Service Description: Unified Contact Center Optimization Service

This document describes Unified Contact Center Optimization Service.

Related Documents: This document should be read in conjunction with the following documents also posted at www.cisco.com/go/servicedescriptions/ : (1) Glossary of Terms; (2) List of Services Not Covered; and (3) Severity and Escalation Guidelines. All capitalized terms in this description have the meaning ascribed to them in the Glossary of Terms.

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Service Summary

Unified Contact Center Optimization Service provides Architecture Design Review, Change Support, Incident Management, Software Risk Analysis, Software Recommendation Review, Stability Audit, Capacity Planning, Script Design Review, Custom Report Development, Business Management Transformation, Business Management Transformation Health Check, Operations Support Review, Operation Support Health Check, and Knowledge Transfer services in support of Cisco's family of Unified Contact Center products. The Unified Contact Center products covered in this service include Unified Contact Center Enterprise/Host Editions (UCCE/UCCH), Unified Contact Center ICM (UICM), Unified Customer Voice Portal (UCVP), Unified Interactive Voice Response (IP-IVR), and Cisco Unified Intelligent Center (CUIC) for Unified Contact Center report development. Cisco Network Infrastructure and Unified Communications products are covered under separate service offerings.

This Unified Contact Center Optimization Service is intended to supplement a current support agreement for Cisco products and is only available where all Product(s) in Customer's Network are supported by Cisco's Foundation Technology Optimization Service and/or Unified Communications Optimize Service. Cisco shall provide the Unified Contact Center Optimization Service described below as selected and detailed on the Purchase Order for which Cisco has been paid the appropriate fee. Cisco shall provide a Quote for Services ("Quote") setting out the extent of the Services and duration that Cisco shall provide such Services. Cisco shall receive a Purchase Order that references the Quote agreed upon between the parties and that, additionally, acknowledges and agrees to the terms contained therein.

The Unified Contact Center Optimization Service requires Customer to purchase a Cisco's Foundation Technology Optimization Service/NOS and/or Unified Communications Optimization Services. These services are the underlying foundation to support the Customer's Unified Contact Center voice and data network infrastructure.

Unified Contact Center Optimization Service

Cisco shall provide the Unified Contact Center Optimization Service during Standard Business Hours and remotely unless stated otherwise.

The Unified Contact Center Optimization Service is an advising and consultative offering to review Customer's currently installed and deployed Unified Contact Center solution. This Service does not address the design and development of scripts, call flows, custom applications and reporting and installation of any Cisco Certified Contact Center and third-party Products; these service offerings are only consultative service.

Cisco shall provide the following Unified Contact Center Project Manager activity for all Services quoted to the Customer under the Unified Contact Center Optimization Service. Services performed under this Service Description that are comparable to those services performed under Cisco's Foundation Technology Optimization Service/NOS and Unified Communications Optimization Service, and will

build upon the original service provided for Foundation Technology and will be focused on the specific technology described in this Service Description.

Unified Contact Center Project Manager

Designate a Unified Contact Center Project Manager to act as the primary interface with Customer for the Unified Contact Center Optimization Service. The Unified Contact Center Project Manager will designate contact center engineer(s) ("Cisco Services Engineer") to provide ongoing support, advice and guidance in connection with Cisco's Unified Contact Center technology and architecture issues. Project management activities as described below are provided as a part of any of the service elements selected under this Service Description.

Cisco Responsibilities

- Single point of contact for project managing Unified Contact Center Optimization Service related activities.
- Schedule/Coordinate Unified Contact Center project kick-off meeting (meeting delivered remotely).
- Project governance and project kick off presentation
- Create and review 90 day activity plan with the Customer.
- Review the program guidelines, deliverables, expectations and present project schedules and baseline project plan if created.
- Manage Cisco deliverables for Unified Contact Center Optimization related services.
- Establish a Customer-specific Cisco email alias to facilitate communication with Cisco Services engineer.
- Communicate Unified Contact Center activities updates on regular interval agreed upon by the Customer and Cisco.
- Schedule/Coordinate weekly/bi-weekly update calls and quarterly conference call meetings with Customer to review project status, deliverables and ongoing project planning (remote).

Customer Responsibilities

Customer shall provide the following:

- Designate project manager to coordinate activities with Cisco project manager and technical engineers.
- Schedule resources to attend meeting and assist Cisco when tasks require Customer support.
- Provide list of personnel for email distribution of information.
- Establish a rolling 90 day activity plan.
- Review all deliverables submitted by Cisco Project Manager.

UCC Architecture Design Review Service

The Unified Contact Center Architecture Design Review Service assesses the scalability of Unified Contact Center system and infrastructure architecture design requirements to address Customer's current and changing business goals. The Architecture Design Review Discovery session focuses on discussion of aligning business goals to current and future planning activities- introducing new technologies, efficiency and expansion changes and other related topics. The Architecture Design Review Workshop reviews the Customer's architecture design by identifying potential gaps, improvements and provides recommendations based on findings. These outcomes and findings are then documented and presented to the Customer in the Architecture Design Review Report. The Architecture Design Roadmap outlines a high level design roadmap that provides a blueprint to support the ongoing alignment of business and technology in the Customer's current and future planning activities.

