

Oakland County Department of Information Technology Project Scope and Approach

Project Name: Live Web Chat Assessment

Project ID: DE8187LC

Leadership Group: IT Steering Committee			
Department: Information Technology		Division: Application Services	
Project Sponsor: Ed Poisson	Date Requested: June 3, 2008	PM Customer No. 187	
Request Type:	<u><i>New Development</i></u>	<i>Enhancement</i>	<i>Customer Support</i>
	<i>Planned System Maintenance or Upgrade</i>		
IT Team Name: eGovernment Program Services		IT Team No: E	
Project Manager/Leader: Sandy Jaszczak			
Account Number: 30004	Account Description: IT - eGovernment	Customer Name:	IT - eGovernment
Grant Funded? Yes <u>No</u>	Mandate? Yes <u>No</u>	Mandate Source:	

Project Goal

To evaluate and make recommendations related to implementing a live chat function on www.OakGov.com so that real-time web site support may be offered during designated hours.

Business Objective

Improve service by providing a new method of interaction with visitors to the County's public Web site(s).

Major Deliverables

- Detailed Project Plan and Return on Investment
- Risk Management Plan
- Communication Plan
- Issue Logs
- Requirement Document
- Solution Analysis and Recommendation
- Live Chat Web Site Service
- Policies and Procedures
- Training
- Marketing and Promotion Plan
- Metrics Measurement Document

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Department of Information Technology
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Approach

- Gather and Document Live Chat requirements
- Evaluate solution alternatives based on requirements
- Conduct cost/benefit analysis of alternatives and recommend a solution
- Review/Send RFP based on requirements if required
- Review proposals, select, buy software
- Determine implementation sequence and phasing
- Develop and document policies and procedures
- Develop and implement Training Plan
- Develop and implement Support Plan
- Launch/implement live chat service on County web sites
- Develop/implement Marketing and Promotion Plan
- Create method of measuring results (e.g. increased use of search utility)
- Conduct results measurement

Benefits

See Return on Investment (ROI) Analysis Document

Benefits will be realized through increased customer satisfaction. A real-time live chat function would improve the usability of the County's public Web site, thereby increasing the value of the information and services provided online. In FY07 there were more than 2.6 million visitors to the County's public Web site. The implementation of Web-based customer support via Live Chat will enhance the online experience of visitors to the County's Web site(s), thereby increasing customer service quality.

Impact

Number of Users	More than 2.6 million visitors to County Web site(s) (FY07 total)
Divisions	ALL
Leadership Groups	ALL

Risk

Business Environment Medium – Project will require some changes to existing business processes.

Technical Environment High – New or nonstandard technology.

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Assumptions

Staffing IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

<u>Role:</u>	<u>Name</u>	<u>Hours per Day</u>
Project Sponsor:	Ed Poisson	As needed

Facilities

- No additional space or facility resources are required.

Technical

- This is an assessment phase; no new technology will be implemented in the scope of this project.

Funding

- Information Technology

Other

- N/A

Priority TBD

Constraints

- Resource Availability

Exclusions

- N/A

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PROJECT PHASE AUTHORIZATION

Phase(s): ALL		
Total Estimated Application Services	Hours: 316	Cost: \$38,551
Total Estimated Technical Systems	Hours: 24	Cost: \$2,929
Total Estimated CLEMIS	Hours:	Cost:
Total Estimated Internal Services	Hours:	Cost:
IT Application Services Division Manager Approval:		Date:
IT Technical Systems Division Manager Approval:		Date:
IT CLEMIS Division Manager Approval:		Date:
IT Internal Services Division Manager Approval:		Date:
IT Management Approval:		
Approved: Yes No		Date:
Reason:		
Project Sponsor Approval:		
Title:		Date:

PROJECT SUMMARY

Authorized Development (see above)	Hours:	Cost:
Preliminary Estimated Development for Future Phases	Hours: 340	Cost: \$41,480
Grand Total Estimated Development	Hours: 340	Cost: \$41,480

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PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

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Type	ID	Task Name	Estimate Hours	Estimate Cost	Estimate Notes
Phase	000000	<input type="checkbox"/> PROJECT MANAGEMENT	130	\$15,860.00	
Phase	200000	<input type="checkbox"/> WEB REVIEW AND PLANNING	210	\$25,620.00	
			340	\$41,480.00	

