INTERNAL MEMORANDUM

SUBJECT: CENTRAL FLORIDA EXPRESSWAY AUTHORITY

          CALL CENTER STAFFING MODEL ASSISTANCE

DATE: MARCH 14, 2017

Background and Objectives:

As outlined in the 2017 Internal Audit plan, the Central Florida Expressway Authority ("CFX") requested that Protiviti, through partnership with its customer call center subject matter expert, assist with an independent analysis of its call center staffing model used to forecast agent staffing needs to match call volume patterns. This request was in part driven by CFX seeking to proactively manage a request from EGIS, its third party, outsourced call center vendor, to hire additional agents to cover increased call volumes and to maintain service levels within established targets. As part of this project, CFX sought to better understand requests from EGIS to hire additional agents, and requested guidance with selecting a technology product to help it proactively manage agent scheduling and forecasting into the future.

Scope, Approach, and Results

During the time period time period of August 2016 through December 2016, a Protiviti supported CFX with the following activities.

1. Pre-procurement advisory services specific to the acquisition of the Monet system, the technology package selected by CFX to manage agent staffing and forecasting within its customer call center.   Specific to pre-procurement advisory services, Protiviti performed the following:

    *   Provided advice and guidance to CFX during the procurement of Monet. More specifically, Protiviti provided input on the functionality and ability of the Monet package to meet CFX's staffing and forecasting management needs.
    *   Read the Monet proposal and provided input to CFX for points to consider.
    *   Provided guidance to CFX on needs and opportunities in advance of the implementation of Monet, including reporting elements and other enhancements. Specifically, Protiviti provided guidance around which components of the Monet platform to acquire to help CFX meet its business needs. Ultimately, CFX elected to add a performance metrics component to the initially proposed scope. The performance metrics component allows for more detailed reporting to help manage the center.
    *   Provided input on skill requirements for potential candidates for an open Business Analyst position to support the new Monet scheduling software.

2. Post-procurement of the Monet software package, Protiviti supported CFX through the implementation of Monet by performing the following:
    *   Provided subject matter guidance and assistance to advise on use and knowledge transfer.
    *   Participated in design meetings with CFX and Monet.
    *   Participated in vendor training and supported CFX throughout the process to verify that the training provided by Monet addressed CFX's needs for effective handover and management of the new solution.

Reporting and Deliverables

No deliverables were prepared or provided as a result of this work and the advisory services provided to CFX. At the completion of the procedures outlined, this memo summarizing the assistance provided has been prepared.