

# Education Services Management Proposal for SUNY Delhi



December 29, 2008

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**TO:** Patrick Masson, Chief Information Officer  
**SUNY Delhi**

**FR:** Darren Sapper, Director of East  
**Presidium Inc.**

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Dear Patrick,

Thank you again for speaking with me in recent weeks and I am delighted to propose a partnership between SUNY Delhi and Presidium.

Please find the following proposal for 24/7 Education Services Management (ESM) for SUNY Delhi. The proposed scope of work includes two high-level options: end-user support for Moodle, and more comprehensive tier-1 contact center services for Moodle, Banner, email, and technical troubleshooting for other common technologies in a multi-sourced environment.

The primary scope of work would include:

- Privately branded ESM environment, including night/weekend or 24/7 interaction support services to be provided via phone, live chat, and email
- Knowledge Management and Change Management Services
- Implementation planning and execution
- Ongoing account and engagement management

Please feel free to contact me at any time with questions or clarification on this proposal.

Best regards,



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## SUNY Delhi: Situation Analysis

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SUNY Delhi has developed an impressive technical support model that involves high-touch professional onsite assistance. With initial success of the recent Moodle deployment and an impending transition away from Lotus Domino, Delhi is contemplating a more scalable support environment with increased attention to the delivery of a best practices framework for delivering 24/7 support for faculty, staff and students.

Under the existing support model, SUNY Delhi faces the challenge of providing high levels of customer satisfaction. The consistency of service, staffing, ongoing training and management, especially during semester transitions, have also proven to be challenges, and SUNY Delhi is thus investigating the feasibility and cost of partnering with Presidium in a phased capacity to address routine IT help desk requests in a multi-channel capacity. Providing a unified front end with a disbursed back end will allow for improved workflow, a reduction in overall support interaction volume and allow full-time staff to address their core responsibilities.

In addition, 24/7 technical support has evolved into a new requirement for both campus-based communities and distance learning initiatives. SUNY Delhi has spent vast resources setting up an anytime/anywhere student learning environment, and we anticipate that Delhi's RFI will show that its end-users increasingly expect that associated support be available anytime/anywhere as well.

## Proposed Statement of Work for SUNY Delhi

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The following Statement of Work (SOW) defines the deliverables to be completed by Presidium, in partnership with SUNY Delhi:

- **Management of the Education Services Environment**
  - **Privately branded ESM environment:** Includes night/weekend/holiday or 24/7/365 interaction support services delivered via phone, Web, email, and live chat
  - **Knowledge Management:** Development of a complete and customized Knowledge Base on Moodle and Banner; FAQs for Lotus Domino (email), phones, cable TV and general technical troubleshooting
  - **On-going Change Management Services:** to ensure proactive communication and management of changes to the support environment
  - **Contact Center Operations:** includes hourly capacity planning, real-time quality assurance, and in-depth reporting and analytics
  
- **Implementation Planning and Account Management**
  - **A customized Implementation Planning Guide and Work Schedule** including a detailed roadmap for customizing the incident management system, documenting telephony infrastructure plan, defining routing and escalation procedures, outlining communication workflows.
  - **Ongoing account management**, including regularly scheduled reviews to examine upcoming changes to the technology and support environment, customer satisfaction surveys, reporting and analytics, and project report card.

## Scope of Presidium Support

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The following represents the proposed scope of ESM solutions for SUNY Delhi as well as the approach for fulfilling the proposed scope of support. Students and faculty will take advantage of centralized support services for their core academic and administrative technologies.

- **Supported Population:** 3,000 students, 500 faculty/staff
- **Application Scope:** Moodle (hosted by Moodlerooms), FAQs for Lotus Domino (email), phones, cable TV and general technical troubleshooting
- **Supported Application Areas:**
  - Option #1: Navigation and troubleshooting for all core teaching and learning functionality and features in Moodle;
  - Option #2: Moodle support as well as Banner, wireless networking assistance, mail client configuration assistance, login/access/password issues, basic cable television troubleshooting including forwarding requests to the cable company on behalf of the student, basic telephone ID and voicemail setup assistance
- **Anticipated Live Support Interactions:** 1,500 - 4,000 annually
- **Projected Handle Time:** <9 minutes
- **First Call Resolution (FCR) rate:** anticipated >70%
- **Average Speed to Answer (ASA):** <3 minutes during peak periods; <2 minutes off-peak

All support interactions outside the supported applications and application areas will be escalated to SUNY Delhi following the escalation procedures defined during implementation. Separate passwords exist for Banner/Moodle, Lotus Domino (email), Resnet (network login), and telephones (faculty/staff only). It is assumed that SUNY Delhi would provide the required VPN access for Presidium agents to reset all such passwords.

