

Project Documentation

**POST PROJECT EVALUATION DOCUMENT
(PPE)**

Replacement Telephony System Project

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Date:	17/04/2019
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Approved by:	Business Improvement Programme Board (24.04.2019)

Document History

Revision Date	Version	Summary of Changes	Reviewer(s)
16/04/2019	V0.1	Initial	
17/04/2019	V1.0	Amendments post review	
25/04/2019	V1.0	BIPB approval	

Consideration by the Corporate Improvement Team

Date	Reviewing Officer	Comments for Consideration
17/04/2019	Andy Buckley	Reviewed first draft, minor suggested changes added, including that explanation be provided regarding any slippage in the timeline

Approvals

Name of person, group or committee
Business Improvement Programme Board

Distribution

A final copy of the approved document will be distributed to:

Name	Job Title
Cabinet – major project	

1. PURPOSE OF DOCUMENT

This document provides a review of how the Replacement Telephony System Project performed against the original intentions set out in the Project Initiation Document (PID).

It allows lessons learned to be passed on to other projects and ensures that provisions have been made to address all open issues and risks alongside follow on actions and recommendations where appropriate.

It also provides the opportunity to assess any expected outcomes that have already been achieved and/or provide a review plan for those outcomes yet to be realised.

2. ORIGINAL PROJECT DESCRIPTION

This project was established to enable the replacement of the Council's (then) legacy telephone system (PBX) with a completely new infrastructure and technology: to maintain the Council's corporate ability to make and receive internal and external telephone calls, and enhance current and future mobile/flexible working and collaboration.

At the time both Chichester and Arun District Councils worked together to find a joint solution, and shared the subsequent procurement exercise.

3. PROJECT OBJECTIVES

The project was designed to address the following requirements of installing, configuring and deploying a new telephone system. The objectives and outcomes were as follows:

3.1 Outputs

Output	Achieved	Comments
Installation of New PBX System	Y	
Connection to SIP phone Lines	Y	
Reduction in server space required	Y	
Deployment of full IP Telephony	Y	
Integration with Customer Service Centre Switch	Y	
Ability to make calls from handset and 'soft phones' on IT equipment, for Example calling a contact from the laptop, PC or a conference call with multiple people from a single directory.	Y	
Improved reporting on call handling, volume and use.	Y	
Integration with Microsoft Lync for collaboration and remote working, conference calls and video conferencing.	N	Micollab client provides all the desired functionality as specified. Corporate decision to discontinue with use of MS Lync.

3.2 Outcomes

Outcomes	Achieved	Comments
Deployment of integrated software and hardware to enable Flexible working and unified communications (UC)	Y	
Presence	Y	
Instant Messaging	Y	
File share	Y	
Shared directory access	Y	
Video	Y	
Federation with Lync	N	Micollab client provides all desired functionality specified in PID. Corporate decision to discontinue with use of MS Lync.
Unified Messaging – The ability to use email, software phones, video conference and text from a single system.	Y	
Desktop Sharing and Hot Desking	Y	
Home Remote Working – allow routing of calls to home workers devices	Y	
Conference Calls (voice) – avoid unnecessary traveling with more convenient conferences for discussions and collaboration	Y	
Web Conferencing (video) as above but with video	Y	
Use of 'Soft Phones' – these are software phones that allow the user to call from their laptop or mobile device, would allow home and mobile working	Y	
Installation of a scalable and future proof solution	Y	
Disaster Recovery and Business Continuity – by sharing a system calls could be routed to the partner site at Arun DC	Y	
Partnership Solution and shared working – The proposed solution will allow for a shared system that can be hosted and backed up by both partners. The infrastructure to allow this would also enable a closer degree of shared working	N	No Longer required following conclusion of partnership review. WAN link installed as part of initial DR and BC part of the project is still in place should it be required in the future.
The Customer / Community benefits – improved resilience and improved channel shift by combining the ability to voice call, IM or video call the council.	Y	
Financial – Greater budgetary	Y	

forecasting and control over call costs when routing to mobile workers and partners. Reduced conference costs, telephone line costs and call costs to sites		
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3.3 Outcome Measures

Outcome Measures	Achieved
Replacement telephone system on time and within budget	N / Y *
To have a telephone system capable of supporting a partner site	Y
Ability to re-route calls to alternative destination in the event of system failure	Y
Provision of software phones that run on a user's laptop or PC	Y
Ability to conduct web conference calls and voice calls	Y
Increase in the number of staff working remotely on a regular basis	Y
Increase the number of staff 'hot desking', removing barriers to sharing desks to achieve the ability to work to a 7:10 ratio by December 2016	Y

* c.f. section 5 for timeline slippage explanation

3.4 Dis-benefits

Dis-Benefit	Comments
Potential disruption during install	Previous telephony system was run in situ with the new Mitel telephony system to allow for phased rollout and transfer of extensions across to the new system by service area.
Changes to end user experience and training needs during initial roll-out	Train the trainer approach agreed. Maintel Training professional trained ICT and lead users and lead users trained staff in their service areas with ICT assistance.
Implementation may be extended if joint solution with partner is the approved solution	No longer required following conclusion of partnership review.

