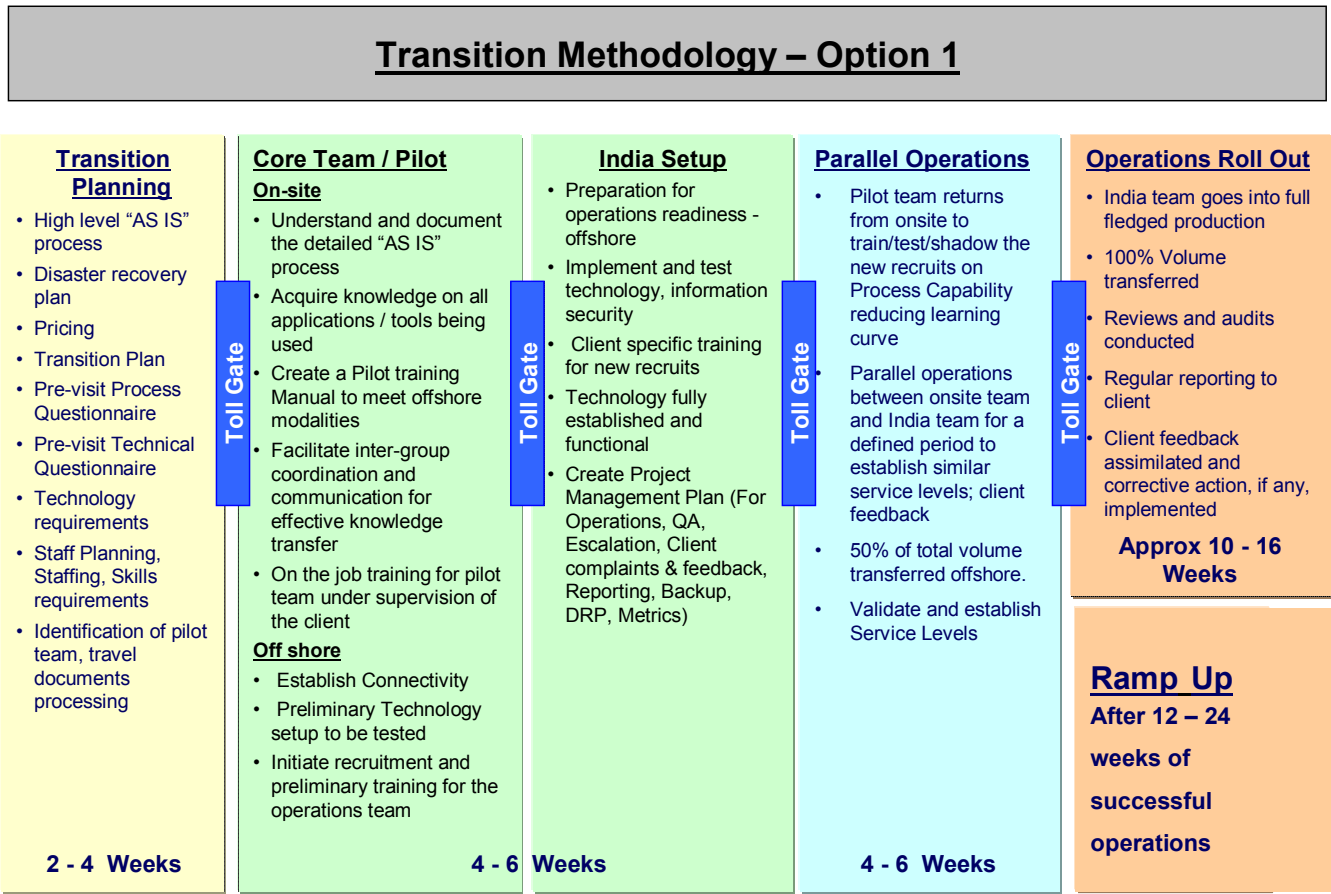


**Transition Processes:**

There are 2 generic processes that are proposed to clients for transitioning of various projects. These are explained in detail below:



Activities in Core Team / Pilot Stage & India Setup are coterminous



During this phase, a high level understanding of the activities and the processes is achieved. A disaster recovery plan is formulated to minimize the impact of any unforeseen/ sudden circumstances that might have any negative impact. Pricing is also decided based on the needs of the customer, market rates and various other factors. A formal transition plan is then formally put into place detailing the various technology requirements (Software, hardware, application/tools). Staffing / skills requirements are also identified based on the complexity of the activity / process. The technology department then maps out detailed connectivity plans and bandwidth requirements and takes necessary steps to fill gaps, if any. The Pilot team for training will be identified. Disaster recovery plans are firmed up with specific reference to the project.