Unless otherwise specified, monthly distribution of support interactions will follow a traditional academic calendar and the total assigned volume and resources for call center operations will be allocated as follows:

MONTH	Support VOLUME %
January	12%
February	8%
March	4%
April	3%
May	4%
June	5%
July	5%
August	26%
September	13%
October	12%
November	3%
December	5%

## Presidium's Proposed Approach

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The objective for this proposed model is to find an optimal mix that delivers consistent, highly-available and responsive support in a cost effective framework that suits the specific needs of SUNY Delhi's students, faculty and staff. Presidium's proposed approach includes:

### 1. *Multi-Modal Contact Center*

The foundation of Presidium's support framework is the utilization of a multi-modal contact center to provide 24/7 global support. Delivering support via multiple modalities enables end-users to interact in the fashion that is most comfortable without sacrificing availability or quality.

- *Web Self Service/Knowledge Base*
- *Toll Free Phone*
- *Chat*
- *Web form/Email*

All modes of support are equally critical to the user experience and will be monitored and tracked by the Operations team for quality assurance and customer satisfaction based on web-based surveys.

By utilizing self-help channels, costs are reduced and perceived quality levels are improved. In addition, multi-modal contact centers enable a shared-sourcing environment which provide seamless support for end-users on the front-end, and a distributed support and reporting framework on the back-end.

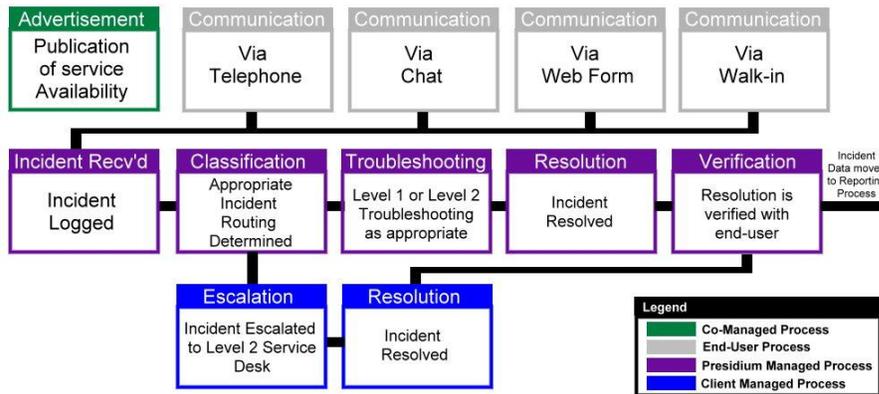
Our proposal for SUNY Delhi includes facilitating and encouraging user self-service through knowledge base resources, tutorials, and documentation. We expect to see the online self-help resources increasingly become an integral component of our partnership. Presidium will develop in partnership with Delhi a comprehensive knowledge base on Moodle, Banner, networking, Microsoft Office, complete with FAQs, troubleshooting tips and articles.

Through its nearly 6-year history, Presidium has developed thousands of FAQs, tipsheets and animated tutorials on all of SUNY Delhi's core academic and administrative technologies. The knowledge base consists of perhaps the largest Moodle self-help document repository in the world, and is endorsed by Moodlerooms. The Moodle knowledge base will be continuously updated prior to the release of new versions and as usage patterns evolve. Presidium would customize the web-based self-help resources for SUNY Delhi for technical accuracy and relevancy.

