

# HHT-Service Plan



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## Technical Support Scope and Strategy for Keller Williams® Realty Southeast Region 19 Market Centers

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# I. Scope of Support (Initiatives)

The HHT-ServicePlan is written to explain how the technical support for a Market Center pod and KWR Agents is to be delivered. The roles and responsibilities of the service plan will disseminate to the pod's assigned Technology Manager. Each manager has been charged with the duty of ensuring the constant management of 5 Technology Initiatives. Collectively, these initiatives define the *Scope of Support*.

## **1. Hardware and Software Support for KWR Offices and Agents**

1. Traditional Hardware Break/Fix
2. Desktops, Laptops, Peripherals (Printers, Scanners, misc)
3. Traditional Software Support
4. How-To-Questions
5. Desktop (Microsoft Suite, Adobe)
6. Common KWR Software (Webmore, Netmore, MYOB, WSFTP, SWIFT, Print Audit)
7. Common Web-based Software (FMLS, GAMLS, KW.COM [Webmore], P2Agent, Top Producer Online, eNeighborhoods)
8. Error Interpretation / Resolution
9. Upgrades and Updates

## **2. Network and Domain Administration for the KWR Market Center**

1. Peer-to-Peer / NT / W2K / Active Directory Support
2. Account Administration
3. Security / Firewall / Group Policy Administration
4. Data Storage, Backup, and Disaster Recovery Plan
5. Wired and Wireless Support
6. Network Problem Analysis
7. Management of Growth, Upkeep, and Load Balance
8. Management of Network Services (Printers and Scanners)

## **3. Training**

1. New Agent Orientation (Technical)
2. Productivity Software (Microsoft Office, Contact Database Management, Marketing)
3. PC Usage
4. KWR Tools (Webmore, Web-templates, KWU)
5. Web Development
6. New Product Demonstration and Orientation
7. Topics requested by KWR Administration and Agents

## **4. Vendor Management**

1. Major Systems Installation, Upgrades
2. Special Assignments
3. Preexisting Contract Obligations
4. Out of Scope Technologies

## **5. Planning, Project Management & Growth**

1. Network and Systems Expansion to meet increasing Agent and Administration Staff headcount
2. Management of Equipment Lifecycle – Preventative Maintenance and Replacement
3. Software Licensing – Renewal, Upgrades, and Updates
4. Procurement Consultation
5. Project Management for Assignments from KWR Administration Management Staff
6. Product Evaluation, Testing, and Recommendation

# II. Scope of Support (Nature of Delivery)

The Technology Manager will have the challenge of ensuring that each of the 5 Technology Initiatives are constantly maintained for each of the assigned KWR Market Centers. The maintenance of these Initiatives is delivered by performing a range of services. The HHT-Service Plan is documentation that describes the attributes of these services. Scheduling, stipulations, responsibilities, and limitations of design-or-cost are the primary attributes that determine the *Nature of Delivery*.

- [KWR Market Center Equipment](#)
- [KWR Market Center Administration](#)
- [KWR Agent Equipment & PC's](#)

## 1. Hardware and Software Support for KWR Offices and Agents

Designed to provide KWR Administration and Agents with problem determination and resolution of hardware and software problems on a per incident bases. The Technology Manager will respond to requests with various amounts of urgency and scheduling. The determination of which is based on judgments of how many users are affected by an issue, to what extent they are affected, and the date/time of the request. The *Average Response Time* can be determined by the [Severity Level](#).

	KWR Market Center Equipment & Administration Support
Core Coverage (9a/5p/M-F)	<ol style="list-style-type: none"> <li>1. All Hardware and Software to be supported will be identified during the <i>Site Survey</i> (<a href="#">Startup Phase</a>) of the <a href="#">Integration of Services</a> section. (This includes Printers, Scanners, Copiers, PC's, etc)</li> <li>2. The Technology Manager is scheduled to a different Market Center every day, yet remains responsive to requests from all 4 Market Centers in the Service Area Monday through Friday.               <ol style="list-style-type: none"> <li>1. <a href="#">Face to Face Response and Support</a> is available on the days that the Technology Manager is scheduled onsite</li> <li>2. <a href="#">Remote Response and Support</a> is available when the Technology Manager is previously scheduled at an alternate Market Center.</li> </ol> </li> <li>3. Purchase of Software and Updates will be conducted within the policies and procedures outlined by each Market Center's Administration.</li> <li>4. New and Replacement Hardware, Parts, and Equipment will also be conducted within the policies and provisions outlined by each Market Center's Administration.</li> <li>5. Perform regular backups of data and settings on <a href="#">Key Systems</a>.</li> </ol>
Off Shift (5p/9a/M-F) (WeekEnds)	<ol style="list-style-type: none"> <li>1. Unplanned outages and equipment issues disrupting business functionality of multiple users.</li> <li>1. Projects that require system(s) shutdown for repair/add/move/change requests.</li> </ol>