### **Pilot Phase**

The Pilot team understands and documents activities/processes in detail, acquires requisite knowledge on all applications/tools used onsite. The pilot team then prepares a detailed training document, suitably adapted for offshore use. This document is used for training all off shore resources. The pilot team facilitates communication between Client and the offshore team to enable comprehensive and effective knowledge transfer.

Note: In case any specific knowledge/proficiency in specific tools being used by Client is required, then a visit to Client's site would be necessary. Here, the pilot team is trained "on the job" by Client'. In this case, the activities in this phase would be carried out simultaneously at Client's premises and at Genisys' site in India.

A ten-member team will normally conduct the pilot phase:

The team will include:

- 1 Project Manager (On site coordinator, if necessary)
- 1 Team coordinator/Trainer
- 2 Team Leader
- 6 executives

All the members of the Pilot team will have the following skills:

- Experience in handling the activity being outsourced to Genisys
- Listening skills, Accent neutralization training, as required
- Knowledge specific to the activity being outsourced
- Appropriate skills to be able to handle the activity

Simultaneously, connectivity is established from Genisys to the Client, and preliminary testing is conducted. Recruitment of the offshore team commences after validation of skill sets defined earlier, and preliminary training (induction, accent

neutralization, cultural orientation, customer service skills, typing tutoring, as may be required etc.) is imparted to the new recruits.

### **India setup**

All requirements for operations from offshore are put in place and tested. This includes implementation of technology and information security. Test runs and evaluations are conducted and arrived at to ensure maximum utilization of technological resources for the pilot team to carry out operations. Project specific training, as per the training document prepared by the Pilot team, is conducted for off shore resources. This training includes product knowledge, workflow dynamics, application familiarization and execution in a simulated environment. The resources are closely monitored and coached proactively to ensure that they are fully equipped to deliver along expected service levels.

A detailed Project Management Plan, comprising processes for Operations, Workflows, Quality Assurance Customer Complaints and Feedback, Reporting, Backup Disaster Recovery Plans and Collection and Analysis of Metrics is prepared. All Project and operational documents are reviewed and approved before implementation.