### 2. *A Co-Managed Engagement*

To accomplish SUNY Delhi's goals, Presidium proposes a co-managed environment for managing student, faculty and staff interactions. In a co-managed environment, Presidium would assume front-line responsibilities for responding to all inbound support interactions for the applications listed in the Scope section, and creating service records for all inbound support interactions. Standard Level-1 issues for Moodle include: navigation, functionality questions (e.g. assignments, grades, blogs), password management, logins, internet connectivity, and browser issues. Examples of Level-1 issues for Lotus Domino (email) include mail client configuration, browser navigation and rules, and examples of Level-1 MS Office issues include file version compatibility questions and ribbon navigation. Common wireless network connectivity issues are also considered Level-1. These Level-1 issues and others within the agreed upon scope would be resolved by Presidium with a first call resolution rate of at least 70%. All other issues would be dispatched, or routed, to the appropriate service queues at SUNY Delhi.

The following workflow illustrates how interactions are managed in the Presidium environment. This support framework centralizes technical support interactions and will direct users to Presidium's/Delhi's self-help knowledge base that encourages end users to resolve issues online, but also provides the option for live support via toll free phone, chat, and web submission.



As one of the many benefits of co-sourcing, Presidium and SUNY Delhi will collaborate to develop escalation workflows that complement Delhi's many strengths and leverage the human and infrastructure resources that Presidium can bring to this engagement. The Implementation Planning process will provide critical information for mapping workflows and documenting support procedures.

### **Presidium Responsibilities**

1. Comprehensive implementation planning and ongoing management of all facets of this proposed engagement.
2. Deploy multi-modal contact center infrastructure and provide privately branded support environment; Client specific training and resource allocation.
3. Telephony architecture and configuration.
4. Provide comprehensive utilization reports including telephony, case volume, customer survey results; Customization to support processes and procedures as necessary.
5. Named account/project manager to serve as SUNY Delhi's primary point of contact.

### **SUNY Delhi's Responsibilities**

The responsibilities listed in this section are general guidelines based on proven best practices for successfully implementing a contact center environment:

1. Identify a Project Coordinator who has the authority to act on behalf of Delhi in all aspects of this proposed partnership. This Project Coordinator will be the focal point for Presidium communications.
2. Conduct a thorough review of the proposed scope of support to ensure that SUNY Delhi and Presidium have established a clear understanding of the support environment and expectations of support.
3. Provide Presidium with timely and complete responses to all documentation and planning conference calls and meeting; provide training as appropriate or required in order to successfully support authorized end-users.
4. Share best-practices with Presidium and members of the Presidium support community.

**Option #1: SUNY Delhi pricing for Moodle support:** includes identity management (password) issues

		<b>Nights/Weekends</b> <b>(M-F: 5pm to 9am</b> <b>Sa/Su: all day)</b>	<b>24/7/365</b>
<b>Project/Account Management</b>	<p>Includes implementation planning sessions, development of knowledge base architecture, content, reporting workflow, telephony, training on incident management system and all startup consulting and implementation labor.</p> <p>The Account Manager also manages all facets of the project and is the primary contact for SUNY Delhi. Includes ongoing knowledge management responsibilities, telephony customizations, monthly reporting, planning for Moodle additions/upgrades, Presidium agent training and bi-monthly conference calls.</p>	<p><b>\$8,500</b></p>	<p><b>\$8,500</b></p>
<b>Contact Center Infrastructure</b>	<p>Presidium will deploy a fully hosted web-based comprehensive online support system, including:</p> <p><b>Front-end support portal:</b> privately branded for SUNY Delhi with hundreds of self-help FAQs and troubleshooting tips for Moodle, and other desired technologies such as Office 2007.</p> <p><b>Chat:</b> for live student/faculty support interactions.</p> <p><b>Surveys:</b> allows end users to respond to custom surveys for measuring customer satisfaction.</p> <p><b>Reporting:</b> comprehensive web-based monthly reports on incident breakdown and knowledge base activity</p> <p>SUNY Delhi staff will not have administrative access to the backend ticketing system and support portal. Incidents will be escalated to Delhi staff via email.</p>	<p><b>\$8,500</b></p>	<p><b>\$8,500</b></p>
<b>Contact Center Operations</b>	<p>Includes seasonal adjustments for peak and steady-state periods.</p> <p>Support interactions @ \$11 each</p> <p>Live support interactions via phone, chat, web, email submission</p> <p>Nights/weekends: 1,500 annual support interactions (Presidium's minimum)</p> <p>24/7/365: 1,800 annual support interactions</p>	<p><b>\$16,500</b></p>	<p><b>\$19,800</b></p>
<p><b>Total</b></p>		<p><b>\$33,500</b></p>	<p><b>\$36,800</b></p>

**Option #2: SUNY Delhi pricing for comprehensive tier-1 enterprise help desk services:** includes Moodle, Banner, identity management (password) issues, and basic support for Lotus Domino (email), cable TV, faculty/staff telephones, and general technical troubleshooting in areas such as browsers, media players, and wireless network connectivity.

