Links:</b></p> <ul style="list-style-type: none"> <li>■ Facility Requirements</li> <li>■ Technology Procurement and Deployment</li> </ul> |

# Andersen Consulting Task Package Description

**Task Package:** Define Organizational Requirements      **Phase:** Conceptual Design

**Objective:** The objective is to outline the cultural framework for building an organization driven to achieve their business vision of operational excellence or customer intimacy. This framework includes roles, careers, and organization structure.

## Tasks

- Identify Future Organizational Strategy
- Identify Cultural Framework
- Define Organizational Structure
- Define Role Descriptions
- Define Career Alternatives

## Key Deliverables

- Organization Strategy (Competency)
- Cultural Framework
- Organization Chart
- Role Descriptions
- Career Path Definitions

## Prerequisites:

- Future Vision
- Front Office and Back Office Processes

## Links:

- Design of Roles and Skills

# AC Andersen Consulting Task Package Description

**Task Package:** Customer Support Center Location      **Phase:** Conceptual Design

**Objective:** Identification of the appropriate site and facility to house the customer support group and their business capabilities. Developing the criteria for determining the location will be critical.

## Tasks

- Identify Top 25 Sites
- Screen Sites on Quality of Life to 10
- Screen Sites on Business Climate to 2-3
- Formulate Facility Selection Criteria
- Identify 2-3 Candidate Facilities Per Site
- Perform Site/Facility Visits
- Prioritize Sites/Facilities to Top 2-3
- Re-validate facility requirements
- Negotiate for Facilities

## Key Deliverables

- List of Sites
- Top Ten and Why
- Top 2-3 and Why
- Facility Evaluation Forms
- List of Sites/Facilities Features
- Assessment Reviews
- List and Why
- Updated Requirements & Gap Analysis
- Letter of Indemnification and/or Contract

## Prerequisites:

- FO/BO Business Processes
- Technical Requirements

## Links:

- Final Conceptual Design
- Designing the facility blueprint
  - ◆ telecommunications
  - ◆ electrical
  - ◆ backups

# AC Andersen Consulting Task Package Description

**Task Package:** Design & Develop FO/BO Business Procedures      **Phase:** Detail Design & Build

**Objective:** The objective is to design in detail the business procedures, activities, triggers, outcomes needed for handling all customer contact, processing of bills and the collection of money's owed in a manner appropriate to achieve the operational strategy and metrics.

## Tasks

- Finalize Call Types & Business Requirements
- Design Call and Process Flows (Triggers, In/Output)
- Design Activities & Develop Business Procedures
- Design and Develop Interfaces & Integration Plans
- Identify Performance Indicators & Levels
- Design Performance Measurement Process
- Design Business Technology Enablers
- Develop Consolidated Capacity Plan

## Key Deliverables

- Validated Call Types & Bus Req
- Detailed Call Flow Diagrams
- Detailed Call Handling Procedures
- Detailed Integration Diagrams/Procedures
- Balanced Scorecard Metrics
- Measurement Process Requirements
- Desk Top Configuration & Network Components
- Detailed Capacity Plan

## Prerequisites:

- FO Business Processes
- BO Business Processes
- Organizational Roles

## Links:

- Training Plan Development
- Final Systems Requirements

# Andersen Consulting Task Package Description

**Task Package:** Design Organization, Roles & Skill Sets, Recruiting **Phase:** Detail Design & Build

**Objective:** The objective is to build a detailed organization model for transitioning the company to a consolidated customer support group. The organization Model should address jobs, skills, education, career, role, responsibilities, team structure, & recruiting plans.