DE8187LC - Live Web Chat Assessment

3.1 - Provide an Enhanced Application Service Offering

- | | |
|---|---|
| 3.1.1 - Increase application integration through web services <input type="checkbox"/> | 3.1.5 - Improve the quality, reliability and availability of all applications <input type="checkbox"/> |
| 3.1.2 - Research and develop a Constituent Relationship Management (CRM) strategy <input type="checkbox"/> | 3.1.6 - Increase the agility and responsiveness of business units by expanding customer analytics <input type="checkbox"/> |
| 3.1.3 - Promote mobility and location integration in business applications <input type="checkbox"/> | 3.1.7 - Leverage the County's Internet presence and portal as a branded consolidated point of access to all County information and services through a web browser <input checked="" type="checkbox"/> |
| 3.1.4 - Utilize ecommerce platform to offset costs and expand product offerings to customers <input type="checkbox"/> | 3.1.8 - Centralize identity and access management for all applications and content <input type="checkbox"/> |

3.2 - Enhance ability to provide effective and timely customer (County departments and CVTs) service

- | | |
|---|--|
| 3.2.1 - Implement a centralized service center strategy to provide a single point of contact <input checked="" type="checkbox"/> | 3.2.4 - Provide a high-quality training program to empower employees through technology <input type="checkbox"/> |
| 3.2.2 - Implement the IT Infrastructure Library (ITIL) best practice framework for IT Service Management <input type="checkbox"/> | 3.2.5 - Develop a formalized customer communication plan <input checked="" type="checkbox"/> |
| 3.2.3 - Define a service and support strategy that clearly identifies the IT service provided <input type="checkbox"/> | 3.2.6 - Build IT Staff expertise through professional development <input type="checkbox"/> |
| | 3.2.7 - Expand capacity through ongoing organizational review and selective outsourcing <input type="checkbox"/> |

3.3 - Implement a Standardized Infrastructure Strategy

- | | |
|---|--|
| 3.3.1 - Deliver services using a shared technology infrastructure wherever possible <input type="checkbox"/> | 3.3.5 - Establish support cost model and SLA for all offerings outside 3.3.4 <input type="checkbox"/> |
| 3.3.2 - Implement a Microsoft infrastructure strategy <input type="checkbox"/> | 3.3.6 - Improve service availability through network design and management strategies <input type="checkbox"/> |
| 3.3.3 - Implement a consolidated security strategy <input type="checkbox"/> | 3.3.7 - Establish enhanced capacity planning and recovery management strategies <input type="checkbox"/> |
| 3.3.4 - Establish a standard personal computing hardware and software product suite, SLA, and replacement schedule for all County personal computers <input type="checkbox"/> | |

Oakland County -- Web Live Chat
Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	0	0	0	0	0	0	0
Cost Avoidance Subtotal:	0	0	0	0	0	0	0
Costs:							
Development Services Subtotal:	41,480	0	0	0	0	0	41,480
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	4,500	4,500	4,500	4,500	4,500	4,500	27,000
Infrastructure Subtotal:	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
Annual Statistics:							
Annual Total Savings	0	0	0	0	0	0	0
Annual Total Costs	45,980	4,500	4,500	4,500	4,500	4,500	68,480
Annual Return on Investment	(45,980)	(4,500)	(4,500)	(4,500)	(4,500)	(4,500)	(68,480)
Annual Costs/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Project Cumulative Statistics:							
Cumulative Total Savings	0	0	0	0	0	0	0
Cumulative Total Costs	45,980	50,480	54,980	59,480	63,980	68,480	68,480
Cumulative Return on Investment	(45,980)	(50,480)	(54,980)	(59,480)	(63,980)	(68,480)	(68,480)
Cumulative Cost/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
Signatures:							
Benefits Reviewed By Project Sponsor	Date: _____						
Costs (including IT Resources) Reviewed By Information Technology Project Manager	Date: _____						
Costs (including IT Resources) Reviewed By Technical Services Manager	Date: _____						

Oakland County -- Web Live Chat
Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Intangible: Improve Customer Service quality and Satisfaction						0	
Intangible: Improve the County Website's Usability thereby increasing the value of the information and services provided online						0	
Intangible: Humanize our web presence while improving accessibility						0	
Intangible: Directly support citizens online so that forms and applications are filled out correctly and speedily processed.						0	
Intangible: Reduce errors in completing forms and applications online.						0	
Intangible: Citizen time savings by allowing web patrons the ability to ask questions at that time of completing a form or application instead of calling, emailing, or coming in to County Offices receive clarification.						0	
Intangible: Enhanced Support: Provide citizen with links to webpages, graphics, charts, tables, driving directions, etc that are not possible or with a traditional support telephone call. Citizens can also print a copy of the conversation to review later.						0	
Intangible: Increased efficiency in Oakland County support personnel allowing them to multitask and assist several online visitors at the same time which reduces citizen hold times.						0	
Intangible: Increased effectiveness by allowing Oakland County support operators to have operator-to-operator chats and department-to-department chats for additional help.						0	