Cisco Responsibilities

- Conduct kick off meeting with Customer to review the information required to perform the Architecture Design Review analysis.
- Request the following documents from Customer
    - Current architectural design,

- Network topology,
- Contact center as built documents, and any additional documentation and materials requested by Cisco

- Conduct UCC Architecture Design Discovery session as a remote session, up to 8 hours to address:
  - Review of Customer's design requirements based on priorities and goals.
  - Discuss planned changes to the current Unified Contact Center infrastructure.
  - Discuss the impact of new requirements on existing contact center
- Analyze gathered documentation and the information collected during the Architecture Design Discovery Session
- Conduct UCC Architecture Design Review workshop (remote/up to 4 hours) to review findings.
- Present findings and recommendations in the Architecture Design Review Report and Architecture Design Roadmap to the Customer.

    - **Deliverable:** Architecture Design Review Document with Roadmap Plan

Customer Responsibilities
Customer shall provide the following:

- Low level design document describing how the Customer's Contact Center system and solutions were built and engineered to meet a specific set of technical requirements and design goals.
- Ensure key detailed design stakeholders and decision-makers are available to participate during the course of the service.
- Current network topology (contact center and telephony components and network infrastructure).
- Extract information defined by Cisco required in conducting the architecture analysis
- Schedule the Architecture Discovery Session and Architecture Design Workshop with the appropriate personnel.
- Documentation defining Customer's business goals, objectives, key performance indicators, technical requirements related to architecture design planning.
- Understand that the Architecture Review will be performed remotely.
- Understands and acknowledges that the following are not covered or a part of the Architecture Review service:
  - Network and Unified Communication hardware, software and network architectures.
  - Call Routing/Admin Script review.
  - Customization and development of Agent Desktop.
  - UICM call flow configuration (software application).

Unified Contact Center Software Recommendation Review Service

The Unified Contact Center Software Recommendation Review Service engages Cisco engineers to review the Customer's current Unified Contact Center Software Release levels and the potential impact when planning changes to the Unified Contact Center environment. This service includes a software audit that recommends software updates and/or patches based on bug scrubs, open TAC cases, field notices and security advisories. The Unified Contact Center Software Recommendation Review service will examine new Software Releases and evaluate interdependencies between contact center components, and identify potential risks and challenges involved in recommended Unified Contact software changes. This service will provide the Customer the ongoing review of major Unified Contact Center issues such as end of life and end of sale Software Releases. Cisco will review Customer's Unified Contact Center Software Release update implementation plan and contingency planning to provide recommendations based on leading practices. This service will perform analysis of how notifications will impact the Customer's Unified Contact Center environment.

Cisco Responsibilities

- Schedule remote kick off meeting with the Customer to discuss the Software Recommendation Review process.
- Obtain from Customer the following information:
  - Current Software Release and hardware version for Unified Contact Center solution components (for example, UCCE, UICM, UCVP).

  - High-level design document or architectural drawing that identifies location of contact center components.
  - Configuration description for each of the key components.
  - Detailed requirements of the Customer's Contact Center Solution that include but are not limited to scalability, security and manageability.
  - Solution roadmap that may include but is not limited to new service details and network location changes.
  - Information on Customer business and technical requirements for new Contact Center Software releases.
  - Customer certification process and/or lab testing process.
  - Customer change control process.
- Review existing Unified Contact Center Software releases related to the Customer's Unified Contact Center solution.
- Conduct Unified Contact Center Software Release Discovery Session.
- Identify and recommend applicable Cisco Unified Contact Center Software Releases that address Customer's current feature and functional requirements.
- Review Customer's Software Release
- For any outstanding issues remotely review point releases or patches to address:
  - Bug scrub
  - Review Customer's open (CC) TAC cases related to the outstanding issue(s)
  - Field notices
  - Security advisories
- Evaluate and report on risks and challenges involved in recommended software changes.
- Evaluate interdependencies between contact center components and configuration.
- Review Customer's contingency plan for transitioning the Customer's current Software to new Unified Contact Center Software updates.
- Provide Software Release summaries to Customer via email distribution on the following:
  - Recent Software Releases related to the Customer's Cisco Unified Contact Center solution and provide update recommendations
  - Major Unified Contact Center announcements such as end of life and end of sale Software releases
  - Provide guidance and recommendation about field notices and security advisories related to Customer environment as required
  - End of sale/end of life and Software Release announcements reviewed on a regular basis.
- Conduct the Software Recommendation Release Workshop to review assessment findings and present recommendations.
- Present Software Recommendation Release Report.

    - **Deliverable: Software Recommendation Release Report**

Customer Responsibilities

Customer shall provide the following:

- Schedule a remote kick off meeting with Cisco and Customer technical support personnel responsible for Software Release administration.
- Current Software Release and hardware versions for Unified Contact Center solution components (for example, UCCE, UICM, UCVP,).
- High-level architectural drawing that shows where components are located (for example, geographical location or location within the Network).

