



Business Systems (UK) Limited

G-Cloud 15

**Service Definition Document
Calabrio WFM**



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1 Who are Business Systems?

Business Systems is an independent UK-based transformation partner with over 35 years' experience supporting organisations to modernise customer experience and contact centre operations.

We deliver outcome-driven solutions across AI and Automation, CX Management, Workforce Engagement Management, and Monitoring and Compliance. Our consultative, vendor-neutral approach supports complex, mission-critical environments, enabling secure transitions from legacy systems to modern, cloud-based platforms while maintaining operational integrity, regulatory compliance, and delivering measurable return on investment.

2 What is the Service?

Calabrio workforce management is designed for the modern contact centre and the modern workforce. Through employee empowerment tools, intelligent automation, advanced forecasting and scheduling, Calabrio's WFM solution addresses the acute needs organisations face in today's challenging environment, while helping you navigate the evolving world of work going forward. Calabrio WFM is a highly agile and scalable workforce management platform that allows delivery of seamless experiences for customers, agents, and contact centre managers, no matter where employees are working, remotely, on location or a hybrid mix.

Forecasts: The Forecast module in Calabrio WFM is designed to generate accurate staffing forecasts by leveraging historical data and predictive modelling. It facilitates the creation of long - term forecasts, cleaning of historical data to remove outliers, and application of day - level templates to define intraday distribution patterns. The module supports importing queue data and exporting forecast data

Schedules: The Schedules module delivers efficient resource planning and scheduling. It allows for the creation of agent schedules that adhere to contractual obligations and work rules, utilising both automatic scheduling and optimization processes to align with forecasted needs. Users can manually adjust schedules to accommodate known absences, meetings, and other activities.

Intraday: The Intraday module provides near time visibility into contact centre operations. It compares forecast versus actual metrics such as volume, average handling time, and service levels across four key tabs: Incoming Traffic, Performance, Staffing, and Table View. The module calculates "Required agents" for past intervals & "Reforecasted agents" for upcoming intervals, helping managers proactively address staffing gaps. It also allows for on - the - fly schedule adjustments, including activities, and absences.

Adherence: This offers real -time and historical monitoring of agent activity compliance with schedules, using customizable rules to flag deviations. It includes visual alerts and supports adherence reporting. RTA Snooze temporarily pauses alerts during specific scenarios. Real - Time Desktop Analytics (an addon module) tracks agent activity based on desktop usage, identifying productivity patterns and training needs, especially for back-office tasks like email

3 On Boarding Support

BSL's Cloud Services are delivered in the form of Software as a Service (SaaS) and as a result, can be very quickly deployed. Hosted and managed centrally, standard services can be turned on and off and additional modules added as customer requirements evolve.

For every major on-boarding, BSL assigns a dedicated Prince2 certified Project Manager (PM). It is the PM's responsibility to ensure that all new installations are implemented against and adhere to the agreed project specification.

3.1 Training

Customer training is delivered by BSL Consultants as and where required. The training is consultative and enables the knowledge transfer through hands on exercises and support in building the hierarchy and schedules.

There are also online resources that provide a wealth of material for end users. This includes context driven help, process overview, and troubleshooting guides. End users will also have access to the customer portal which includes forums, FAQs, and product documentation.

3.2 Service Transition Management

As part of the Project Implementation Services, BSL Group will assign a Service Transition Manager, with oversight from the BSL Head of Service Delivery, to manage the Service Transition, from Project to Support. All transition activities will be managed in conjunction with the relevant Client Service Design and Transition teams.

