

CARBON –PROOF OF CONCEPT

PROJECT OR PRODUCT NAME:

Carbon
Account Replication Tool for CCB & MDM

PURPOSE:

The Purpose of this POC is to demonstrate the feasibility and viability of Carbon, a web-based tool used to replicate CCB and MDM accounts or convert from one to the other.

THE PROBLEM:

Rolling out new major functionality for CCB or MDM requires significant development, testing, and training. Preparing accounts for training staff of customer service representatives (CSRs) can also be very time-consuming. Getting current accounts that meet specific requirements into the correct environments for development and testing can be challenging.

THE GOAL/PROBLEM ADDRESSED:

Carbon rapidly duplicates CCB and MDM accounts for training and testing via a web-based interface.

Training: Carbon allows trainers to create many copies of a single account from any environment that meets their scenario requirements.

Carbon makes training:

- Easier to prepare: The time required to prepare the accounts for training can be reduced by order of magnitude.
- Consistent: All trainees have the same experience. The trainer no longer has to deal with issues related to each trainee having a different account.
- Robust: Each CSR can practice the scenario several times. If necessary, more replicas of accounts can be made quickly and on the fly.
- Simplified: All training is done in one environment.

Testing: With Carbon, accounts can be replicated from production and between development and testing environments.

Carbon assists with:

- Problematic accounts: Issues can easily be located and fixed by replicating the account in the development environment.
- Testing accounts: Replica accounts can be tested first to confirm the veracity of the fix before testing on the original account. The original account remains pristine until the correct fix is found.
- Automation testing: Never run out of accounts.

TARGET AUDIENCE:

Carbon is designed for trainers, testers, and IT management. Duplication of accounts becomes a simple task that takes minimal time, rather than a tedious project that can push a Go Live by two months. The

users of Carbon will save countless hours of preparation and can focus on their projects sooner while ensuring their team members are trained effectively.

By creating a CCB with just configuration data, users of Carbon can replicate just the accounts they need for their business cases. This allows for smaller servers as the amount of data is significantly reduced.

Carbon improves the learning process because all team members use the same account, which means trainers can check to ensure all learners have the same results. If someone's account looks different, they can troubleshoot to figure out what steps they missed.

RESOURCES NEEDED:

Implementing Carbon will require meetings between Carbon's support team and the enterprise's CCB and MDM teams. The support team provides documentation detailing the required steps to configure Trellis so that the enterprise's CCB and MDM teams can set up the application and manage the relevant databases for their organization. The product's support team aims to train the enterprise's CCB and MDM teams to a level of self-sufficiency so that they may train their enterprise's critical personnel as required for their use case.

The enterprise's leadership team, IT, QA, business personnel, and other critical roles may be required to attend training meetings to learn how to use Carbon effectively for their specific use case.

The total cost to implement an abridged version of Carbon for the purpose of this POC is \$15,000.

SUCCESS CRITERIA/KPIs:

Success criteria will be measured by the following:

- Time required to prepare the accounts for training.
- Team member efficiency and comprehension following training.
- Duration spent resolving bugs in replica accounts.

PROJECT SCOPE:

The enterprise's IT personnel will review the provided documentation and configure Carbon in a test environment. Once the test environment is configured to satisfaction and the enterprise's leadership has approved of the system's functions concerning business operation, the system will be implemented into a production environment and available for all future account replications.

TIMELINE:

Phase 1: Meet with IntelliTect's Carbon support team and purchase a license.

Phase 2: Review documentation and configure the system. Meet with the IntelliTect Carbon support team as needed to answer any questions.

Phase 3: Train crucial personnel using a trial project in a test environment and address any questions.

Phase 4: Rollout to the organization in a production environment.

CONCLUSION:

This POC has demonstrated the feasibility and viability of Carbon, and we believe that it has the

potential to be a successful and valuable addition to an enterprise's CCB and MDM account replication tools.