- High-level design document or architectural drawing that identifies location of contact center components.
- Remote access to network devices related to the issue.
- Notify Cisco of any new service and Unified Contact network changes.
- Schedule participants for the remote Unified Contact Center Software Release Discovery Session.
- Customer understands the following areas are not covered within Software Recommendation service:
    - Unified Communication hardware and network architecture.
    - Operating System support.
    - Operating System compatibility beyond solution as documented in Cisco's hardware and system software specification (Bill of Materials) for Cisco Unified ICM/IPCC Enterprise and Hosted Editions.
- Schedule the remote Software Recommendation Release Workshop to review audit findings and present Software Recommendation Report.

Unified Contact Center Software Risk Analysis

The Unified Contact Center Software Risk Analysis service includes a proactive analysis of software defects, security advisories (PSIRTs), Maintenance Releases, and engineering specials (ESs) that Cisco generates when issues are uncovered that may impact the Cisco Unified Contact Center product suite. The notifications include recommended action to repair and/or protect the affected components from these issues. Cisco will provide an analysis of known defects and their resolution with regard to its possible impact on the Customer's Unified Contact Center solutions. If a solution is provided with the notification, it will be analyzed relative to the Customer's UCC environment.

Cisco Responsibilities

- Performing analysis of how known defects may impact the Customer's Unified Contact Center solution.
- Depending on the proposed resolution, Cisco Services Engineer may:
    - Help the Customer with recommendations on appropriate testing approach.
    - Review similar environments and correlate features and code.
        - **Deliverable:** Software Risk Analysis Updates

Customer Responsibilities

Customer shall provide the following:

- Provide details of current Software release and Hardware version for Unified Contact Center solution components (for example, Unified Contact Center Enterprise (UCCE) system and peripheral gateways).
- Provide high-level architectural drawing that shows where components are located (for example, geographical location or location within the Network).
- Provide current and new feature/functionality and capability requirements including the initial UCC design requirements documents.
- Resources as needed
- Reviews proposed solution or workaround for the Customer's issues and approve Customer support organization to implement change.
    - Provides onsite/remote access to network devices related to the issue.
    - Provides the Cisco engineer with any relevant information.
    - Service will be delivered remotely.
- Customer understands and acknowledges that the following are not provided or a part of the Software Recommendation service:
    - Unified Communication hardware and network architecture.
    - Operating System support.
    - Operating System compatibility beyond solution as documented in Cisco's hardware and system software specification (bill of materials) for Cisco Unified ICM/IPCC Enterprise and Hosted Editions.

- Strategic planning for major Software Releases and upgrades.

Unified Contact Center System Audit

Unified Contact Center System Audit Service examines the Customer's current Unified Contact Center system and examines the Unified Contact Center application configuration and design, including agent, agent desk setting, skill groups and translation routes. This service audits the Customer's existing contact center infrastructure to establish a framework to help with planning current and future changes to the Unified Contact Center environment. The Unified Contact Center System Audit Discovery session focuses on system and application effectiveness based on business imperatives/requirements, potential contact center changes and the impact of these changes to the current Unified Contact Center environment. The UCC System Audit Workshop reviews the findings of the system and application audit, identifies gaps, and provides recommendation of changes to optimize the Customer's current Unified Contact Center solution.

Cisco Responsibilities

- Request system and application configuration related documentation from the Customer.
- Conduct a System Audit Discovery Session (remote/up to 4 hours).
  - Understand Customer's business goals may impact changing the current system.
  - Current challenges.
  - Application changes (planned and already done).
  - Potential impact to current architecture/ capacities.
    - Risk identification
    - Availability/Stability issues (which may be related to application configuration).
  - Review with Customer sites included in the system audit.
- Discuss the server, domain and Cisco Support Tools loading requirements on the Customer provided server. If Customer has a Cisco Support Tool Server in place, no additional server will be required.
- Provide guidelines for system settings required for successfully running audit tools.
- Schedule with the Customer deploying Data Collection Tools for conducting the audit(s).
- Obtain remote access to all Unified Contact Center servers.
- Document discovery session findings and conduct audit.
  - Current Unified Contact Center Enterprise system hardware/software components including Unified Customer Voice Portal (UCVP, IP IVR, Gatekeeper, and related Unified Communication Manager components
  - Agents, Desk Settings, Skill Groups, and translation route configuration
- Run performance monitoring tools on all Unified Contact Center servers.
- Gather data and document findings into UCC System Audit Report.
- Conduct UCC System Audit Review workshop (remote/up to 4 hours) to review findings.
- Present Unified Contact Center system audit findings, identify gaps and limitations, and provide recommendations in the Unified Contact Center System Audit Report.

    - **Deliverable: Unified Contact Center System Audit Report**

Customer Responsibilities

Customer shall provide the following:

- Schedule resources to attend an System Audit Discovery session (remote/up to 4 hours):
  - Identify business goals and requirements.

- Current challenges.
- Application changes (planned and already completed).
- Potential impact to current architecture/ capacities.
    - Risk identification.
    - Availability/Stability issues (which may be related to application configuration).