The key objectives of service transition are to:

- Plan and manage service changes efficiently and effectively
- Manage risks relating to new, changed, or retired services
- Successfully deploy service releases into supported environments
- Set correct expectations on the performance and use of new or changed services
- Ensure that service changes create the expected business value
- Provide good-quality knowledge and information about services and service assets

To achieve these objectives, there are many things that need to happen during the service transition lifecycle stage. These include:

- Planning and managing the capacity and resources required to manage service transitions
- Implementing a rigorous framework for evaluating service capabilities and risk profiles before new or changed services are deployed
- Establishing and maintaining the integrity of service assets.
- Providing efficient repeatable mechanisms for build in, testing, and deploying services and releases
- Ensuring that services can be managed, operated, and supported in accordance with constraints specified during the service design stage of the service lifecycle
- Some activities of the service transition processes may be carried out during the service design stage of the service lifecycle – for example, design of a release package or planning of a service transition

The scope of Service Transition includes:

- Managing the complexity associated with changes to services and service management processes
- Allowing for innovation while minimizing the unintended consequences of change
- Introducing new services
- Changes to existing services, e.g. expansion, reduction, change of supplier, acquisition, or disposal of sections of user base or suppliers, change of requirements or skills availability
- Decommissioning and discontinuation of services, applications, or other service components
- Transferring services to and from other service providers

Once Transitioned into live support, BSL will work with the Client to create an agreed escalation process for all aspects of the Service. Several levels of escalation contacts will be provided by BSL.

4 Support

BSL Group will utilise ITIL certified personnel and ITIL methodology to provide a dedicated service and support wrap including all elements listed below for the Clients chosen solution.

4.1 Service Desk

The BSL Group Service Desk is the central point of contact for any support issues related to the production environment, including any security related matters. This team will manage, update, and rectify issues in accordance with the Service Level Agreement.

Our self-service portal is the main way to log and manage any Incidents or Service Requests. The portal allows the Service Desk and client to add updates and attachments throughout the lifecycle of an open ticket.

Where a fix cannot be found at the Service Desk level, the team will manage all escalations to the appropriate resolver groups.

The Cloud platform provides 24-hour surveillance and should BSL be made aware of any security concerns, these will be proactively communicated to the customer.

Based in the UK, our Service Desk operational hours are 08:00 to 17:30 UK time Monday to Friday (excluding Bank holidays). A 24-hour facility is available to customers for incidents logged outside of these operational hours. Incidents logged via the 24-hour facility will be responded to via the on-call engineering team

Our Service Desk provides:

- Service Request Fulfilment
- Incident Management
- Major Incident Management
- Interaction with third parties for end-to-end fault diagnosis
- Problem Management
- First Level Escalation
- Vendor Escalation
- Remote Resolution (where applicable)
- Request Management

The BSL Group engineers will have responsibility for the technical solution and relationships, they all report to the Head of Delivery, and are certified professionals for multiple platforms. There is a full rota of engineers available 24 x 7 for incident management and resolution purposes.

Support is a priority for the engineers who provide:

- Incident Resolution
- Third line support
- Fourth line Vendor liaison for incidents
- Third party liaison for incidents
- Remote Resolution
- Root cause analysis

4.2 Service Level Matrix

Priority Level	Description	Response Time	Resolution Time	Target per Month
1 Critical	System inoperable - No work can be performed, or processing capacity is so limited that the probability of a serious outage and business or revenue impact	20 mins / 30 mins OOH	4 hours	95%
2 High	System Function is inoperable / Data being corrupted – Customer contact centre function is severely limited, and the defect has significant adverse impact on the business.	20 mins / 30 mins OOH	8 hours	95%
3 Moderate	Function Not Working as Specified - This includes issues with the Customer contact centre system which do not stop users from performing daily business or for which there is a reasonable workaround.	1 hour	3 Days	N/A
4 Low	General question or request	8 hours	5 Days	N/A
RCA	A Root Cause Analysis will be provided on the back of every P1 reported	5 Days	N/A	N/A
Proposals	A quote for requests for additional services where the Scope has been clearly identified	5 Days	N/A	N/A

4.3 Priority 1 - 24x7 Support

Priority 1 issues can be raised out of normal business hours (i.e. outside M-F 08:00-17:30, over weekends and UK Bank Holidays) through the contact number which will be provided as part of the Service Transition process.

Resolution of Priority 1 issue denotes a restoration of service not necessarily a permanent fix (e.g., if the service is restored through use of a backup service). If there is a customer request for investigation outside of normal business hours to determine root cause this will be regarded as an Additional Day and charged at the rate specified.

