

To: UC Programme Board Members **From:** Lara Sampson/Tim Carter
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cc:

Key events around the use of iWD to support Case Progression

Issue: *Log the key events surrounding the procurement and deployment of Genesys intelligent Workload Distribution (iWD) for UC case progression and ultimately the decision not to use it to support scaling.*

Recommendations/Decisions required:

- **For Information / below the line paper.**

Timing: *n/a*

Introduction

The purpose of this paper is to log the key events and associated rationale/key risks considered in the procurement and deployment of Genesys intelligent Workload Distribution (iWD) for UCFS case progression.

iWD was seen to provide a number of capabilities which it was felt would otherwise need to be built by the UCFS product team, and hence a way of reducing the backlog of work to be built.

The key events were:

1. **Aug-15 Vendor Selection:** Genesys iWD was chosen as part of a joint solution to meet UCFS case progression needs.
2. **Oct-15 MVP Integration Timelines:** Agreement to integrate Genesys iWD with UCFS as part of a Case Progression MVP for the end May 2016 to support national rollout of UC Full Service.
3. **Feb-16 License Purchase:** Purchase of Genesys iWD licences was approved along with professional services support and hosting costs needed to enable the Case progression MVP.
4. **Jul-16 MVP Complete / Case Progression backlog prioritisation:** MVP completed. Case Progression backlog agreed, and ownership of case progression transferred to UCFS team.
5. **Oct-16 Proof of Concept:** Genesys engaged to demonstrate how some of the key UCFS Case Progression backlog items would be supported using iWD.
6. **Mar-17 Stand-down iWD:** PDE agreement to stand-down the use of iWD and not to renew the maintenance agreement based on the results from Proof of Concept testing.

Summary

This paper has been brought to this meeting to log the key events surrounding the procurement and deployment of Genesys Intelligent Workload Distribution (iWD) for UC case progression. Given the resources applied to the project both in terms of time spent and costs to procure, this document is intended to provide some context around the timings of key events leading ultimately to the decision not to proceed to use it to support Case Progression needs for scaling.

In August 2015, UC Digital Service Centre was established to deliver key enablers for the national rollout of the UC Digital Service – including a strategic solution for case progression. iWD was selected as the best of 5 vendor solutions evaluated which were seen to provide a number of capabilities which it was felt would otherwise need to be built by the UCFS product team, and hence a way of reducing the backlog of work to be built.

By October 2015 considerable progress had been made by the joint feature team, which had been established to push forward case progression needs in support of the operational business. Given the rollout pressures at that time, and the likely timelines for building a strategic integration between UCFS and iWD, it was agreed to accelerate the development of an MVP integration by May 2016.

In February 2016 commercial arrangements were put in place to support the necessary licenses, infrastructure and professional services to build the MVP with a view to supporting the production rollout up until the expected completion of the NGCC platform in February 2017. It was planned that at that time the associated license costs would be migrated across to the PSNCC (NCGG) programme.

By July 2016 the MVP had been completed and a backlog of work had been agreed. The priority for case management features had reduced compared to other backlog items, and the requirement for Case Progression at scale had moved to October 2017. In addition the NGCC rollout dates had moved back from February to June 2017 and the service design for case progression had evolved, with a more detailed backlog of work having been established. Against this backdrop, in October 2016 Genesys were engaged to demonstrate how the backlog items could be supported using iWD in order to better understand the cost of building something against the costs of integration against 6 key user needs which had been identified.

Originally planned to finish by December 2016, this piece of work slipped to March 2017 due to vendor issues. Whilst iWD was found to be able to support all the needs, there was a heavy dependency on UCFS build to do so and it was felt that with similar development effort a more targeted solution could be developed which would better fit the needs. It was accepted that, whilst iWD might in the future form part of the strategic solution for UCFS to address, as yet unidentified, work allocation needs there was no benefit from continuing to use it to support national rollout. Hence in March 2017, it was decided not to renew the maintenance agreement and to decommission the MVP infrastructure saving in the order of £725k.

Summary Commercials – spend (Oct-2015 to Mar-2017)

Date	Amount	Notes
Oct-2015	£90k	Genesys Environment set up
Feb-2016	£270k	Professional Services – environment & approach
	£4m	2,000 Perpetual iWD licenses – looking to reuse these on NGCC platform, hence looking at options to shelve maintenance & support to enable this. Because the software licenses were procured for a proof of concept, for prudence, they were expensed in the year of purchase rather than being capitalised. Therefore, they have no financial value on the balance sheet that requires a write-down.
	£650k	Commitment for 12 months maintenance and support. This was paid monthly & not renewed from a UC perspective (see above)
Jun-2016	£420k	Hosting costs of £70k per month – Jun-2016 through Jan-2017. Cancelled in Jan-2016.
Jul-2016	£550k	Professional Services – MVP
Mar - 2017	£205k	Professional Services – proof of concept. This total includes £125k already invoiced plus circa £80k which BT are yet to invoice
Total	£6.2m	

Summary Commercials – savings (to Apr-2017)

Date	Amount	Notes
Feb-2017	£140k	2 months of hosting costs of £70k per month
	£60k	2 months of Technical Account Management costs
	£525k	Renewal of maintenance and support
Total	£725k	

Decision / Recommendation

- None - information only.