| Tasks   | Key Deliverables  | Prerequisites:   | Links:   |
|---|---|--|--|
| <ul style="list-style-type: none"> <li>■ Define Organization, Levels, Responsibilities</li> <li>■ Define team roles, responsibilities, &amp; incentives</li> <li>■ Define Human Performance Metrics</li> <li>■ Define Team &amp; Individual Skills &amp; Competencies</li> <li>■ Develop Detailed Job Descriptions</li> <li>■ Develop Detailed Team Performance Plans</li> <li>■ Develop Severance &amp; Outplacement Packages</li> <li>■ Develop Recruiting &amp; Hiring Profiles</li> </ul> | <ul style="list-style-type: none"> <li>■ Organization Responsibility Chart</li> <li>■ Team Roles/Incentives</li> <li>■ Balanced Scorecard Metrics</li> <li>■ Skill Design</li> <li>■ Job Descriptions</li> <li>■ Team Performance Plan</li> <li>■ Severance &amp; Outplacement Package</li> <li>■ Staffing &amp; Recruiting Plan</li> </ul> | <ul style="list-style-type: none"> <li>■ Cultural Framework</li> <li>■ High level organization structure and roles.</li> </ul> | <ul style="list-style-type: none"> <li>■ Training Material</li> <li>■ Facility Layout</li> </ul> |

# AC Andersen Consulting Task Package Description

**Task Package:** Design & Develop Training Plan      **Phase:** Detail Design & Build

**Objective:** The objective is to create a training plan based on building a work force that will provide consistent customer contact and back office service levels.

## Tasks

- Review & Update Jobs/Processes/Skills
- Develop Training approach/Needs Analysis
- Develop Training Curriculum Plan
- Develop Training Development Work plan

## Key Deliverables

- Updated Deliverables
- Training Approach
- Training Curriculum
- Training Development Work Plan

## Prerequisites:

- FO/BO Procedures
- Teams, Roles, Jobs, Skills

## Links:

- Training Material Development

# AC Andersen Consulting Task Package Description

**Task Package:** Design, Develop, Procure Systems & Telecommunications      **Phase:** Detail Design & Build

**Objective:** The objective is to have a complete technical architecture(voice and data), systems applications requirements and vendors identified and contracted.

## Tasks

- Review Call Volumes, Flows and Business Requirements
- Design Technical & Network Configuration
- Develop Phone Number Strategy & Plan
- Update Technical RFP's & Negotiate Deals
- Finalize Systems & Network Architecture
- Determine Business Application Requirements
- Design Application Enhancements and/or identify Packaged Applications
- Identify PC/Network Computing hardware / software requirements (PC Workstations, Printers, Fa/Modem, LAN/WAN)
- Develop and Distribute RFP's for Hardware, Communications Equip. and Package Applications
- Design & Develop Security Requirements by System

## Key Deliverables


- System Capacity Requirements
- Detailed Configurations
- Phone Number Plan
- Sign Contracts for Network Components
- Detailed Architecture
- Detailed Applications Requirements
- Detailed Application Design and/or Package identification
- Detailed Hardware/Software Purchase Orders
- Signed Confidentiality Agreements & RFP's
- Security Plan

## Prerequisites:

- Call Types and Flows
  - Initial RFP's delivered
- Links:**
- Facility Requirements
  - Warm Backup Requirements
  - Technology Build, Installation, Tes:



Appendix



# Task Package Description

**Task Package:** Design Facility **Phase:** Detail Design & Build

**Objective:** The objective is create the facility blueprint based on specific business processes, technology, and organizational requirements. Additionally, a contractor should be retained and ready to refurbish/build.

| Tasks   | Key Deliverables  |
|---|---|
| <ul style="list-style-type: none"> <li>■ Design Facility Work Spaces (FO, BO, Training, Technology, Security, Executive, Support, etc.)</li> <li>■ Define Telecommunications, Computer, and Electrical Requirements.</li> <li>■ Define Other Requirements (Hurricane, Flood, Fire)</li> <li>■ Obtain Architect &amp; Develop Blueprint</li> <li>■ Develop and Distribute RFP for Facility Build Out</li> <li>■ Negotiate and Procure Contractor</li> <li>■ Obtain Building Permits</li> <li>■ Design &amp; Procure Initial Training Facility</li> </ul> | <ul style="list-style-type: none"> <li>■ Business Operations Facility Requirements</li> <li>■ Technical Infrastructure Requirements</li> <li>■ Misc. Requirements</li> <li>■ Facility Blueprint</li> <li>■ Signed Confidentiality Agreements</li> <li>■ Contractor Agreement</li> <li>■ Permits</li> <li>■ Initial Training Site Selected &amp; Designed</li> </ul> |
|   | <p><b>Prerequisites:</b></p> <ul style="list-style-type: none"> <li>■ Negotiated Facility Lease</li> <li>■ Process, Technology, &amp; Organizational Requirements</li> </ul> <p><b>Links:</b></p> <ul style="list-style-type: none"> <li>■ Facility Build-Out</li> <li>■ Equipment Purchases</li> <li>■ Technology Installation</li> </ul>                          |