- Ensure key contact center design stakeholders and decision-makers are available to participate during the course of the service.
- Deploy Data Collection Tools for conducting the audit.
- Provide or extract additional information required to conduct analysis.
- Identify and provide documentation regarding site location, address and site contact information to Cisco.
- Prepare servers as required to allow for the successful running of data gathering tools.
- Provide Cisco the following:
    - Provide a dedicated server in a domain with Cisco Support Tools loaded for Cisco to conduct audit(s). If Customer has a Cisco Support Tool server in place, no additional server will be required.
    - Schedule with the Customer setup, testing and deploying of Data Collection Tools for conducting the audit(s).
    - Provide remote access to all Unified Contact Center servers.
    - Current Unified Contact Center hardware/software information included in the audit-- Unified Customer Voice Portal. (UCVP), voice gateways, VXML gateways, IP IVR, Gatekeeper, etc.
    - Agents, Desk Settings, Skill Groups, and translation route etc.
    - Business and technical resources responsible for providing information to Cisco.
    - Any documentation related to future contact center planning.
    - Administrators and developers of the Unified Contact Center applications related to agent, agent desk setting, skill groups, remote agents, and translation routes.
- Schedule resources to attend the Unified Contact Center System Audit Workshop to review findings.
- Customer understands that the Unified Contact Center System Audit will be performed remotely.
- Customer is aware that a server is defined as any system (virtual or physical) that runs a separate operating system.
- Customer understands that a Cisco Network and Unified Communication audit must have been performed within the last twelve months otherwise these audits must be performed to ensure Unified Contact Center supportability.
- Customer understands that any upgrades performed since the audit of the network and Unified Communication infrastructure will require new network or UC audits performed.
- Customer understands and acknowledges that the following are not covered or a part of the Unified System Audit service:
    - Unified Communication capacity planning (UCM, Gateways, etc.).
    - Performance monitoring of Cisco Unified CallManager and related products.
    - 3rd party application integration.
    - Unified Communications components (UCM, Gateways, Unity, Telepresence, etc.) not related to contact center.
    - LAN/WAN infrastructure
    - Call routing logic
    - Script Review
    - Knowledge transfer
    - Report validation

- 3rd party integration and products

Unified Contact Center Scripting Design Review Service

Unified Contact Center Scripting Design Review examines a subset of representative Unified Contact Center scripts (maximum of 12) mutually agreed with the Customer for script design review. This service will identify and document inefficiencies in design, script flows outside of leading practices, and assist in script consistency and repeatable standards. The Unified Contact Center Script Design Workshop provides a technical working session to discuss ways to approach script development and create examples of implementing script review recommendations.

Cisco Responsibilities

- Discuss with the Customer the scripts to be reviewed.
- Script review, consisting of:
  - Review the pre-determined scripts identified by the Customers.
  - Perform a script review of Customer identified scripts and provide recommendations.
    - Identify methodologies that conflict with leading practices and outline recommendations.
    - Identify where scripts may be changed to improve efficiency in script administration.
    - Review Customer scripts for consistency and alignment to repeatable standards.
- Analyze and document findings in the Script Design Review Report.
- Schedule Script Design Review workshop to discuss findings and recommendations (remote/up to 8 hours)
- Present Script Design Review Report to the Customer
- Conduct Script Design Review Workshop.
  - Present standardized script design strategies across applications and across enterprise.
  - Collaborate and plan implementation strategy for recommended script modifications.
  - Discussion may include:
    - Based on review findings.
    - Work to create example scripts.
    - Discuss script requirements related to specific reporting goals.
    - Whiteboard example scripts.

    - **Deliverable: Scripting Review Report**

Customer Responsibilities
Customer shall provide the following:

- Schedule scripting resources to attend the Script Design Review conference call.
- Identify to Cisco the scripts to be reviewed.
- Provide to Cisco the identified Unified Contact Center script documentation developed by both internal resources and third party vendors.
- Provide access to script library.
- Provide access to Customer/developer resource(s) to review the custom and third party script components that interact with standard scripting.
- Review findings and recommendations of the Script Design Review Report.
- Schedule scripting resources to attend Script Design Review Workshop.

- Customer understands that the Script Design Review will be performed remotely.
- Customer must select the specific scripts to be reviewed.
- Customer must have access to call routing script library and documentation.
- Customer understands and acknowledges that the following are not covered or a part of the Script Design Review service:
  - Script reviews and recommendations beyond the amount contracted.
  - Call Manager configuration.
  - TDM ACD configuration.
  - 3rd party applications, integrations, script objects (custom java, etc.).
  - Voice recognition and text to speech scripts (except built in).
  - Custom developed objects or code (Example: Custom Java code within UCVP Studio script).
  - Reconciling of report data.
  - Troubleshooting and escalation for TAC issues related to scripting

Unified Contact Center Reports Package Service

The Unified Contact Center Reports Package provides Unified Contact Center Enterprise Customers with the planning, design, development, testing and implementation of Customer-definable reports. This includes a Reports Discovery session for gathering requirements in order to design and develop a set of reports and views which meet the Customer's business needs. Customers will work with an experienced Cisco Services Engineer, skilled in contact center reporting metrics, database schemas, reporting platforms like Cisco Unified Intelligence Center (CUIC), SQL (Structured Query Language) and Cisco's development best practices. Unified Contact Center Reports will provide a knowledge transfer session to train Customer's support staff on the ongoing management of generating reports. Up to (3) reports will be delivered as part of this package.