### **Parallel operations**

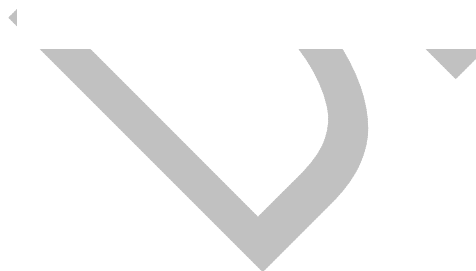
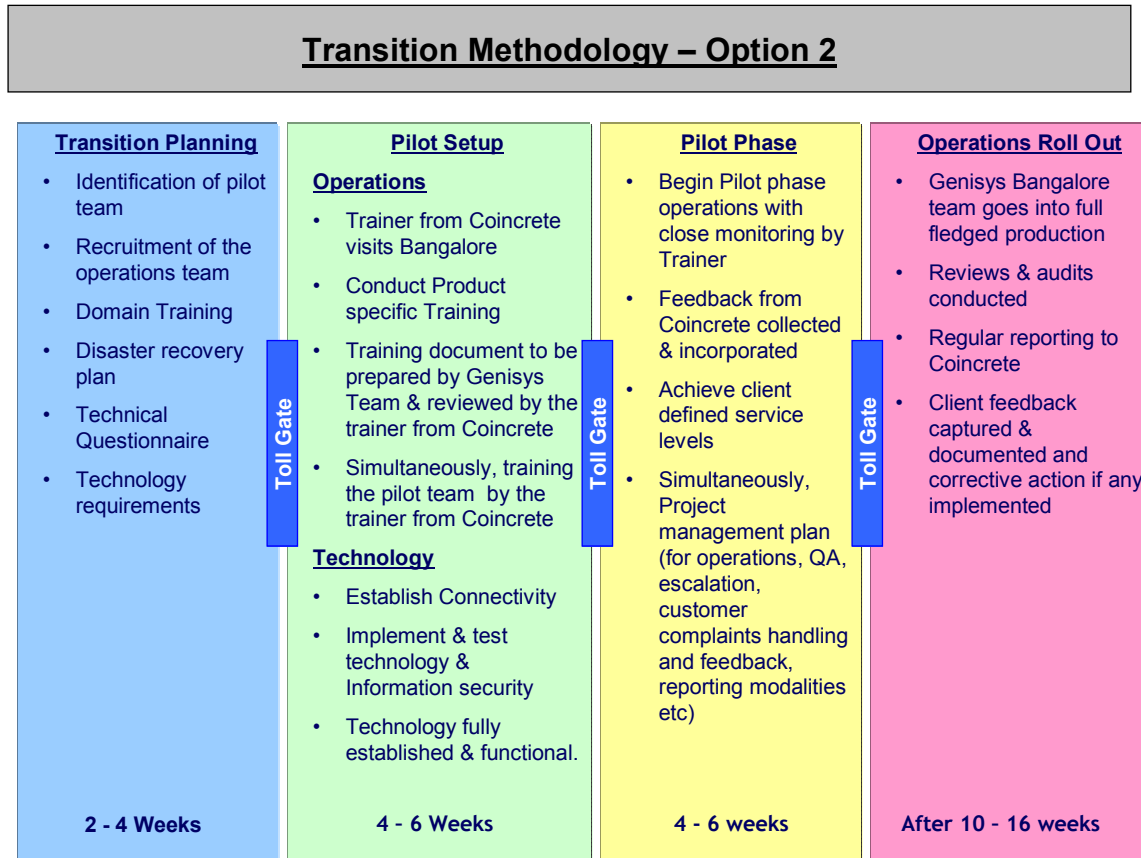
These members will then conduct a complete and comprehensive review of the offshore team members, in terms of preparedness for delivery, simulating a “real life” environment. This is done specifically to share best practices and thereby reduce the learning curve for new recruits.

Part of the calls will then be routed to India, and will be handled by the Pilot team members who have traveled back to India. The offshore team members will shadow the Pilot team members closely, and will be introduced to the live work environment in a phased manner. The team will be monitored closely and proactively coached to ensure delivery as per the defined service levels. The connectivity and system performance will be monitored and fine-tuned to ensure maximum utilization. 50% of the volumes handled by the pilot team will be transferred to the off shore teams.

### **Operations Roll Out**

Once the parallel operations phase is complete, the remaining members of the Pilot team will return to India and join the offshore team in performing all the process related activities. The performance of the team will be monitored closely, measured and evaluated with proactive corrective action being initiated. The project manager will report to program manager with performance reports and timely feedback taken. Client feedback is also obtained and the resulting feedback is

then implemented. Regular, scheduled performance reviews are then conducted to ensure process visibility and control. Suitable ramp-up plans / next steps will be ascertained and implemented.



## **Transition Planning**

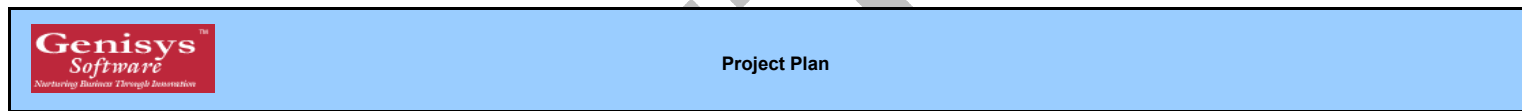
During this phase, a high level understanding of the activities and the processes is achieved. Technology requirements (Software, hardware, application/tools) are identified. Staffing / skills requirements are identified based on the complexity of the activity / process. Recruitment of agents is completed. Domain training, accent neutralization and enhancement are completed and the team is ready to be trained on customer specific products. Disaster recovery plans are formulated with specific reference to the project. With the help of the technical questionnaire details provided by the client, our technology department maps out detailed connectivity plans and bandwidth requirements. This ensures that the necessary infrastructure is in place for the pilot phase to be conducted in a smooth manner.