Appendix

# Andersen Consulting Task Package Description

**Task Package:** Build Out Facility

**Phase:** Build & Implement

**Objective:** The objective is to have a completely functional building ready for consolidation. Consolidation will be done in phases thus the building readiness should coincide with staffing needs. Additionally, a small training facility will be required before transitioning to the main center.

**Tasks**

- Schedule Subcontractors
- Retrofit Plumbing, Electrical & Network Infrastructure
- Retrofit Heating & Cooling
- Build Wall Structures
- Install Electric, Plumbing, Network & Security Cameras
- Update Grounds and Parking
- Finish Walls & Install Trim, Paint & Carpet
- Install Security Monitors, Furniture and Fixtures
- Retrofit Initial Training Facility

**Key Deliverables**

- Contracts/Integrated Schedule
- Infrastructure rebuilt & Inspected
- Heating/Cooling Installed & Inspected
- Structural Inspection
- Installed Components & Inspected
- Completed Structure/Occupancy Certificate
- Facility
- Training Facility

**Prerequisites:**

- Contractor
- Blueprints & Permits
- Subcontractors Hired

**Links:**

- Consolidation Phases 1, 2, & 3

# Andersen Consulting Task Package Description

**Task Package:** Install, Configure, Test Technical Infrastructure & Systems      **Phase:** Build & Implement

**Objective:** The objective is to have all technical infrastructure components installed and tested.

## Tasks

- Build Development Environment:
- Order Voice Network
- Build LAN/WAN Infrastructure
- Develop Voice Network
  - \* Coordinate ACD Configuration
  - \* Coordination IVR & CTI Configuration
  - \* Develop IVR & CTI Database Access
  - \* Develop ACD Reports
- System Test Voice Network
  - \* Plan System Test ACD/IVR/CTI
  - \* Execute System Test ACD/IVR/CTI
- Enhance Applications
- Install Package Software & Configure

## Key Deliverables

- Develop Lab, Workstations, Tools
- Purchase Order
- Data Network
- Call Routing & Messaging System
- Validated Voice Network
- Enhancements of applications other than Orcom & Scheduling
- Training, Reference, etc.

## Prerequisites:

- Procurement of Technology
- Implementation Plan

## Links:

- Hardware/Software Deployment
- Overall Systems & Technical Tests

# AC Andersen Consulting Task Package Description

**Task Package:** Deploy Technology      **Phase:** Build & Implement

**Objective:** The objective is to deploy the workstations and the associated hardware and software and updating security access.

## Tasks

- Purchase PC/Network Computing hard/soft
- Install PC/Network Computing hardware/software
- Application/Reporting Installation
- Test PC/Network Computing hardware/software
- Set-up user-ids/passwords for LAN, Billing System, Field Services System, etc.

## Key Deliverables

- Servers, Routers, PC's, etc
- Installed Hardware/Software
- CIS/TCS/Training/Reference, etc.
- Unit Test of Install
- Security Database Structured

## Prerequisites:

- Technical Infrastructure
- Application Requirements

## Links:

- Systems & Telecommunications test
- Integration Testing

# Andersen Consulting Task Package Description

**Task Package:** Test Systems & Telecommunications      **Phase:** Build & Implement

**Objective:** The objective is to test all voice and data technical components, integration testing and final systems availability test prior to consolidation.