Oakland County -- Web Live Chat
Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Intangible: Time savings with the use of canned answers that provide instant responses to common questions. Answering such questions in a chat session typically faster than staff taking telephone call after telephone call, to answer the same questions and to transfer calls.						0	
Intangible: Increased Quality Control; Transcripts of all chat sessions may be automatically sent any email address. Information from these chats can be used for quality control purposes, training new staff members, and deciding which information needs to be added to the website. All chat transcripts are date and time stamped for verification purposes.						0	
						0	
						0	

Oakland County -- Web Live Chat
Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions				
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5
Intangible: Improve Customer Service quality and Satisfaction												
Intangible: Improve the County Website's Usability thereby increasing the value of the information and services provided online												
Intangible: Humanize our web presence while improving accessibility												
Intangible: Directly support citizens online so that forms and applications are filled out correctly and speedily processed.												
Intangible: Reduce errors in completing forms and applications online.												
Intangible: Citizen time savings by allowing web patrons the ability to ask questions at that time of completing a form or application instead of calling, emailing, or coming in to County Offices receive clarification.												
Intangible: Enhanced Support: Provide citizen with links to webpages, graphics, charts, tables, driving directions, etc that are not possible or with a traditional support telephone call. Citizens can also print a copy of the conversation to review later.												
Intangible: Increased efficiency in Oakland County support personnel allowing them to multitask and assist several online visitors at the same time which reduces citizen hold times.												
Intangible: Increased effectiveness by allowing Oakland County support operators to have operator-to-operator chats and department-to-department chats for additional help.												

Oakland County -- Web Live Chat
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Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	
Intangible: Time savings with the use of canned answers that provide instant responses to common questions. Answering such questions in a chat session typically faster than staff taking telephone call after telephone call, to answer the same questions and to transfer calls.													
Intangible: Increased Quality Control; Transcripts of all chat sessions may be automatically sent any email address. Information from these chats can be used for quality control purposes, training new staff members, and deciding which information needs to be added to the website. All chat transcripts are date and time stamped for verification purposes.													

Oakland County -- Web Live Chat
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Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
IT Hours - New Development	Development Svcs		EA	340	122	41,480		x							
IT Hours - System Maintenance	Development Svcs				122	0									
IT Hours - Customer Support	Development Svcs				122	0									
IT Hours - Planned Maintenance	Development Svcs				122	0									
User Hours - New Development	Development Svcs					0									
User Hours - PTNE/OT	Development Svcs					0									
Contractor Professional Services	Development Svcs					0									
PC System - Acquisition	Hardware				814	0									
PC System - Maintenance	Hardware				2,304	0									
Notebook - Acquisition	Hardware				1,223	0									
Notebook - Maintenance	Hardware				2,372	0									
Tablet Notebook - Acquisition	Hardware				2,012	0									
Tablet Notebook - Maintenance	Hardware					0									
Laserprinter - Acquisition	Hardware				1,432	0									
Laserprinter - Maintenance	Hardware				1,104	0									
Image Workstations - Acquisition	Hardware					0									
Image Workstations - Maintenance	Hardware				3,496	0									
PC Maintenance User Owned	Hardware				2,304	0									
Printer Maintenance User Owned	Hardware				1,072	0									
Package Software - Acquisition	Software					0									
Package Software - Maintenance	Software			1	4,500	4,500		x	x	x	x	x	x	x	
Business Objects Access	Software					0									
Term Emulation SFTW-Acquisition	Software					0									
Term Emulation SFTW-Maintenance	Software					0									
Server - Acquisition/Upgrade	Infrastructure				8,000	0									
Server - Maintenance	Infrastructure				360	0									
Server Sftwre - Acquisition/Upgrade	Infrastructure				335	0									
Server Sftwre - Maintenance	Infrastructure					0									
Server Rack Mount	Infrastructure				400	0									
Oracle Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure				21,372	0									
Oracle Enterprise Per Processor - Year 2 and Beyond	Infrastructure				3,432	0									

Oakland County -- Web Live Chat
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Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
MS SQL Server Standard Per Processor - Includes Year 1 Maintenance	Infrastructure				4,725	0									
MS SQL Server Standard Per Processor - Year 2 and Beyond	Infrastructure				946	0									
MS SQL Server Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure				19,693	0									
MS SQL Server Enterprise Per Processor - Year 2 and Beyond	Infrastructure				3,939	0									
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				3,506	0									
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				701	0									
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				13,180	0									
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				2,635	0									
SSL Certificate	Infrastructure				845	0									
TBD	Infrastructure					0									
TBD	Infrastructure					0									
TBD	Infrastructure					0									
TBD	Infrastructure					0									
Internet Access	Infrastructure				180	0									
Project Staff Training	Training					0									
User Training	Training					0									