4. PROJECT COSTS

Total budget provided £175,000:

Capital Spend		Revenue
Telephone System (including hardware and software)	£115,346.37	£15,372.84
Professional Services	£38,270.65	
Overtime	£5,304.36	
Other	£926.70	
Total	£159,848.08	

5. PROJECT PLAN

The table below demonstrates the project completion dates against the original expected timetable:

Task No.	Task / milestone	Target Date	Actual Date	Comments
Stage 1 – Procurement				
1.1	Place OJEU and issue Invitation to Tender	9 Oct 2015	Oct 2015	<i>Need to incorporate emerging shared services objectives impacted original time line.</i>
1.2	Last date for questions relating to the tender process	13 Nov 2015	Nov 2015	
1.3	Return of Tenders	20 Nov 2015	Dec 2015	
1.4	Initial evaluation completed	4 Dec 2015	Jan 2016	
1.5	Presentations	9 Dec 2015	Jan 2016	
1.6	Evaluation complete	14 Dec 2015	Jan 2016	
1.7	Approval by Council Executive	Jan 2016	Mar 2016	
1.8	Standstill period complete	Jan 2016	Apr 2016	
1.9	Award contract	Feb 2016	Apr 2016	
Stage 2 – Installation Phase 1				
2.1	First Technical project meeting	Feb 2016	Sept 2016	<i>Target dates reflect original PID timeline.</i>
2.2	SIP Connectivity commences	Feb 2016	Oct 2016	
2.3	PBX Installation commences	Apr 2016	Oct 2016	
2.4	POC period commences	May 2016	Oct 2016	
2.5	Sign Off POC	May 2016	Nov 2016	
Stage 3 – Installation Phase 2				
3.1	Installation Phase 2	May 2016	Nov 2016	<i>Dates revised during tender process to those shown in the 'Actual Date' column.</i>
3.2	Training	Jun 2016	Nov 2016	
3.4	Sign Off	Jun 2016	Dec 2016	
3.5	New System – Go – Live	Jun 2016	Jan 2017	
Stage 4				
4.1	Customer Services	Aug 2016	Jan 2017	
Stage 5				
5.1	Partner Integration	Nov 2016	No longer required following conclusion of partnership review	

The original timeline, as set out in the project initiation document (PID), was subsequently revised to accommodate emerging Shared Service objectives. Proceeding against the new timeline, all outcomes were successfully delivered on time.

6. PROJECT MANAGEMENT PROCESS

Originally a 'big bang' approach, where all users were migrated at once, was proposed. However, this was revised to allow for more in depth system testing and a phased user group approach to go-live.

In terms of the overall project, an initial joint project day was held with both CDC and ADC, which launched the configuration and build phase. Corporate decisions were made on the type of devices that would be used and the training / deployment approach.

The install phase, pilot, testing and sign off timescale was condensed and supplier resources were being balanced between Chichester and Arun DC. This did create a pressured scenario where more time to identify issues and fix before rollout would have been beneficial.

Lessons Learned

1. The roll out was rushed and time to test, fix, pilot and train staff squeezed into a short time frame. A more timely and structured approach to roll out and train would be employed in future.
2. A more thorough understanding of working practices regarding call flow and response within service areas would need to be more thoroughly examined prior to go live. Service areas were not familiar with own call handling requirements as originally expected.
3. Full appreciation of potential issues with staff understanding of individual responsibility involving use of the client. Statuses, call flow when unavailable, etc. alongside this, the manager's acceptance and understanding of responsibility for how teams would handle calls and be setup.
4. Headsets\Handset debate. A more comprehensive testing of headset\handset devices would have been desirable with an opportunity to provide a couple more options of choice prior to original deployment.

7. FEEDBACK AND FURTHER ACTION

The project has identified a number of follow on actions as part of our continuous improvement cycle. As part of this process a staff survey was conducted in 2018 with responses from over 50% of users, representing 35 of the councils 37 teams. Feedback covered the positive aspects of the system and reflections on where improvements can be made.

1. The majority of staff are using the Micollab system to make and receive calls both internally and externally.
2. Around 55% of respondents were dissatisfied with the system. The most common problems were poor line quality (crackling etc.) and delays when talking (call lag).
3. 43% of respondents said they would prefer a USB handset if one was available.
4. Although 72% of respondents felt they had received sufficient training before the system was rolled out. 57% were unaware of their Lead User.

ICT lead officer has met with the Divisional Managers and evaluated the results of the following points they were tasked with discussing with their teams:

- How are teams finding the phone system
- Are they set up correctly
- Any training requirements
- Headsets and handsets concerns
- Has this changed the way they work in a positive way

The feedback, though mixed, was not negative being in the main positive and supportive. Changes made in response to the survey have improved user experience. Divisional Managers felt that teams\staff were set up correctly.

The ICT lead officer is also attending team meetings offering a training refresh and to answer questions or concerns and to offer solutions for teams\individuals to achieve desired outcomes.

Divisional managers have advised that most staff were fine with the headsets and there have been minimal requests for the option of a USB handset or duo headset.

All felt that the telephone system and the flexibility it offers with mobile working, working remotely and hot desking, etc. has improved the way we all work in a positive way.

8. REVIEW PLAN

The review process clearly identified areas where improvements can and are making a difference. It also highlighted the importance of users raising issues directly and immediately with IT. Until we are made aware of a problem or issue, we are unable to help.

As a result of the recent engagement sessions, survey and training activities a number of improvement actions are now in hand:

- System Upgrade. Making sure we are operating on the latest software is a priority. Work is currently underway to schedule a complete system upgrade to improve functionality and users experience.
- Offering different headsets, handsets. We will offer the users the choice that suits their needs and environment, having tested new devices with volunteers from the services.
- Offer drop in sessions. Continuing the service engagement activities mentioned above. Drop in sessions, individual training and improved on-line help will build a greater understanding of the systems features and service needs.
- Working in partnership with the lead users to enhance the service as well gain better insight into our users requirements.
- Move away from analogue fax lines. The physical controller in the PBX room can then be virtualised into the VM infrastructure and removed.
- Investigate enhancements to the Azzuri inbound DR portal. Look at the service and product options to improve on the functionality currently available. For example, the ability for callers to receive a voice message in a DR scenario or to even potentially leave a voicemail.