4.4 Major Incident Management

A Major Incident is classified as an event which significantly affects a business or organisation, and which demands a response beyond the routine incident process. The aim in all these cases is to resolve the issue within a short time frame.

Major Incidents can be characterised as the highest-impact, highest-urgency incidents. They typically affect a large number of users, depriving the business of one or more crucial services.

During a Major Incident, the Service Desk will appoint an Incident Manager. Throughout the management process of a Major Incident ticket, the appointed Incident Manager for this ticket should be kept fully informed. It is the responsibility of the Incident Manager to ensure the customer is updated on all steps being performed to try and fix the incident. This enables the assigned Engineer to concentrate on providing a resolution to the reported Incident. The Incident Manager is also responsible for ensuring that internal stakeholders (e.g., the nominated Account Manager for the affected customer) are kept informed.

4.5 Service Delivery Management

A named Service Delivery Manager (SDM) can be provided, who will ensure the operational service is delivered end to end. Delivering all service commitments, ensuring SLAs are measured, reported on, met & improved, and acting as a key escalation point. Additional responsibilities include ensuring all service-based roles are delivered, namely, Transition and Service Introduction, Problem and Change management.

As part of the support provided by the named SDM, monthly or quarterly service reports are provided and presented as part of the service review meetings. The reports give an overview of the service for the previous month or quarter and include details of Incidents, Major Incidents, Service Requests, Problems, SLA Adherence, Change, Release and suggested Continual Service Improvement initiatives. Any outstanding remedial actions, improvements or suggestions can also be tracked through the monthly reports.

In addition, to service reporting, the named SDM will lead the Service Review meetings. Suppliers and other parties can be pulled into these meetings as and when it is felt they are required. In addition to the information set out within the service report, the Service meetings will be used to measure the status of the ongoing relationship between the client and BSL. Some of the methods BSL use to gauge the status of the relationship are regular Net Promoter Score (NPS) surveys and feedback from the completed Customer Satisfaction (CSAT) surveys. CSAT surveys will be issued after the closure of every ticket.

As part of the ongoing service, the service delivery team is also responsible for documenting and managing the progress of any complaint made by the Customer. Any corrective actions that are found to be required as a result of a complaint, can be tracked as part of the service report. BSL will work closely to ensure the complaints process meets the Customer's needs.

Service Level Agreement (SLA) metrics and Service Credits will form part of any final contractual agreement. BSL use response, resolution/fix times, and availability to measure SLAs.

4.6 3rd Party Liaison

BSL will liaise with Customer managed third party vendors (i.e. those contracted directly by the Customer such as line providers) during a system impacting issue. This would only occur following Tier 1 (the Customer) making the initial contact with the third-party vendor and the issue being a combination of our supplied services or an unknown issue where the vendor platform may be a contributor of the root cause. BSL will communicate directly with a third-party vendor where there is a joint investigation agreed (e.g. an unknown issue between the network and Vitality, where both parties need to test in unison to ascertain the root cause) following an initial triage meeting completed as part of the Tier 1 function.

4.7 Vendor Management

Provided by a combination of BSL staff, this includes Commercial negotiation and management for any additional services/licenses required, performance management, relationship management and senior level escalation, liaise with senior sponsors in the vendors, organise vendor innovation sessions, drive requirements and problems into the vendors for innovation.

4.8 Change Management

Change Management is responsible for controlling the lifecycle of all changes to a live environment, either for our customers or internal to BSL. Change Management enables change to happen with minimum disruption to its IT services. The purpose of this section is to detail the BSL Change Management Process for customers.

4.8.1 Definitions

A Change is the addition, modification, or removal of anything that could have an effect on Services. All Installs, Moves, Additions and Changes (IMAC) to the infrastructure, physical or virtual, and any software changes, across the whole service lifecycle should fall under the control of Change Management.