Oakland County -- Web Live Chat
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs	41,480.00					
IT Hours - System Maintenance	Development Svcs						
IT Hours - Customer Support	Development Svcs						
IT Hours - Planned Maintenance	Development Svcs						
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs						
PC System - Acquisition	Hardware						
PC System - Maintenance	Hardware						
Notebook - Acquisition	Hardware						
Notebook - Maintenance	Hardware						
Tablet Notebook - Acquisition	Hardware						
Tablet Notebook - Maintenance	Hardware						
Laserprinter - Acquisition	Hardware						
Laserprinter - Maintenance	Hardware						
Image Workstations - Acquisition	Hardware						
Image Workstations - Maintenance	Hardware						
PC Maintenance User Owned	Hardware						
Printer Maintenance User Owned	Hardware						
Package Software - Acquisition	Software						
Package Software - Maintenance	Software	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00
Business Objects Access	Software						
Term Emulation SFTW-Acquisition	Software						
Term Emulation SFTW-Maintenance	Software						
Server - Acquisition/Upgrade	Infrastructure						
Server - Maintenance	Infrastructure						
Server Sftwre - Acquisition/Upgrade	Infrastructure						
Server Sftwre - Maintenance	Infrastructure						
Server Rack Mount	Infrastructure						
Oracle Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure						
Oracle Enterprise Per Processor - Year 2 and Beyond	Infrastructure						

Oakland County -- Web Live Chat
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Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
MS SQL Server Standard Per Processor - Includes Year 1 Maintenance	Infrastructure						
MS SQL Server Standard Per Processor - Year 2 and Beyond	Infrastructure						
MS SQL Server Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure						
MS SQL Server Enterprise Per Processor - Year 2 and Beyond	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
SSL Certificate	Infrastructure						
TBD	Infrastructure						
TBD	Infrastructure						
TBD	Infrastructure						
TBD	Infrastructure						
Internet Access	Infrastructure						
Project Staff Training	Training						
User Training	Training						

Oakland County -- Web Live Chat

Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	41,480						41,480
IT Hours - System Maintenance							
IT Hours - Customer Support							
IT Hours - Planned Maintenance							
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
<i>Development Services Subtotal:</i>	41,480						41,480
Hardware:							
<i>Hardware Subtotal:</i>							
Software:							
Package Software - Maintenance	4,500	4,500	4,500	4,500	4,500	4,500	27,000
<i>Software Subtotal:</i>	4,500	4,500	4,500	4,500	4,500	4,500	27,000
Infrastructure:							
<i>Infrastructure Subtotal</i>							
Training:							
<i>Training Subtotal:</i>							
Other:							
<i>Other Subtotal:</i>							
Costs Total:	45,980	4,500	4,500	4,500	4,500	4,500	68,480

Oakland County -- Web Live Chat

Return on Investment Analysis

Assumptions

Date	Assumption Description
02-Jun-08	\$4,500 annually -Live Chat service is priced on Concurrent operators. Range for pricing is \$15-\$99 per concurrent operator. Based on vendor conversations, an average 5-6 concurrent operators seems appropriate. For assumption purposes we used \$75/operator with 5 operators
02-Jun-08	Benefits:
	Improve Customer Service quality and Satisfaction
	Improve the County Website's Usability thereby increasing the value of the information and services provided online
	Humanize our web presence while improving accessibility
	Directly support citizens online so that forms and applications are filled out correctly and speedily processed.
	Reduce errors in completing forms and applications online.
	Citizen time savings by allowing web patrons the ability to ask questions at that time of completing a form or application instead of calling, emailing, or coming in to County Offices receive clarification.
	Enhanced Support: Provide citizen with links to webpages, graphics, charts, tables, driving directions, etc that are not possible or with a traditional support telephone call. Citizens can also print a copy of the conversation to review later.
	Increased efficiency in Oakland County support personnel allowing them to multitask and assist several online visitors at the same time which reduces citizen hold times.
	Increased effectiveness by allowing Oakland County support operators to have operator-to-operator chats and department-to-department chats for additional help.
	Time savings with the use of canned answers that provide instant responses to common questions. Answering such questions in a chat session typically faster than staff taking telephone call after telephone call, to answer the same questions and to transfer calls.
	Increased Quality Control : Transcripts of all chat sessions may be automatically sent any email address. Information from these chats can be used for quality control purposes, training new staff members, and deciding which information needs to be added to the website. All chat transcripts are date and time stamped for verification purposes.

Oakland County -- Web Live Chat
Return on Investment Analysis

Sheet2

Improve Customer Service quality and Satisfaction						
Improve the County Website's Usability thereby increasing the value of the information and services provided online						
Humanize our web presence while improving accessibility						
Directly support citizens online so that forms and applications are filled out correctly and speedily processed.						
Reduce errors in completing forms and applications online.						