KWR Agent Consultation & Equipment Support	
Core Coverage (9a/5p/M-F)	<ol style="list-style-type: none"> <li>1. <a href="#">Non-Billable Consultation and Problem Determination</a> available to any Agent requesting assistance during Core Coverage Hours on the day that the Technology Manager is scheduled to work at the Agent's Market Center. <i>(This service is available at the Market Center Only – On the Scheduled Day Only)</i></li> <li>2. <a href="#">Non-Billable Initial Contact – Best Effort Resolution</a> is given to any Agent contacting the Technology Manager during Core Coverage Hours, even if NOT on the scheduled day for the Agent's Market Center.</li> </ol>
Off Shift (5p/9a/M-F) (WeekEnds)	<ol style="list-style-type: none"> <li>1. <a href="#">Billable Consultation and Problem Determination</a> available through contract labor, charged at an hourly rate.</li> <li>2. <a href="#">Non-Billable Correspondence and Dialogue</a> on existing issues may occur during Off Shift Hours at the Technology Manager's discretion and upon the manager's availability.</li> </ol>

## 2. Network and Domain Administration for the KWR Market Center

Each Market Center maintains different requirements for Network Support, however the Network and Domain Administration Initiative is effectively the same throughout the region: Provide authorized users with reliable access to the tools and data stored on the LAN and Server.

Network and Domain Administration	
Core Coverage (9a/5p/M-F)	<ol style="list-style-type: none"> <li>1. <a href="#">Rapid Response Policy</a> to address unplanned outages or issues that interfere with the business functionality of a Market Center.</li> <li>2. Administration of Simple Networking via Peer-to-Peer can be supported with security and connectivity within the limits of design.</li> <li>3. Administration of Domain Networking via Active Directory and Group Policy Objects is the preferred method of management.</li> <li>4. Connectivity to Workstations and Network Resources (Printers, Scanners and Data)</li> <li>5. Configuration of Firewall Settings in response to the changing requirements of <a href="#">Common Web-based Software</a>.</li> <li>6. Management of Wireless Access Points with 64bit Encryption (<a href="#">WEP</a>).</li> <li>7. Perform regular backups of data on KWR Network Shares.</li> </ol>
Off Shift (5p/9a/M-F) (WeekEnds)	<ol style="list-style-type: none"> <li>1. Rapid Response Policy</li> <li>2. Projects that require system(s) shutdown for repair/add/move/change requests.</li> </ol>

### **3. Training**

Training will be provided on a regular basis, onsite at each Market Center.

Curriculum is to be based on a Needs Analysis derived from user requests, polls, and feedback obtained from KWR Administration Staff Members and Agents. The focus of training will range from New Agent Technical Orientation to the training and retraining of KWR Administration and Agents. Types of Training will be One-on-one instruction, Classroom-Instructor-lead, and Self Paced.

The Technology Manger will remain committed to understanding and testing current and future Technology. Special attention will be given to how technology relates to the Real Estate Industry. So that information and Training is consistently shared, the curriculum will be propagated throughout all Market Centers participating in the HHT-Service Plan. Every KWR Administration Staff Member and Agent will be given the opportunity for Technical Training.

### **4. Vendor Management**

The size of the Technology Support operations and the uneven demand for Technology services influence the type and amount of outside services that will be required. The Technology Manager will engage as a liaison between the Market Center Administration and respective Vendors. All current obligations with any given Market Center and existing outsource vendors will be identified during the *Site Survey* ([Startup Phase](#)) of the [Integration of Services](#) section. The Technology Manager will also recommend additional Vendors to provide services that can not be provided by H&H Tek because of productivity goals, limits of cost-and-design, and or scope of expertise.

### **5. Planning, Project Management & Growth**

One of the greatest advantages of having a Technology Manger is that this individual will be able to supply solutions and insight that will accelerate the Market Center Staff and Agents' understanding of technology. As the KWR Administrative Management forecasts and reports growth of the organization, the Technology Manager will lend experience and expertise in the Market Center Planning and Project Management as it pertains to the [Scope of Support](#). KWR Agents will have the opportunity for one-on-one Planning, *Project Management & Growth* consultation with the Technology Manager.

# III. Continuous Improvement Program

Utilizing technology as a tool to increase productivity is a key to gaining the most from technical support. With this in mind, it is our philosophy that a commitment to quality and improvement is essential. Regular training, Q&A sessions, and one-on-one consultation provide a conduit for KWR Administration and Agents to communicate feedback and suggestions while every effort will be employed to integrate current and traditional IT practices and methods into daily technical operations. When the Technology Manger enters into the *Business as Usual* phase of implementation the *Continuous Improvement Program* will provision for a proactive and high priority response to the constantly changing needs of the Market Center's technical support requirements.

The need to decommission exhausted or legacy equipment and technologies requires close attention to the emerging next generation.

# IV. Market Centers

The location and recipients of support performed by the Technology Manger will revolve around the Market Center pods. A basic pod will consist of 4 KWR Market Centers, each schedule for a weekly onsite visit from the Technology Manager. The role of the manager is modeled after a traditional internal support consultant to the pod. Every member of the KWR Administration Staff and Agents will have equal opportunities to benefit from the HHT-ServicePlan. The priority of response to the pod will be determined by Severity Levels and day / time (Core Coverage) of the request.