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4.8.2 Objectives

The primary objectives of Change Management are:

- Enable beneficial Changes required by the business to be made with minimum disruption to IT services
- Ensure that standardised processes are used to handle changes efficiently and that the overall business risk is optimised
- Ensure that all proposed changes are evaluated for their benefits and risks, and that all impacts are considered
- Prioritise changes so that the focus is on those changes that produce the greatest benefit and that the resources are allocated based on the real needs
- Ensure that all changes are thoroughly tested where possible, and that each deployment includes a back-out plan to restore the state of the service in case of failure
- Ensure that documentation is updated to reflect the effect of any changes
- Be stable, reliable, and predictable

4.8.3 Change Management Communication

The change implementer will inform the Service Desk before implementing the change. If there is any planned down time scheduled, they will also provide details about the extent of the outage and what users will be impacted.

The Service Desk or allocated Service Delivery Manager will communicate the details of the planned change to the customer via email.

4.9 Problem Management

The definition of a problem is a cause, or potential cause, of one or more incidents. Problems can be raised in response to a single significant incident or multiple similar incidents. The purpose of this section is to detail the Problem Management process for BSL.

Problem management is concerned with:

- The identification and recording of problems impacting service
- Identifying underlying problems to prevent incidents before they occur. Conducting trend analysis of problem management data and incident records helps to achieve this

4.9.1 Goals and Objectives

The goal of problem management is to rectify issues and errors within an infrastructure and to prevent the recurrence of incidents related to these errors. To achieve this goal, problem management seeks to establish the root cause of incidents and then initiate actions to correct the situation.

The objectives of problem management are to:

- Identify and take ownership of problems affecting infrastructure and service
- Take steps to reduce the impact of incidents and problems
- Identify the root cause of problems and initiate activity aimed at establishing workarounds or permanent solutions to these identified problems
- Perform trend analysis to predict future problems

The problem management process has both reactive and proactive aspects. The reactive elements provide direct support to the day-to-day operational activities of other service management functions, such as incident management, and are concerned with initiating activity aimed at resolving problems in response to one or more incidents currently causing issues.

Proactive problem management is concerned with identifying problems and known errors before incidents occur.

4.9.2 Inputs & Outputs

The majority of the incident records are raised either in reaction to users contacting the service desk via phone, email, or the self-service portal. Technical staff who notice potential failures and suppliers that send a notification of a difficulty needing attention also constitute frequent triggers.

Inputs:

- Information about known errors and their workaround
- Communication and feedback about Change Requests and releases that have been implemented or planned for implementation
- Communication of events that were triggered from event management
- Operational or service level objectives
- Customer feedback on success of incident resolution activities

Outputs:

The Problem Management process will generate the below outputs:

- Resolved problems, and actions taken to achieve their resolution
- Updated problem records with accurate details and history
- Raising of problem records for recurring incidents where an underlying cause has not been identified
- Feedback on problems related to changes and releases
- New or updated Knowledge Management Database articles and known errors
- Communication sent to users, including automatic notifications from the ITSM tool
- Satisfaction feedback from customers who are affected

5 Continual Service Improvement (CSI)

5.1 Objective of CSI

BSL service improvement focuses on increasing the efficiency, maximizing the effectiveness, and optimising the IT service management processes. The only way to do this is to ensure that improvement opportunities are identified throughout the entire service lifecycle.

The primary purpose of Continual Service Improvement (CSI) is to continually review and analyse service level achievement. To identify and implement specific activities to improve IT service quality and improve the efficiency and effectiveness of the enabling processes. To improve the cost effectiveness of delivering services without sacrificing customer satisfaction.

5.2 How we manage CSI

Continual Service Improvement is at the heart of the BSL model with a strong focus and belief on driving forward delivering improvements to the customer and user experience. We aim to improve motivation and engagement levels to increase value, individual capability, and knowledge as well as team ability.