Cisco Responsibilities

- Verify with the Customer the reporting solution and related hardware platform has been implemented and functioning.
- Conduct Reporting Discovery Session with Customer personnel responsible for developing Unified Contact Center Reports.
- Develop reports based on Customer requirements.
- Conduct Report Testing.
  - Test whether the report(s) is generated with correct format and data.
  - Test the performance of report.
  - Load the custom reports into the Customer's production environment
- Conduct a knowledge transfer with Customer or partner team, system administrators.
  - Maximum of (3) days of workshops and training for up to eight participants to address product overview, advanced reporting/custom reports in Cisco Unified Intelligence Center (CUIC).
    - **Deliverable: (3) Unified Contact Center Reports**

Customer Responsibilities
Customer shall provide the following:

- Remote access to reporting platforms, software implementation, Historical Database Server and Cisco Unified Intelligence Center (CUIC).
- Cisco access to Customer resources responsible for the management and support of contact center reports
- Documented requirements of layout and data required
- Customer understands that the report packages will be performed remotely.

- Customer understands that Cisco Unified Intelligence Center reporting platforms and Historical Database Server/Detailed Data Server must be installed and functioning.
- Customer understands that Cisco Unified Contact Center reporting with third party contact center systems requires Cisco Unified Intelligence Center (CUIC) adapter installed.
- Access to call routing script library and documentation.
- Understands and acknowledges that Cisco will not perform troubleshooting on any existing reports.

Unified Contact Center Change Support Service

The Unified Contact Center Change Support provides remote assistance to Customer to prepare for pre-scheduled change management windows to include best-practice recommendations for changes to the UCC (Unified Contact Center) environment that Customer elects to perform. No onsite assistance is provided under the UCC Change Support and any request to perform such is subject to Cisco's sole discretion and Customer will responsible for any costs associated with such onsite visit.

Cisco Responsibilities

- Review Method of Procedure (MOP) documents prepared by Customer.
- Provide recommended changes to the MOP based on best practices for implementing, testing and/or backing out the planned change.
- Participate in any post-change reviews or post mortems to assist with the continuous improvement of Customer's change management process.

Customer Responsibilities

Customer shall provide the following:

- Prepare the MOP document which will include the steps required to prepare for, execute, test and back out the change.
- Participate in a collaborative review of the MOP with the Cisco engineer
- Schedule, commit resources for, and execute the planned change.
- Conduct post-change review.
- Service will be delivered remotely.
- Customer understands that the Change Support Service will be performed remotely and Cisco Services Engineer will work cases during Standard Business Hours.

Unified Contact Center Incident Management Support Service

The Unified Contact Center Incident Management Support Service provides assistance with Cisco TAC escalations related to the Customer's Unified Contact Center Solution. The Cisco project manager will assign a Cisco Services Engineer to review the documented open events and cases with the TAC organization, track to resolution, while keeping Customer apprised of the progress and document findings including root cause analysis and recommendations. Customer must open a trouble ticket through Cisco TAC. Customer should notify the Cisco engineer of the specific trouble ticket to track.

Cisco Responsibilities

- Provide TAC Escalation assistance after the Customer follows the proper TAC procedures and proper escalation process.
- Collaborate with Cisco TAC regarding the Customer's Unified Contact Center environment to assist Cisco TAC and the Cisco Contact Center Business Unit (CCBU) in resolving the incident.
- The project manager will assign a Cisco Services engineer to remotely track and help with the resolution of the issue(s) related Unified Contact Center components only.
- The Cisco Services engineer will provide remote support to Customer in dealing with open P1 and P2 cases. The Advanced Service engineer will monitor, assist and escalate when necessary to help resolve these issues. Cisco TAC is responsible for the case.

Customer Responsibilities

Customer shall provide the following:

- Users contacting the Customer's support desk or resolution center for assistance in connection with their Unified Contact Center Network or service problems or issues.
- Open a ticket with Cisco Technical Assistance Center and Cisco TAC has performed diagnostics prior to contacting Cisco Services for support.
- Notification to Cisco Service of the open ticket needing assistance and provide Cisco TAC case number
- Customer shall not escalate any Unified Contact Center problems or issues until Cisco TAC has performed diagnostics.
- Customer understands that the Incident Management Support Service will be performed remotely and Cisco Services Engineer will work cases during Standard Business Hours.
- Customer understands and acknowledges that the following are not provided or a part of the Incident Management Support Service:
    - Cisco Services Engineer does not make any changes to the Customer production environment.
    - P3/P4 TAC cases.
    - Onsite presence for TAC case support
    - Incident Management Support does not replace Cisco TAC Support services.

