



**Customer Change  
Management Process**

January 2018

# Customer Change Process

## IDENTIFY

- Does the work required meet the criteria for CM work? (Pg7)
- Yes? Is the end user authorised to request a change of this nature?
- Check the Authorisation Form submitted and confirm.
- No Authorisation Form? Request one is completed by their Head of Ops / It Manager.



**Authorisation Form**

## NOTIFY

- Is the work requested a chargeable MAC?
- Notify the customer of the applicable charges and await written acceptance.
- Once accepted, assign the work to an engineer and notify them of its chargeable status.



**MAC Notification**

## APPLY

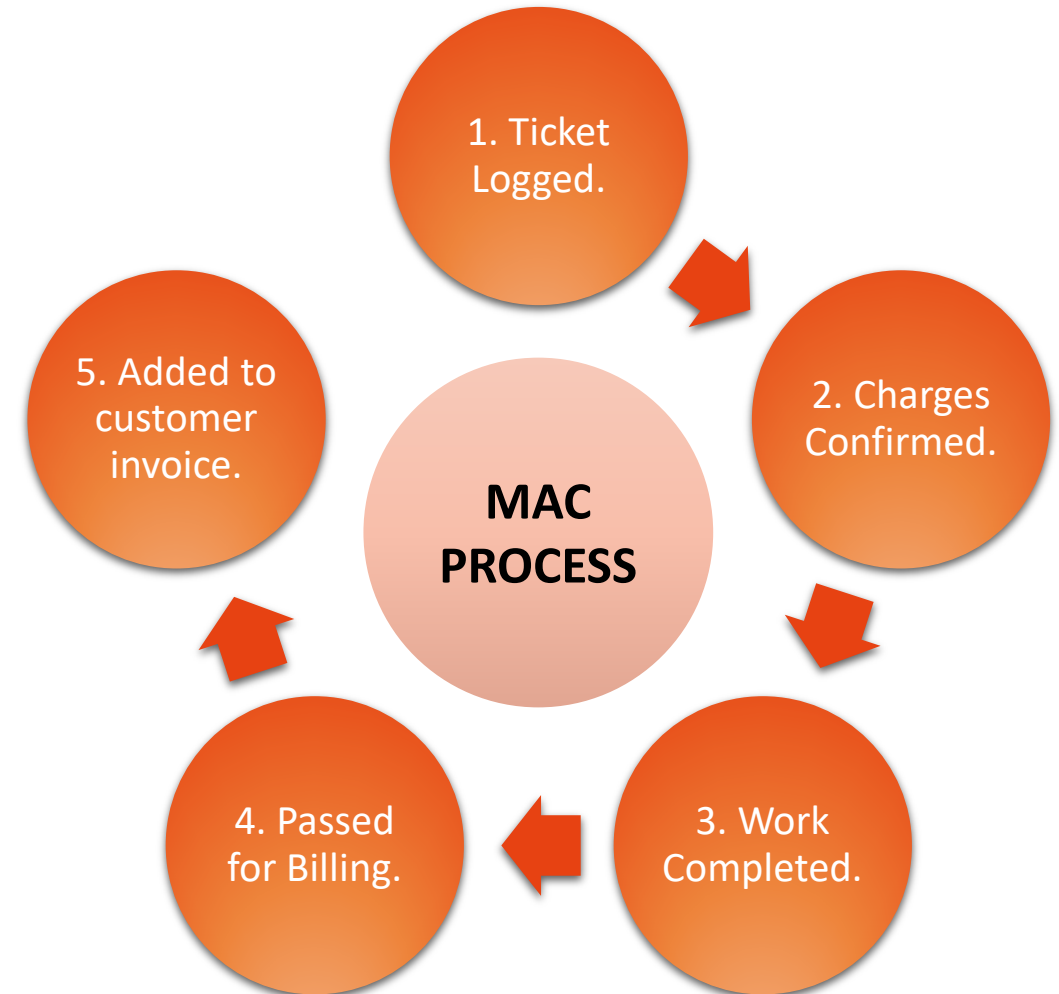
- Work can now commence. All updates must be added to the applicable ticket.
- If applicable, a notification is sent to the customer and to [changenotifications@solar.co.uk](mailto:changenotifications@solar.co.uk) using the Start / Stop template upon commencement and completion of the work.
- An engineer sign off is required in the ticket also.



**Engineer Sign Off**

# Change Management – MAC Process (Chargeable)

1. Ticket is logged by the customer requesting programming work. Ticket item is changed to 'Programming – Chargeable'.
2. Programming work is confirmed as chargeable and written confirmation of the applicable charges are confirmed with the customer.
3. The requested programming is completed by an engineer and tested with the customer.
4. Confirmation of time taken to implement the request is added to the ticket via the chargeable update template and passed to the 'New Orders' board.
5. Finance / Billing add charges to the customer invoice.