## Tasks

- Prepare Test Environment for Training
- Develop Telecommunications Test Plan
- Perform Telecommunications Test
- Develop Systems Test Plan
- Perform Systems Test
- Verify Telecommunications Systems Available
- Verify All Production Systems Available
- Define System Support Rqmts
- Develop System Support Escalation Responsibilities & Procedures

## Key Deliverables

- Systems Training Site
- Network Test Plan
- Network Tested
- Systems Test Plan
- Systems Tested
- Final Validation
- Final Validation
- Support Procedures
- Escalation Procedures

- Prerequisites:**
- Technology and Systems Deployment
- Links:**
- Provide Training
  - Consolidation

# AC Andersen Consulting Task Package Description

**Task Package:** Develop Training Material      **Phase:** Build & Implement

**Objective:** The objective is to have all material available for training of new resources for the consolidated contact center.

## Tasks

- Finalize Business Procedures
- Acquire Third Party Training Material
- Develop Training Materials & Desk References
- Compliance review Training Materials

## Key Deliverables

- Detailed Procedures Document
- Web Base Business Simulation
- Customized Simulation Training
- QA Review

## Prerequisites:

- Business Procedures Finalized
- Technology developed
- Training Plan

## Links:

- Training
- Consolidation

# AC Andersen Consulting Task Package Description

**Task Package:** Review Human Performance      **Phase:** Build & Implement

**Objective:** The objective is to develop awareness of opportunities in a consolidated environment, communicate hiring process, and identify possible candidates.

| Tasks   | Key Deliverables  | Prerequisites:  | Links:   |
|---|---|---|--|
| <ul style="list-style-type: none"> <li>■ Schedule HR Meetings w/Mgmt</li> <li>■ Review &amp; Update HR Plan for existing and new employees</li> <li>■ Schedule &amp; Hold Individual Employee Meetings                             <ul style="list-style-type: none"> <li>a) Review Performance Incentive Plan</li> <li>b) Review Severance Package</li> <li>c) Review Relocation Opportunities</li> <li>d) Distribute appropriate HR forms i.e. Coora</li> <li>e) Redeployment</li> <li>f) Outplacement</li> </ul> </li> <li>■ Identify Employees Willing to Relocate</li> <li>■ Prepare Info about New Location for Employees</li> <li>■ Determine and publish interview process and dates</li> </ul> | <ul style="list-style-type: none"> <li>■ Management Buy-In</li> <li>■ Updated Plans</li> <li>■ Buy in</li> <li>■ List of Interested Employees</li> <li>■ Site &amp; Facility Communications</li> <li>■ Recruiting &amp; Hiring Process Comm.</li> </ul> | <ul style="list-style-type: none"> <li>■ Recruiting &amp; Hiring Profiles</li> <li>■ Roles &amp; Responsibilities</li> <li>■ Site Location</li> </ul> | <ul style="list-style-type: none"> <li>■ Recruiting and Hiring</li> <li>■ Training</li> <li>■ Consolidation</li> </ul> |

# Andersen Consulting Task Package Description

**Task Package:** Recruit & Hire **Phase:** Build & Implement

**Objective:** The objective is to recruit and hire the best candidates for the available openings in a consolidated contact center.

**Tasks**

- Assign key HR resources to perform recruiting & Hiring
- Review Organization Structure, Job Profiles & Skill Descriptions
- Prepare Recruiting Plan & Schedule
- Define candidate contact opportunities (ie, press, job fair)
- Define Interview Guide and Selection Criteria
- Interview candidates
- Deliver offer to accepted candidates & message to candidates not accepted
- Document interview results for tracking purposes
- Coordinate & Communicate start dates & location for Training

**Key Deliverables**

- HR Personnel
- Reviewed Descriptions
- Recruiting Plan & Schedule
- Candidate Channel
- Interview Guide
- Qualified Candidates
- Offers
- Reports
- Hire Reports

**Prerequisites:**

- Roles and Skills
- Career Development Plans

**Links:**

- Training
- Consolidation



Appendix  
**Andersen Consulting Task Package Description**

**Task Package:** Train  
**Phase:** Build & Implement

**Objective:** The objective is train those resources just in time in order to staff all positions open in the consolidated contact center.