Unified Contact Center Capacity Planning Service

The Unified Contact Center Capacity Planning Service establishes a contact center system baseline and analyzes the impact of growth to the current Unified Contact Center system configuration, capacity performance and licensing on the Customer's Unified Contact Center system. Unified Contact Center Capacity Planning identifies the impact call profiles and call volumes have on the system capacity and recommends remediation to bring capacities into compliance with Cisco guidelines. The Unified Contact Center Capacity Planning Discovery session includes discussion about current and future capacity requirements, business goals that may impact capacity planning, call profile, call volume, configuration balancing and software licensing.

Cisco Responsibilities

- Schedule and perform a Unified Contact Center system capacity assessment.
- Request capacity configuration information from the Customer.
- Request documents related to Customer's current and future expansion plans.
- Obtain from Customer documents related to Unified Contact Center licenses purchased for each Unified Contact Center products.
- Compare Unified Contact Center configuration and utilization to Customer licensing.
- Schedule and conduct a Unified Contact Center Capacity Planning Discovery Session.
    - Discuss business goals and objectives related to Unified Contact Center systems.
    - Discuss the impact of changes in growth/downsizing on capacity requirements.
    - Discuss any planned changes in current business model.
    - Discuss with the Customer any issues related to capacity.
- Determine capacity requirements of all UCC servers/components.
    - Current system sizing.
    - Future growth as defined during the Unified Contact Center Capacity Discovery session
- Analyze and document data gathered.
- Conduct Capacity Planning Workshop and present Capacity Planning Report findings and recommendations to the Customer.

- **Deliverable: Unified Contact Center Capacity Planning Report**

Customer Responsibilities
Customer shall provide the following:

- Submit capacity and license related information to Cisco.
- Schedule Capacity Planning Discovery session with the technical resources responsible for supporting the Unified Contact Center system and Unified CallManager related components.
- Documents related to growth, changes and business planning to Cisco.
- Contact Center capacity and traffic requirements to Cisco-- agent count, busy hour call activity (BHCA), queue ports, self service ports, voice gateway ports, etc.
- Access to business and technical resources.
- Provide remote access to all Unified Contact Center servers and Unified CallManager related servers.
- Schedule the Capacity Planning Workshop to review Capacity Planning Report findings and recommendations.
- Customer understands that the Capacity Planning will be performed remotely.
- Customer understands and acknowledges that the following are not provided or a part of the Capacity Planning service:
  - Unified Communication capacity planning (UCM, Gateways, etc.).Performance monitoring of Cisco Unified CallManager and related products.
  - Third party application integration

Unified Contact Center Management Transformation Service - Evaluation

The Unified Contact Center Business Management Transformation Service helps Customers align their contact center strategy with organization goals and objectives. This service provides a discovery process that focuses on the Customer's contact center organizational and technology effectiveness. The service delivers a graphical and baseline analysis of the Customer's contact center business and management operational environment. Cisco shall provide consulting services for the Unified Contact Center Business Management Transformation Service by utilizing the Cisco maturity model to analyze the Customer's business management activities including processes, metrics, reporting and technology applications in order to establish a maturity level baseline. This evaluation will place the Customer's contact center into one of five levels of maturity, to include a baseline assessment against six strategic contact center elements.

Cisco Responsibilities

- Provide Strategic Evaluation Model requirements kick-off meeting and identification of types of attendees who are required to attend the virtual kick-off meeting.
- Develop preparation materials for and conduct the kick off meeting to discuss the discovery process.
- Identify and agree with Customer on the personnel who are necessary to participate in the data gathering by the Customer.
- Agree with Customer on up to three (3) business models for Cisco to evaluate which shall be documented during the kick off meeting.
- Provide the Customer with the questionnaires to be completed for the identified business models. Upon receipt of the questionnaires from the Customer, conduct a remote meeting to review the data compiled.
- Perform an analysis in accordance with Cisco maturity model of the Customer's data to develop the Strategic Evaluation Model Report, consisting of baseline findings and review the Strategic Evaluation Model Report with Customer.
- Services provided are consulting services comprised of advice assistance and guidance only.
- Provide to the Customer the Strategic Evaluation Model Report via a virtual meeting.
  - **Deliverable: Unified Contact Center Business Management Transformation Strategic Evaluation Report**

Customer Responsibilities
Customer shall provide the following:

- Identify Customer's executive sponsor(s) and key stakeholder(s) and define their roles in supporting this project.

- Assist Cisco in the coordination of the kick-off and ensure the executive sponsor(s),and key stakeholder(s), which may include the contact center management vice-president, director(s), manager(s), administrator(s), supervisor(s), human resources, business analyst(s), metrics analyst(s), IT and telecom management and any other personnel related to the management and support activities of the Customer's contact center solution, shall attend those scheduled meetings.
- Discuss business plans describing the goals, objectives, growth, and metrics guidelines related to the overall contact center solution for input into the data gathering process. Identify and agree with Cisco on up to three (3) business models during the kick-off meeting.
- Key Performance Indicators (KPIs), short and long term roadmap, metrics, benchmarks and all other necessary documents requested by Cisco to enable Cisco to evaluate Customer's business models.
- Review the Strategic Evaluation Model Report with Cisco for comment before it is formally completed and released.
- The Customer should review the Strategic Evaluation Model Report to validate the data provided to Cisco has been entered in the model.