		<b>Nights/Weekends (M-F: 5pm to 9am Sa/Su: all day)</b>	<b>24/7/365</b>
<b>Project/Account Management</b>	<p>Includes implementation planning sessions, development of knowledge base architecture, content, reporting workflow, telephony, training on incident management system and all startup consulting and implementation labor.</p> <p>The Account Manager also manages all facets of the project and is the primary contact for SUNY Delhi. Includes ongoing knowledge management responsibilities, telephony customizations, monthly reporting, planning for Moodle additions/upgrades, Presidium agent training and bi-monthly conference calls.</p>	<p style="text-align: right;"><b>\$11,500</b></p>	<p style="text-align: right;"><b>\$11,500</b></p>
<b>Contact Center Infrastructure</b>	<p>Presidium will deploy a comprehensive online support system, including:</p> <p><b>Front-end support portal:</b> privately branded for Delhi with hundreds of self-help FAQs and troubleshooting tips for Banner, Moodle, Office 2007 and custom technologies and procedures.</p> <p><b>Ticketing system:</b> for call tracking, reporting and workflow; includes custom workflow and reporting fields, alerts and notifications, ability to route, prioritize, and manage the co-managed contact center environment.</p> <p><b>Chat:</b> for live student/faculty support interactions.</p> <p><b>Surveys:</b> allows end users to respond to custom surveys for measuring customer satisfaction.</p> <p><b>Reporting:</b> comprehensive web-based real-time reports in incident breakdown and knowledge base activity</p> <p>Pricing for 3 named users (seats) for staff back-end access:</p> <ul style="list-style-type: none"> <li>• Annual license/hosting: \$7,500</li> <li>• 3 seat licenses: \$1,800 each</li> </ul>	<p style="text-align: right;"><b>\$12,900</b></p>	<p style="text-align: right;"><b>\$12,900</b></p>
<b>Contact Center Operations</b>	<p>Includes seasonal adjustments for peak and steady-state periods.</p> <p>Support interactions @ \$13 each</p> <p>Live support interactions via phone, chat, web, email submission</p> <p>Nights/weekends: 2,000 annual support interactions</p> <p>24/7/365: 4,000 annual support interactions</p>	<p style="text-align: right;"><b>\$26,000</b></p>	<p style="text-align: right;"><b>\$52,000</b></p>
<p style="text-align: center;"><b>Total</b></p>		<p style="text-align: right;"><b>\$50,400</b></p>	<p style="text-align: right;"><b>\$76,400</b></p>

## Pricing Notes and Assumptions

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- Presidium ESM solutions are structured as annual terms; the agreement automatically renews for successive one-year terms unless either party provides notice of its desire not to renew at least thirty (30) days prior to the end of the term.
- Service levels associated with the anticipated volume and projected distribution of volume include average hold time of less than 3 minutes during peak periods and 2 minutes off peak.
- Average handle time, including talk, research, and wrap-up will reflect the average handle times reflected in the Scope of Presidium Support.
- During the initial annual term, if total support interaction volume is exceeded, an additional 10% support requests will be supported at no additional cost. Any incidents above 110% of the annual request volume will be billed at the rate of \$12 (Option #1) or \$14 (Option #2) per incident unless an additional block of incidents are purchased prior to exceeding target support volume.
- In the event that actual annual support volume exceeds assigned volume by more than 10%, the renewal contract will be adjusted upward to reflect actual support volume.
- Three seats in the shared hosted ticketing environment are assumed in this proposal for Option #2. Additional seats may be procured at an annual price of \$1,800 each.
- Pricing is valid for 90 days from the date of this proposal.