**Key Deliverables**

- Review Training Delivery Schedule
- Plan & Schedule Practice Calls (live customer calls)
- Train the Trainer
- Verify Target Site Training Facilities Available
- Coordinate Training with Recruiting
- Human Resources Orientation
- Deliver Training
- Evaluate Training
- Refine Training Material & Curriculum

- Updated Training Schedule
- Plan Calls
- Trainers Trained
- Training Site Available
- Integrated Schedule
- New Hire Orientation
- Trained Personnel
- Feedback Evaluation Report
- Updated Training

- Prerequisites:**
- Recruiting & Hiring
  - Training Material
  - Facilities
- Links:**
- Consolidation

# Andersen Consulting Task Package Description

**Task Package:** Consolidate, Prep & Post      **Phase:** Build & Implement

**Objective:** The objective is to have a transition of FO/BO activities to one consolidated customer contact site in a controlled manner.

## Tasks

- Order Forms & Letterhead for Target Call Center
- Order Supplies for Target Call Center
- Prepare Workstations (forms, supplies)
- Prepare Fulfillment Area (fax, printers, PC's, CRT's, supplies, mailing/shipping material, etc.)
- Develop Consolidation Day/Week Verification Checklist
- Organize Consolidation Day Issue Resolution Team & Escalation Procedures
- Develop Consolidator Day(s) Back-up Strategy.
- Communicate Consolidation Day Issue Resolution Team & Escalation Procedures
- Confirm Support Partner Availability for Consolidation Day(s)
- Communicate New Call Center Phone Numbers & Addresses to Affiliates/Business Partners
- Begin Diverting Phase 1 Step 1 Current Site Calls
- Begin Diverting Phase 1 Step 2 Current Site Calls
- Delete unneeded circuits at "from" site

## Key Deliverables

- Checklist
- Memo/ Contact List
- Backup Plan Memo?
- Escalation Guidelines Memo / Contact List
- Partner Available
- Communications
- 10 Reps Taking Calls, 7 BO Clerks
- 45 Reps Taking Calls, 30 BO Clerks

## Prerequisites:

- Training
- Facilities
- Technology,
- Procedures/Processes
- Organizational Structure