Unified Contact Center Business Management Transformation Health Check Service

Unified Contact Center Business Management Transformation Health Check provides a Customer the opportunity for a Business Management Transformation review of the projects and initiatives completed during the deployment phase. This Health Check reviews the benchmarks, key performance indicators and business process changes established during the Business Management Transformation project and evaluate the change on the Customer contact center environment. The Business Management Transformation service will review the outstanding recommendations defined during the deployment phase to determine future requirements.

Cisco Responsibilities

- Schedule of Unified Contact Center Business Management Transformation review meeting with Customer.
- Review and document findings of benchmarks, key performance indicators and business process changes established during the Business Management Transformation project and evaluate the impact on the Customer contact center environment.
- Conduct Business Management Transformation Workshop to present findings and recommendations.
    - **Deliverable: Unified Contact Center Business Management Transformation Health Check Report**

Customer Responsibilities
Customer shall provide the following:

- Identify Customer's executive sponsor(s) and key stakeholder(s) and provide their roles in supporting this project.
- Provide Cisco information related to the benchmarks, key performance indicators and any business process changes since post deployment review.
- Schedule remote Business Management Transformation Workshop (up to 4 hours) to review findings and recommendations.

Unified Contact Center Operations Support Review Service

The Unified Contact Center Operations Support Review identifies the operational support activities and process required to manage a Cisco Unified Contact Center environment. The Operations Support Review assessment focuses on the following eleven operations processes: Day 2 activities, staffing and education, incident management, configuration management, availability management, service continuity management, change management, problem management, capacity management, service level management and service desk.

Cisco will conduct discovery, interview and workshop sessions with Customer's contact center support staff, operations process owners and other IT stakeholders to identify current contact Center support process and procedures. The Unified Contact Center Operations Support Review Assessment establishes an operations support maturity level of each of the eleven operations process based on Customer provide documentation and information gathered through the interview and workshop sessions. The Unified Contact Center Operations Support Document outlines gaps and recommendations to support a Unified Contact Center solution based upon a Customer's operational environment.

Cisco Responsibilities

- Contact Customer to identify the type of Customer personnel required to participate in the interviews and workshops.
- Schedule time to conduct meeting to review the Operations Support Questionnaire
- Send the Customer the Operations Support Questionnaire for completion and request specific documents required to assess Customer's operational readiness.
- Review Customer provided questionnaire and requested documentation and document preliminary findings.
- Conduct interviews with Customer's support organizations to obtain additional information required for preliminary Operations Support Review Assessment document.
- Conduct the Operations Support Review Workshop to review assessment findings and recommendations.
- Review Support Evaluation findings.
    - Discuss Customer's current operations processes and tools usage
    - Provide recommendations of key operations, engineering, tools, process requirements and discuss gaps identified to support a Unified Contact Center environment as well as options for Customer to support leading practices.
- Document the Unified Contact Center Operations Support Plan resulting from Operation Workshop findings as a framework to improve Customer's Unified Communications operational capabilities.
- Present and review the Unified Communications Operations Support Review findings with the Customer.

    - **Deliverable: Unified Contact Center Operation Support Review Report**

Customer Responsibilities
Customer shall provide the following:

- Schedule attendees for the pre-kick off conference call, Interview Sessions and Workshop.
- Collecting documentation and other Information collection as requested by Cisco.
- Completed Operations Support Questionnaire; identify key individuals who will participate in the pre-kick off conference call; identify support personnel to be interviewed; and identify key individuals who will attend the Operations Support Workshop.
- Review of the completed deliverable and recommended changes.
- Schedule a meeting with Cisco and Customer participating support personnel thirty (30) business days from presenting Operations Support Deliverable to review implemented changes as defined in the Operations Support Document.

Unified Contact Center Operations Support Health Check Service

Unified Contact Center Operation Support Review Health Check provides a Customer the opportunity to review original findings and assess changes to those recommendations. The Unified Contact Center Operations Support Review Health Check will evaluate the progress since the last review and outlines gaps and provide recommendations.

Cisco Responsibilities

- Schedule a virtual Unified Contact Center Operation Support Health Check Review meeting with Customer.
- Review findings of last review and determine areas the Customer improved support operation.
- Assess new documentation, process and procedures.
- Document and review findings with Customer.

    - **Deliverables:** Operation Support Review Health Check Report

Customer Responsibilities
Customer shall provide the following:

- Identify Customer's executive sponsor(s) and key stakeholder(s) and provide their roles in supporting this project.
- Provide Cisco information and documentation related to the changes since the last Operations Support Review.

- Review the Operation Support Review findings with Cisco.

Unified Contact Center Knowledge Transfer Service

The Unified Contact Center Knowledge Transfer Service provides educational "Whiteboard" sessions with a Cisco Services Engineer. This service will provide sessions related to the optimal use of the current system features and capabilities, administration and operational best practices, integration of Unified Contact Center components, high level discussion of 3rd party contact center applications, troubleshooting techniques and other topics as defined between Cisco and Customer.