## **Pilot Setup**

Under this option the training is done offshore i.e., at Genisys, India. The trainers from the Client site will visit offshore site and impart product specific training to the Pilot team representatives. This Pilot team understands and documents activities/processes in detail, acquires requisite knowledge on all applications/tools used. The pilot team, with the help of the trainers from Client, then prepares a detailed training document, suitably adapted for offshore use. This, in turn, is reviewed and approved by the trainer for final documentation and immediate implementation. On the technology front, connectivity is established from Genisys to the Client, and preliminary testing is conducted. After testing and implementation of the technology and information security as desired, the technology front is also considered fully functional and ready for operations.

## Pilot Phase

The offshore team now begins operations on a pilot phase with close monitoring effected by the client side trainer. After review and supervision, the trainer then provides feedback on the process and individual performances and corrective action is taken, wherever necessary. The team will be monitored closely and proactively coached to ensure delivery as per the defined service levels. The connectivity and system performance will be monitored and fine-tuned to ensure maximum utilization. Simultaneously, a project management plan is rolled out to ensure that all areas related to the project are ascertained and documented in detail. An example of the project management plan as visualized by us is found below:



Go Live : Team Strength: Pilot phase :	Ramp Up Go Live : Team Strength			Operations: HR: Quality: Tech Support: CRM Application:	Timings for calling:	
Task	Duration	Start date	Scheduled Completion Date	Finish date	Comments / Notes	Owner
<b>Contract Negotiation</b>						
Contract Signed						
<b>Exchange Contact Information</b>						
<b>Pre project plan</b>						
Determine all Business objectives and program metrics						
Complete program checklist and communicate to all key stake holders						
<b>Project Management</b>						
Select Project Implementation Team						
Determine Schedule of meetings with Client Project Team						
Have the first implementation team meeting						
Determine the schedule of calls with the Client						
<b>Human Resource</b>						
Select Program Manager						
Select CSRs						
Select Team Supervisors						
Select QA personnel						
<b>Training</b>						
Generic Training for pilot batch						
Obtain Training Material from Client						
Develop Client - related training documentation						
Client Specific Training-Train the Trainer/Train Pilot batch						

<b>Technology</b>						
<b>Software</b>						
Requirements of docs from Client						
Design of the front end application						
Scripting						
Reporting Requirements						
Database design						
Coding for Front end application						
Test campaign						
Check Reporting as per Client's format						
Feedback from MIS on reports						
Test all reports for integrity						
Client approval of reports						
Update records during shift changeover (Scrubbing the records)						
Create campaign on the dialer						
Create workgroups on VocalCom server / switch for IB and customer service						
Test the application						
Documentation of the application (User Manual)						
<b>Hardware</b>						
Hire / Purchase computers						
Install computers with apps						
Procure Headsets						
Procure Phones						
Install Phones & Headsets						
Security Requirements						
<b>Testing</b>						
Create testing plan						
Carry out System Integration Test						
Carry out End-to-end testing						
<b>Operations</b>						
Obtain Client call monitoring requirements						
Document call monitoring procedures						
Obtain Quality policy for failed monitors						
Obtain list of Key Performance Indicators						
Obtain list of call dispositions						
Obtain loose script from Client						
Develop Program Manual						
Develop Business Continuity Plan						
Documentation of Call flow completed						
Create BCP Escalation Plan						
<b>Reporting</b>						
Obtain Report delivery schedule from Client						
Obtain Billing Format						
Obtain supporting documents required for billing						
Develop Bill generation process						
<b>Facilities</b>						
Allocate workstations and space						
Arrange transport in accordance with Schedule						
<b>Scheduling</b>						

Obtain call volume forecast from Client						
Schedule Workforce according to forecast						
<b>Go Live</b>						
Go Live with X seats						
<b>Deliverables from Client</b>						
All deliverables received from Client						
Program startup checklist Updates						
<b>Quality</b>						
QA processes and procedures developed and tested						
<b>Other Special Business requirements</b>						
<i>Scheduler</i>						
<b>Customer sign off on all start up plans</b>						

**Operations Roll Out**

Once the pilot phase is completed, the offshore team will move into full fledged production/ process related activities. The performance of the team will be monitored closely, measured and evaluated with proactive corrective action being initiated. Regular, scheduled performance reviews and audits are then conducted to ensure that service levels are met, process visibility and control. The project manager will report to program manager with performance reports and timely feedback taken. This is turn is shared with the clients in the form of project reports that are maintained on a daily/ weekly/ monthly basis. Client feedback is also obtained on a regular basis, captured and documented with the resulting feedback then being implemented.