## Links:

- Phases 2 & 3



Detailed Existing Site Implementation Workplan

| Phase | Task/Package                            | Deliverables  | Dependencies  | Chain of Command  | Client Days   | AC Resources   | AC Staff   | Total Work Days  | Start Date   | End Date   | % Complete | Comments & Assumptions |
|-------|---|---|---|---|---|--|--|--|--|--|------------|------------------------|
| 1300  | 1300 Define Retail Office Process Model | 1300-1 Assess Current Process/Operations<br>1300-2 Analyze Existing Retail Office Models<br>1300-3 Conduct Process Improvement Studies<br>1300-4 Develop Process Model<br>1300-5 Develop Retail Office Process Model<br>1300-6 Develop Retail Office Process Model<br>1300-7 Develop Retail Office Process Model<br>1300-8 Develop Retail Office Process Model<br>1300-9 Develop Retail Office Process Model<br>1300-10 Develop Retail Office Process Model<br>1300-11 Develop Retail Office Process Model<br>1300-12 Develop Retail Office Process Model | 1300-1<br>1300-2<br>1300-3<br>1300-4<br>1300-5<br>1300-6<br>1300-7<br>1300-8<br>1300-9<br>1300-10<br>1300-11<br>1300-12 | 1300-1<br>1300-2<br>1300-3<br>1300-4<br>1300-5<br>1300-6<br>1300-7<br>1300-8<br>1300-9<br>1300-10<br>1300-11<br>1300-12 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010             | 1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010             | 100%       |                        |
|       | 1300-1                                  | Assess Current Process/Operations   | 1300-1  | 1300-1  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-2                                  | Analyze Existing Retail Office Models   | 1300-2  | 1300-2  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-3                                  | Conduct Process Improvement Studies   | 1300-3  | 1300-3  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-4                                  | Develop Process Model   | 1300-4  | 1300-4  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-5                                  | Develop Retail Office Process Model   | 1300-5  | 1300-5  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-6                                  | Develop Retail Office Process Model   | 1300-6  | 1300-6  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-7                                  | Develop Retail Office Process Model   | 1300-7  | 1300-7  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-8                                  | Develop Retail Office Process Model   | 1300-8  | 1300-8  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-9                                  | Develop Retail Office Process Model   | 1300-9  | 1300-9  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-10                                 | Develop Retail Office Process Model   | 1300-10   | 1300-10   | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-11                                 | Develop Retail Office Process Model   | 1300-11   | 1300-11   | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1300-12                                 | Develop Retail Office Process Model   | 1300-12   | 1300-12   | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
| 1400  | 1400 Define Bank Office Process Model   | 1400-1 Assess Current Process/Operations<br>1400-2 Analyze Existing Bank Office Models<br>1400-3 Conduct Process Improvement Studies<br>1400-4 Develop Process Model<br>1400-5 Develop Bank Office Process Model<br>1400-6 Develop Bank Office Process Model<br>1400-7 Develop Bank Office Process Model<br>1400-8 Develop Bank Office Process Model<br>1400-9 Develop Bank Office Process Model<br>1400-10 Develop Bank Office Process Model<br>1400-11 Develop Bank Office Process Model<br>1400-12 Develop Bank Office Process Model                   | 1400-1<br>1400-2<br>1400-3<br>1400-4<br>1400-5<br>1400-6<br>1400-7<br>1400-8<br>1400-9<br>1400-10<br>1400-11<br>1400-12 | 1400-1<br>1400-2<br>1400-3<br>1400-4<br>1400-5<br>1400-6<br>1400-7<br>1400-8<br>1400-9<br>1400-10<br>1400-11<br>1400-12 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1      | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010 | 1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010<br>1/1/2010 | 100%       |                        |
|       | 1400-1                                  | Assess Current Process/Operations   | 1400-1  | 1400-1  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-2                                  | Analyze Existing Bank Office Models   | 1400-2  | 1400-2  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-3                                  | Conduct Process Improvement Studies   | 1400-3  | 1400-3  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-4                                  | Develop Process Model   | 1400-4  | 1400-4  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-5                                  | Develop Bank Office Process Model   | 1400-5  | 1400-5  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-6                                  | Develop Bank Office Process Model   | 1400-6  | 1400-6  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-7                                  | Develop Bank Office Process Model   | 1400-7  | 1400-7  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-8                                  | Develop Bank Office Process Model   | 1400-8  | 1400-8  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-9                                  | Develop Bank Office Process Model   | 1400-9  | 1400-9  | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-10                                 | Develop Bank Office Process Model   | 1400-10   | 1400-10   | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-11                                 | Develop Bank Office Process Model   | 1400-11   | 1400-11   | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |
|       | 1400-12                                 | Develop Bank Office Process Model   | 1400-12   | 1400-12   | 1   | 1  | 1  | 1  | 1/1/2010   | 1/1/2010   | 100%       |                        |