Methodologies used to achieve this include:

- Review management information and trends to ensure that services are meeting agreed service levels
- Review management information and trends to ensure that the output of ITSM processes are achieving the desired results
- Conducting maturity assessments against the process activities and roles to highlight areas of improvement or concern
- Reviewing analysed data
- Presenting recommendations to senior management for improvement

- Helping prioritise improvement opportunities
- Leading, managing and delivering cross functional and cross divisional improvement projects
- Building effective relationships with the business
- Influencing all levels of management to ensure that service improvement activities are receiving the necessary support and are resourced sufficiently to implement solutions

5.3 Our Process Model

The improvement process can be summarised in six steps:

- Embracing the BSL ethos by identifying the high-level business objectives
- Assessing the current situation to obtain an accurate, unbiased snapshot of where the organisation is right now. This baseline assessment is an analysis of the current position in terms of the business, organisation, people, process, and technology
- Understanding and agreeing on the priorities for improvement based on a deeper development of the principles defined in the vision
- Detailing the CSI plan to achieve higher quality service provision
- Verify that measurements and metrics are in place to ensure that milestones were achieved, process compliance is high, and business objectives and priorities were met by the level of service
- Finally, the process ensures that the momentum for quality improvement is maintained by assuring that changes become embedded into our organisation

5.4 Service Development

- Innovation - Digital Transformation, Pipeline activities
- Technology – identification and, implementation of tools to enhance service delivery
- Customer Experience - Customer Satisfaction Programme CSAT, enhanced service delivery

6 Ordering and Invoicing Process

All customers are assigned a BSL account manager who will be the first point of contact for commercial queries. Any customer requirements are discussed and documented for sign off by the customer before any cloud services are set up.

- Information and sales enquiries can also be directed to Tel 020 8326 8326
- Purchase Orders should be sent to accounts@businesssystemsuk.com
- Standard payment terms are 30 days

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- All charges are subject to VAT at the prevailing rate

7 Off-Boarding

To facilitate service transition, there are numerous options available for extraction of data at the end of the contract. These would be scoped and agreed with BSL, and a price provided on a time and materials basis.

8 Technical Requirements

BROWSERS

Calabrio ONE is accessed over the internet, using modern versions of Chrome, Edge, or Firefox web browsers and remote desktops. Every user needs a unique email address that becomes their username.

NETWORK BANDWIDTH

Generated audio media data that is uploaded to Calabrio ONE for processing and storage requires network bandwidth availability. To ensure no interruption to uploads, voice communications, or any other customer applications, it is highly recommended that you calculate your estimated bandwidth consumption based on the formulas below and understand how this will impact your network.

- Recording time = (# of users) × (# of calls per user per day) × (avg call length (minutes))
- Upload bandwidth = audio recordings = 0.48 MB × recording time
- Screen upload bandwidth is 1.5 MB a minute per monitor.

MISCELLANEOUS REQUIREMENTS

Supported Environments

Calabrio ONE supports a number environments and technologies.

Compatible versions of Avaya Call Management System (CMS) and Avaya Communication Manager (CM) require the following Avaya WFM connection packages:

- 389240 BCSI CMS WFM Real Time Implementation
- 388807 BCSI CMS WFM Historical Implementation

Desktop Software

.NET Framework

Calabrio ONE Smart Desktop requires .NET Framework 4.5 for the Analytics feature. If it is not installed, Calabrio ONE cannot capture browser events as part of the Desktop Analytics data.

Browsers

Any browser you use must allow file downloads. Popup blockers must be disabled.

Desktop Analytics Plug-in/Extension

Users who administer fields for Desktop Analytics via the Field Manager page in Calabrio ONE and agent desktops that have Smart Desktop installed must have the Calabrio Analytics browser extension/plugin enabled. The plug-in is required not only for marking fields in the browser but also for monitoring agent web activity within the browser.

Enable the Desktop Analytics extension in Firefox

The first time you log in to Calabrio ONE using Firefox, you see a dialog box telling you to install the Calabrio Browser Extension. Select Allow this installation and click Continue.

No further action is required.

Adobe Acrobat Reader

The Adobe Reader is required to open exported PDF files and user documentation. A free Acrobat Reader download is available at www.adobe.com

Desktop Software and Audio Capture

In order for Smart Desktop to perform proper phone detection and audio capture, the ability to detect and capture certain network protocols (such as SIP, SCCP and RTP) is required. Any software running on the PC that interferes with, redirects, or otherwise hides network traffic will cause Smart Desktop to fail to function correctly.

PCI DSS Compliance

NOTE Calabrio ONE v10.3 and higher supports TLS v1.2 and has deprecated TLS v1.1



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systems**

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