Annexes.

<p>Aug 2015 – Vendor Selection</p> <p>Context:</p> <ul style="list-style-type: none"> • UC Digital Service Centre was established to deliver key enablers for the national rollout of the UC Digital Service – one of which was to deliver a strategic solution for UC case progression so that work could be effectively distributed, cleared and managed at scale, as the rollout of UC Digital Service progressed. • DSC ran an extensive exercise to evaluate potential solutions to meet UC case progression needs in Aug-2015. 	
<p>Points to note:</p> <ul style="list-style-type: none"> • DSC SLT reviewed the evaluation of potential solutions to meet UC case progression needs. • DSC SLT endorsed a Joint Solution which included in-house build of 'to-do' functionality in UCDS to meet urgent operational needs, and for Genesys iWD to be integrated with UCDS to deliver a strategic workflow management solution which could operate at the scale required to underpin the national rollout of the UC Digital Service. 	<p>Summary Rationale:</p> <ul style="list-style-type: none"> • Five potential solutions were included in the evaluation exercise and assessed against the following criteria: Functional Requirements, Technology Requirements; Security Requirements and Commercial Requirements. • The potential solutions considered were Verint, Microsoft Dynamics, Genesys iWD, Re-use and In-House build. • A hybrid In-house and Genesys iWD solution was considered to deliver the best scalable solution for UC case progression across the range of evaluation criteria.
<p>Risks Considered:</p> <ul style="list-style-type: none"> • The risk that the commercial timelines associated with the purchase of Genesys Licences would adversely affect the timeframe within which UC could put a strategic solution in place. • The risk that UCDS and DSC in-house teams would not have the skills, capacity and capability to deliver both immediate and strategic needs for UC case progression. • The risk that Genesys iWD would not integrate with UCDS to enable the strategic solution to work. 	

<p>Oct-2015 MVP Integration Timelines</p> <p>Context:</p> <ul style="list-style-type: none"> • Digital Service Centre was seeking to baseline delivery plans for each of the key enablers it had been asked to deliver to enable national rollout of the UC Digital Service. • A Joint Features Team had been established with UCDS to take forward development of tactical solutions to enable basic case progression functionality to be delivered to ease operational pressures. • PDE considered how quickly Genesys iWD could be integrated with UCDS to build the ability to deliver at scale. 	
<p>Points to note:</p> <ul style="list-style-type: none"> • PDE considered the emerging pressures in UC Digital Service in managing 'to-do' workflows and the potential to bring forward DSC plans to deliver the strategic case progression solution. • PDE decided to ask DSC to accelerate plans to develop, configure and integrate Genesys iWD with UCDS, as part of a case progression Minimum Viable Product for the start of the UC Transition Phase in May 2016. 	<p>Summary Rationale:</p> <ul style="list-style-type: none"> • Options for delivering a more substantial strategic solution for case progression for UC from Nov 2016 was considered against an option develop, configure and integrate Genesys iWD with UCDS as part of a case progression MVP which could be continuously improved in live running. • Early integration via an MVP was considered to align much better with UCFS Agile methods and offered the prospect of delivering enhanced capabilities at scale, much earlier.
<p>Risks Considered:</p> <ul style="list-style-type: none"> • The risk that commercial arrangements would not be in place in time to enable delivery of an integrated Genesys iWD/UCDS solution for May 2016. • The risk of placing too much additional pressure on UCDS resources and capability, which was already stretched in delivering an agreed backlog of work for Transition Phase. • The risk that DSC Technology resources may not have the capability to deliver for May 2016. 	

<p>Feb-2016 License Purchase</p> <p>Context:</p> <ul style="list-style-type: none"> • UC Digital Service Centre had been commissioned to deliver a case progression MVP for UC, which required integration of Genesys iWD with the UCDS system. • Completing the commercial processes to secure the Genesys iWD licences, professional services support and hosting arrangements required to go-live with a UC case progression MVP from May 2016 was a key risk that PDE were helping to mitigate. 	
<p>Points to note:</p> <ul style="list-style-type: none"> • PDE considered the requirements for purchasing the Genesys iWD licences; professional services support and hosting needed for the UC case progression MVP. • PDE agreed to fund the costs for the UC case progression MVP to enable development, launch and continuous improvement in live service. • Funding covered case progression costs from March 2016 to migrating to PSNCC by February 2017. 	<p>Summary Rationale:</p> <ul style="list-style-type: none"> • Cost rationale for each the key components of the case progression MVP was set out and tested from technical, commercial and business perspectives at the meeting and agreed as robust. • An outline view of the total costs of ownership was also considered, as was the potential for the Genesys iWD licences purchased for the MVP to be carried over into PSNCC arrangements to offset the costs for the initial purchase of the licences.
<p>Risks Considered:</p> <ul style="list-style-type: none"> • The risk that Genesys iWD licence costs would not be offset against the costs for adding a Genesys iWD Service Line as part of the PSNCC contract arrangements. • The risk that Genesys iWD may not form part of the DWP strategic solution and be included in PSNCC. • The risk that UC Digital Service would be unable to operate at the scale required without integration with Genesys iWD from May-16. 	