Detailed Existing Site Implementation Workplan

| Task<br>Phase | Task & Activities                            | Deliverable                                      | Dependencies | Client Resource | Client Dates | AC Resource | AC Days | Test Work<br>Days | Start Date | End Date | % Complete | Comments & Assumptions |
|---------------|--|--|--------------|-----------------|--------------|-------------|---------|-------------------|------------|----------|------------|------------------------|
| 900           | Construct Client Design Check Point          | Approval   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 910           | Finalize & Implement Phase 1 (Cables & R)    | None   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3100          | Plan & Manage Implementation                 | Team Execution                                   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3110          | Client Site Preparation                      | Client Site Preparation                          | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3120          | Review & Finalize Design Requirements        | Final Design Requirements                        | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3130          | Finalize Implementation Plan                 | Final Implementation Plan                        | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3200          | Build-out Facility                           | Facility Construction                            | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3210          | Install & Configure Network                  | Network Installation                             | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3220          | Configure & Test Network                     | Network Configuration & Testing                  | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3230          | Install & Configure Servers                  | Server Installation                              | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3240          | Configure & Test Servers                     | Server Configuration & Testing                   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3250          | Install & Configure Storage                  | Storage Installation                             | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3260          | Configure & Test Storage                     | Storage Configuration & Testing                  | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3270          | Install & Configure Security                 | Security Installation                            | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3280          | Configure & Test Security                    | Security Configuration & Testing                 | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3290          | Install & Configure Backup                   | Backup Installation                              | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3300          | Configure & Test Backup                      | Backup Configuration & Testing                   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3310          | Install & Configure Monitoring               | Monitoring Installation                          | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3320          | Configure & Test Monitoring                  | Monitoring Configuration & Testing               | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3330          | Install & Configure Logging                  | Logging Installation                             | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3340          | Configure & Test Logging                     | Logging Configuration & Testing                  | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3350          | Install & Configure Disaster Recovery        | Disaster Recovery Installation                   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3360          | Configure & Test Disaster Recovery           | Disaster Recovery Configuration & Testing        | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3370          | Install & Configure Backup & Restore         | Backup & Restore Installation                    | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3380          | Configure & Test Backup & Restore            | Backup & Restore Configuration & Testing         | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3390          | Install & Configure Patch Management         | Patch Management Installation                    | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3400          | Configure & Test Patch Management            | Patch Management Configuration & Testing         | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3410          | Install & Configure Vulnerability Assessment | Vulnerability Assessment Installation            | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3420          | Configure & Test Vulnerability Assessment    | Vulnerability Assessment Configuration & Testing | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3430          | Install & Configure Incident Response        | Incident Response Installation                   | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3440          | Configure & Test Incident Response           | Incident Response Configuration & Testing        | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3450          | Install & Configure Business Continuity      | Business Continuity Installation                 | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3460          | Configure & Test Business Continuity         | Business Continuity Configuration & Testing      | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3470          | Install & Configure Compliance               | Compliance Installation                          | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3480          | Configure & Test Compliance                  | Compliance Configuration & Testing               | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3490          | Install & Configure Final Review             | Final Review Installation                        | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |
| 3500          | Configure & Test Final Review                | Final Review Configuration & Testing             | None         | None            | 1            | None        | 1       | 1                 | 7/7/06     | 7/7/06   |            |                        |