In addition to the 5 Technology Initiatives, the Technology Manager will generally maintain two modes of response, based on 2 agendas.

## **Agenda 1 : Market Center and Office Staff response**

Market Center initiatives are obtained from ALC, MCA, TEAM LEADERS, Technology Committee, Technology Manager's discovery and Agents (via proper channels).

## **Agenda 2 : Individual Agent response**

Four 45 minute time slots are available throughout the business day to schedule one-on-one Agent Consultation.

Issues are either resolved or pended during the 45 minute consultation. It is the discretion of each Market Center's administration to either allow or disallow consultations.

Basic PC configurations are given verbally upon request when onsite.

# V. (Market Centers) Core Coverage

The management of the 5 Technology Initiatives will be most visible during the Core Coverage hours. The hours are framed around a 5 business day week with each day starting at 9am and ending at 5pm. The Technology Manger will operate onsite at an assigned Market Center during the Core Coverage hours while remaining available to the entire pod by email or cell phone. In order to consistently be available to the KWR Administration and Agents, the business day will need to be divided into categories of 'Agent Response' and 'Market Center Response'.

The Technology Manger will rely on a schedule dedicating half of the business day to the needs of the Market Center equipment, software, network, and staff members while the other half is reserved for four 45 minute consulting sessions available to KWR Agents. During Core Coverage hours, the Technology Manager will give a priority response to the Market Center assigned for the day. The consulting sessions will be reserved exclusively for the agents listed in the Agent Roster of the Market Center assigned for the day.

## Off Shift Response for Market Centers

The Technology Manager will be responsive to outages and issues that interrupt a Market Center's ability to maintain business functionality. Some of these incidents will inevitably occur 'Off Shift', outside of the Core Coverage hours. The Technology Manger will remain responsive to such Off Shift incidents and will respond according to Severity Level.

# **VI. (Market Centers) Integration of Services**

As soon as a Technology Manager has been assigned to a Market Center pod, the process of integrating support services will begin. This process is completed in three phases, finally arriving to a state of 'Business as Usual'. The Startup Phase will focus primarily on identifying the exact needs of each Market Center so that the Planning and Implementation results in the delivery of a technical support service that is custom tailored for the pod.

## Startup Phase (First 30 days)

1. Market Center Onsite Survey
2. Needs Analysis
3. Budget Alignment
4. Vendor referral

## Implementation Phase (First 30 – 60 days)

5. Planning of Services and Delivery
6. Testing of Process and Services
7. Rollout the Service Plan

## Business as Usual / Maintenance Phase (On going)

8. Planned Services and Procedures becomes policy of the Market Centers
9. Services are delivered consistent with Planning and Implementation
10. Continuous Improvement Plan Begins

# **VII. (Market Centers) Vendor Management**

Supporting the 5 Technology Initiatives for the Market Center pod will require the coverage of a broad range of technologies and skill sets. The Technology Manager will routinely manage the delivery of services except when limited by cost-or-design, technical expertise, and / or pre-existing vendor agreements. Under such circumstances the manager will lend assistance in selecting vendors while managing beneficial vendor relationships. Execution of all outsourced contracts should be conducted by designated KWR Administrative Staff and not by the Technology Manager.

Participation in the official request for information, request for bid, planning, or purchase of services from 3rd party vendors will be conducted under the review of the Market Center Administrator or KWR Management.

# VIII. Agent Consulting

”How much do you charge to come out to my house?”

One of the most frequent questions from KWR Agents and Staff has been requests for service to their home or private equipment and pc's. There are various scenarios that lead to *Agent Consulting*. The most common are incidents where problem resolution requires a lengthy time frame or when the service has been planned to occur at an off-site location. Agent Consulting is a direct response to the overflow of KWR Agent consultation & equipment support requests that exceed the limits of *Core Coverage*.

The Technology Manager will maintain non-billable consultation and problem determination with any agent throughout the *Core Coverage* hours and will determine when due to urgency, scope of support, or length of time, a support request should be handled by a contract technician during 'off-shift' hours. The manager will advise the agent of this determination at which time the agent can request to contract a consultation through H&HTek. The Technology Manager will be able to full-fill a percentage of the contract opportunities while a team of qualified HHT Field Technician responds to the majority. Dispatch information and a Schedule of Services can be obtained at [www.handhtek.com](http://www.handhtek.com) .

# IX. Agent Consulting (Nature of Contract)

Our Agent consulting services have become very popular throughout the offices currently participating under our service plan. H&H Tek has been fortunate enough to be in the position to recruit professional and seasoned technicians looking for opportunities to contract technical services.

When problem determination suggests the need to contract a technician, we use a dispatch system that is managed by a logistics coordinator with the main responsibility of matching problems and support needs to the skill sets of our technicians.

Services eligible for contracting include but are not limited to the following:

- PC desktop and laptop repair and trouble shooting
- Software configuration and analysis
- Web design and development
- Virus detection and removal
- System re-loads
- Backup solutions

Our rate for services is \$85 per hour. Each contract is scheduled ahead of time and the Technician, Agent, and Dispatch keep a copy of a field ticket that is used for billing and records purposes.