<p>July-2016 MVP Complete / Case Progression backlog prioritisation</p> <p>Context:</p> <ul style="list-style-type: none"> • MVP integration between Genesys iWD and UCFS had been completed on time and a prioritized backlog of improvements to the MVP agreed with key stakeholders. • The priority for Case Progression backlog items was considered lower than other backlog items at the time and work was underway to further develop the service design to better inform the Case Progression backlog. • The need to have a Case Progression solution capable of scaling was delayed to October 2017 due to contention planning following summer budget measures. 	
<p>Points to note:</p> <ul style="list-style-type: none"> • Accountability for case progression was moved fully into the UC Full Service Team. • Case Progression backlog items were considered lower priority when compared to other backlog priorities. 	<p>Summary Rationale:</p> <ul style="list-style-type: none"> • The fact that scaling had been pushed back meant that there was a less urgent need to have a Case Progression solution. • Testing the extent to which Genesys iWD could deliver against the case progression backlog and compared to in-house alternative de-risked further Case Progression solution development.
<p>Risks Considered:</p> <ul style="list-style-type: none"> • Taking the opportunity to complete a Proof of Concept test could be undermined should case progression needs become a more urgent priority in delivering the UC Full Service. • The Case Progression design and Proof of Concept test were predicated upon the Case Management model and whole case management approach being a success in practice. 	

<p>Oct-2016 Proof of Concept</p>	
<p>Context:</p> <ul style="list-style-type: none"> • The service design for Case Progression had been further elaborated based on learning from sites delivering their UC Full Service. • We had greater confidence the Case Progression backlog for Proof of Concept testing reflected real user and service needs and secured Genesis specialist support to enable completion of testing activity. 	
<p>Points to note:</p> <ul style="list-style-type: none"> • BDA/TDA agreed the scope of the Proof of Concept testing to consider benefits of using iWD for known Case Progression backlog items. • BDA/TDA also agreed it sensible to compare the cost/benefits of the solutions offered by Genesys iWD against the in-house alternative • The 6 key user needs for testing were agreed as critical for UC Full Service in delivering the overall case management approach at scale. 	<p>Summary Rationale:</p> <ul style="list-style-type: none"> • It had become clear that the UCFS "whole case" approach to case management meant the majority of work required on any case would ideally be done by either the Work Coach or Case Manager. • iWD by default works at a task level, so the proof of concept would allow us to get a better understanding of how it could best be used to support the desired case progression model without committing to further integration work.
<p>Risks Considered:</p> <ul style="list-style-type: none"> • The risk that the Proof of Concept may not get completed in time to complete the integration work needed for UC scaling should the need for Genesys iWD be confirmed. • The risk that the Proof of Concept might rule out any value in using Genesys iWD to meet Case Progression user needs, only for more to arise as the service moved towards Multi/Omni-channel delivery. 	

<p>Mar-2017 Stand-down Genesys iWD</p>	
<p>Context:</p> <ul style="list-style-type: none"> • The Proof of Concept testing was successfully completed and the methodology outcomes shared with key stakeholders from across the programme. • Proof of Concept testing methodology and outcomes were also considered in detail at TDA/BDA prior to making formal recommendations to PDE. 	
<p>Points to note:</p> <ul style="list-style-type: none"> • PDE reviewed Case Progression needs and an improvement roadmap up until the end of the year. • PDE agreed no further activity should be undertaken with iWD to meet case progression needs for scaling as they could be better met by in-house development. • PDE agreed that the annual maintenance contract for iWD would not be renewed. 	<p>Summary Rationale:</p> <ul style="list-style-type: none"> • Proof of concept findings showed that delivering Case Progression user needs for scaling would take longer and be more expensive if iWD formed part of an integrated solution with UCFS. • Genesys iWD was dependent on integration with UCFS to meet user needs. • In-house delivery of user needs could be completed more quickly and efficiently if there was no requirement to integrate with iWD.
<p>Risks Considered:</p> <ul style="list-style-type: none"> • It was accepted that Genesys iWD may form part of the strategic solution in the future as the UCFS Case Progression model evolves, and/or omni-channel needs emerge. Under this circumstance, there is a risk that the interim maintenance costs for the iWD licenses would need to be paid for the intervening period. • There is a risk that the perpetual licenses purchased for the MVP solution may not be something which can be migrated for use more widely across the department through the NGCC Programme. 	