Detailed Existing Site Implementation Workplan

| Task/Phase  | Tasks & Activities  | Deliverable       | Dependency        | Client Resource | Client Days | AC Required | AC Days | Total Work Days | Start Date | End Date | Comments & Assumptions |
|---|---|-------------------|-------------------|-----------------|-------------|-------------|---------|-----------------|------------|----------|------------------------|
| <p>American Water Networks Shared Services<br/>Project Change Support, Control Plan<br/>Project Control Center and Back Office Deployment</p>   |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 5000 Prepare Legal Site Consolidation   | <ul style="list-style-type: none"> <li>5010 Create Forms &amp; Attachments for Target Call Center</li> <li>5020 Create Support for Target Call Center</li> <li>5030 Prepare Workstation/Forms, supplies</li> <li>5040 Prepare Initial Move Plan, Pre-Move, M.O.M., M.O.S.</li> <li>5050 Prepare, mail, and ship initial materials.</li> </ul>   | Support Co. Part. | Support Co. Part. | NA              | NA          | NA          | 50      | 11/25/11        | 11/25/11   |          |                        |
| <p><b>Consolidation Days &amp; Post-Consolidation (Subject to Work Items for Consolidation &amp; Consolidation + 30 Days)</b></p> <p>Note: Consolidation will be in Three Phases. Phase 1 will consist of two steps with the first step being the worst of calls for one existing site with low risk in validated all systems, print servers, resources are performing as priority. Step 2 will be a few weeks later and consist of the balance of approximately 800,000 customers. For exact customer transfers will be determined as part of the consolidation plan. The remaining and branding of resources will be not in time for all phases. Phases 3 &amp; 4 will reduced calls from multiple centers as a result in the detailed implementation plan.</p> |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 5100 Consolidate  | <ul style="list-style-type: none"> <li>5110 Review Consolidation Plan, Sites &amp; Resources</li> <li>5120 Checklist</li> <li>5130 Organize Consolidation, Resources, Facilities for Target</li> <li>5140 &amp; 5150 Facility Preparation</li> <li>5160 Develop Consolidation Plan/Backup Strategy</li> <li>5170 Communicate Consolidation Plan, Back-up Strategy</li> <li>5180 Train &amp; Educate Employees</li> <li>5190 Confirm support, Partner Availability for Consolidation</li> <li>5200 Communicate New Call Center, Zone, Number &amp; Resources</li> <li>5210 Address and mitigate Customer Partners</li> <li>5220 Begin Branding Phase 1 Step 1, Current Site Call</li> <li>5230 Begin Branding Phase 1 Step 2, Current Site Call</li> <li>5240 Begin Branding Phase 1 Step 3, Current Site Call</li> <li>5250 Review unavailability of staff</li> </ul> | Support Co. Part. | Support Co. Part. | NA              | NA          | NA          | 51      | 11/25/11        | 11/25/11   |          |                        |
| 5200 Post Consolidation   | <ul style="list-style-type: none"> <li>5210 Post-Consolidation Review</li> <li>5220 Post-Consolidation Review Report</li> </ul>   | Support Co. Part. | Support Co. Part. | NA              | NA          | NA          | 52      | 11/25/11        | 11/25/11   |          |                        |
| <p><b>Implementation Phase 2 &amp; 3 Phase 2, 2.5 months and Phase 3 (1.5 months)</b></p> <p>Note: Dates are listed in Phase order with Phase 2 dates first and Phase 3 dates second. Additionally, (Phase 3) task numbers started begin with 6000.</p>   |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 6000 Review Opportunities & MSA Enhancement   |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 6200 Deploy Additional Technology Deployment  |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 6300 Test Systems & Telecommunications  |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 6400 Technical Help   |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 6500 Train  |   |                   |                   |                 |             |             |         |                 |            |          |                        |
| 6600 Prepare Next Site Consolidation  |   |                   |                   |                 |             |             |         |                 |            |          |                        |

Detailed Existing Site Implementation Workplan

| Phase | Task Package | Tasks & Activities | Deliverable | Dependencies | Client Resources | Client Days | AC Resources | AC Days | Total Work Days | Start Date | End Date | % Complete | Comments & Assignments |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|-------|--------------|--------------------|-------------|--------------|------------------|-------------|--------------|---------|-----------------|------------|----------|------------|------------------------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| 3590  | 3590         | 3590               | 3590        | 3590         | 3590             | 3590        | 3590         | 3590    | 3590            | 3590       | 3590     | 3590       | 3590                   |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        |      |      |      |      |      |      |      |      |      |      |      |      | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |
| 3590  | 3590         | 3590               | 3590        | 3590         | 3590             | 3590        | 3590         | 3590    | 3590            | 3590       | 3590     | 3590       | 3590                   |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        |      |      |      |      |      |      |      |      |      |      |      |      | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
| 3590  | 3590         | 3590               | 3590        | 3590         | 3590             | 3590        | 3590         | 3590    | 3590            | 3590       | 3590     | 3590       | 3590                   |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |      |      |      |      |      |      |      |      |      |      |
| 3590  | 3590         | 3590               | 3590        | 3590         | 3590             | 3590        | 3590         | 3590    | 3590            | 3590       | 3590     | 3590       | 3590                   |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |      |      |      |      |      |      |      |      |      |      |
| 3590  | 3590         | 3590               | 3590        | 3590         | 3590             | 3590        | 3590         | 3590    | 3590            | 3590       | 3590     | 3590       | 3590                   |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |      |
|       |              |                    |             |              |                  |             |              |         |                 |            |          |            |                        | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 | 3590 |      |      |      |      |      |      |      |      |      |      |



### Assumptions

- Start date is 2/7/99 and ending date is 1/5/01 of project
- Not all systems use the same voice-mail, call center software, or IVR system
- State regulation may dictate certain different operating requirements in each state