Cisco Responsibilities

- Deliver high level "Whiteboard" technical sessions.
- Identify session subjects (UICM, UCVP, and IP IVR, see topics section) ahead of time, at Customer request and following Customer suggestions.
  - Use of current product features and capabilities.
  - Administration best practices.
  - Operational best practices.
  - Optimal use of new features and capabilities. Integration of Cisco Contact Center components.
- High level discussion of integration w/3rd party contact center applications.

Customer Responsibilities

Customer shall provide the following:

- Schedule Knowledge Transfer sessions with Cisco Unified Contact Center Project Manager at the beginning of each quarter.
- Coordinate with Cisco Unified Contact Center Project Manager on Knowledge Transfer topics covered during the transfer and mentoring session.
- Provide background information on the skill sets of the attendees.
- If applicable, schedule facilities and equipment required for each session.
- Provide Cisco Unified Contact Center Project Manager with not less than three (3) weeks prior notice of changing topic of session.
- Must provide Unified Contact Center Project Manager at least ten (10) days notice of cancellation or reschedule of training or mentoring session. No notice or less than ten (10) days notice will forfeit the session.
- Attendees should have knowledge of Unified Contact Center products related to the Customer's solution, such as CallManager, UICM, UCCE, UCVP, IP IVR and Studio.
- If required, participate in pre-knowledge transfer conference call(s) to enable Cisco to deliver a more focused and tailored session.
- The maximum number of students at any one time shall not exceed ten (10), unless mutually agreed upon by the Customer and Cisco.
- Customer understands that the Knowledge Transfer sessions will be performed remotely and IPT and CallManager discussions will be conducted only as relates directly to contact center solution.
- Customer understands and acknowledges that the following are not provided or a part of the Knowledge Transfer sessions:
  - These sessions will not include any Customer installed contact center third-party solutions.
  - Developer support of integrations.
  - Agent and supervisor training.

Cisco General Support

- The Unified Contact Center Optimization Service is an advising and consultative offering to review Customer's currently installed and deployed Unified Contact Center solution. This Service does not address the development of scripts, call flows, custom applications and installation of any Cisco Certified Contact Center and third-party Products; it is a consultative service only.

- Schedule with Customer up to five visits per year (not to exceed seven (7) days in aggregate) to Customer's site for the project kick off meeting and quarterly review sessions. Additional visits will be mutually agreed at Cisco's then-current travel and labor rates.

- Provide certain Data Collection Tools that Cisco identifies as appropriate for Unified Contact Center system data collection during the Term of the Services, provided that all fees due and owing to Cisco under this Appendix have been paid. Data collection tools may or may not include hardware or software. Customer acknowledges and agrees that Cisco shall retain full right, title and interest to the Data Collection Tools. In addition to Cisco provided tools, the Advanced Services engineer may utilize Customer provided data, scripts or internal tools to assist in collecting data from the Unified Contact Center system.

- UCC engineer may utilize Customer provided data, scripts or internal tools to assist in collecting data from the Customer operations environment.

Customer Responsibilities

- **General Responsibilities**
  - Ensures key stakeholders participation with business, engineering and operations personnel during kick off meetings, interviews, workshops and review of findings.
  - Provide access to Customer's network to allow the Cisco Services engineer to provide remote support.
  - Provide Access to all necessary information to enable Cisco to perform root cause analysis.
  - Allow Cisco remote accesses to Data Collection Tools installed as well as create a domain user, access to PC at Customer sites and domain and firewall information to allow capturing of data from the tools.
  - Allow services delivered remotely, if for security or other reasons, Customer does not allow installation of data tools, access to relevant databases and server and application configuration tools then Customer will be responsible for the additional costs related to perform these services onsite at specific sites or locations to perform these services.
  - Customer's technical assistance center shall maintain centralized network management for its contact center network supported under this Service Description, capable of providing Level 1 and Level 2 support.
  - Customer is responsible for any damage to or loss or theft of the Data Collection Tools while in Customer's custody. Customer must immediately return data collection tool(s) to Cisco as instructed by Cisco, upon the earlier of: (i) expiration or termination of the Service Description or (ii) Cisco's request to Customer that the data collection tool(s) is returned to Cisco.
  - In the event the Unified Contact Center composition is altered, after the Services selected in this Service Description are in effect, Customer is responsible to notify Cisco in writing within ten days (10) of the change. Cisco may require modifications to the fee if the Unified Contact Center composition has increased beyond the original pricing quote for Services (example: adding of sites and/or servers).
  - Retain overall responsibility for any business process impact and any process change implementations
  - Designated person(s) with instructions on process and procedure to initiate cases and access the Advanced Services project manager and engineer.
  - Provide notification to Cisco of its standard operating procedures related to its business practices, its internal operational nomenclature and network to allow Cisco to effectively communicate and discuss cases with Customer in the context of Customer's business environment.
  - Support Cisco team to collect needed information for performance and optimization services that may or may not use automated tools. Inform Cisco of Unified Communications-related projects and critical changes that may impact the Unified Contact Center solution that Customer has implemented.

- Provide Cisco with detailed information that describes Customer's requirements and objectives for its Contact Center network including but not limited to scalability, security and manageability, roadmap and changes, solution components such as hardware, quantity and Software Releases.