# Change Management Checklist – Customer MACs

Moves, Adds and Changes (MACs) are programming changes to a system that are ad-hoc and not related to a fault. MACs are chargeable unless part of a customer's agreement. **\*\*PLEASE NOTE\*\* Only Paul Ceaser or Will Kennedy can authorise a MAC to be carried out free of charge or at a reduced rate.**

Work Description	Authorisation Required?	RFC Form Required?	Chargeable?
Extension Name Change (1-5)	✗	✗	✓
New User Setup (1)	✗	✓	✓
New User Setup (2+)	✗	✓	✓
Music on Hold	✓	✓	✓
Handset Diverts (1)	✗	✗	✓
Handset Diverts (2+)	✗	✓	✓
Voicemail Pin Reset	✗	✗	✗
IVR Changes	✓	✓	✓
Hunt Groups – Creation	✓	✓	✓
Hunt Groups – Add Users (1-5)	✗	✓	✓

# Change Management Checklist - Customer



\* Not chargeable if part of an ongoing fault.

Work Description	Authorisation Required?	RFC Form Required?	Chargeable?
Ring Group / Call Flow Changes	✗	✓	✓
Main Number / Group Diverts*	✓	✓	✓
International Call Barring	✓	✓	✗
Time Schedules	✓	✓	✓
Deleting Users (1)	✓	✗	✓
Access to DB Programming	✓	✗	✓
VPN Additions	✓	✓	✓
Add / Removing VPN Users	✓	✓	✓
JFLOW Additions	✓	✓	✓
QoS Settings	✓	✓	✓
Archive Location Change	✓	✓	✓
Deletion of Recordings	✓	✓	✓



# Change Management Checklist - Customer



Work Description	Authorisation Required?	RFC Form Required?	Chargeable?
Handset Setup (Replacement)	✗	✗	✓
System Upgrades (Non-Fault)	✓	✗	✓
Quick Dial Key (1 User)	✗	✗	✓
Quick Dial Key (All Phones)	✓	✓	✓
Silent Monitoring Setup	✓	✓	✓
Number Block (without app)	✓	✗	✓
Day / Night Service Setup	✓	✓	✓
DECT Handset Setup	✗	✗	✓
Voicemail Setup	✗	✗	✓
Report Setup	✗	✓	✓
MAC Written Instructions	✗	✗	✓
Router Configuration	✓	✓	✓



# MAC Programming Charges



There are two types of charges that we pass onto customers; remote engineering and onsite visits. These charges are outlined below.

## Remote Programming Charges

Cost	In Hours (0900-1730) Monday to Friday	Out Of Hours (1731-0859) Monday to Friday	Weekend/Bank Holiday All Hours
Per Hour	£80	£110	N/A
½ Day (4hr)	£300	£420	£550
Full Day (8hr)	£600	£720	£960

## Onsite Programming Charges

Cost	In Hours (0900-1730) Monday to Friday	Out Of Hours (1731-0859) Monday to Friday	Weekend/Bank Holiday All Hours
½ Day (4hr)	£450	£675	£900
Full Day (8hr)	£800	£1,200	£1,600

# Authorisation Form



## WHAT?

- An Authorisation form is a document that details who within a company is authorised to request service or financially impacting changes. **Only 3 people can be authorised at any one time.**

## WHY?

- Limiting the number of personnel who can request changes to the system is a very important segment of ISO accreditation protocols. It introduces a new level of security for the customer, ensuring no malicious changes are made to their system resulting in loss of service, business or monies.

## WHO?

- All personnel within Solar Communications have access to the Authorisation forms for information purposes.
- Only the end customer can complete the form; it must be filled in by a Head of Ops / CTO / IT Manager.
- Only one person within the end customer business can be the owner of the Authorisation List.



**Authorisation Form**



# Request for Change Form (RFC)

## WHAT?

- A Request for Change (RFC) is a formal proposal for a change to be made. It includes details of the proposed change, and may be recorded on paper or electronically.

## WHY?

- The document provides clarity to all parties involved in the implementation of the Change Request and also provides an audit trail for ISO assessment. Each RFC form is saved and documented against each ticket within Connectwise.

## WHO?

- The end customer completes the Request for Change form to detail the actions they would like our engineers to take on their platform, the results they expect and what they would like us to do should the work not have the desired effect. This can only be submitted by one of the three authorised personnel within the company.



**RFC Form**