

# Secrets of Workforce Management

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# Secrets of Workforce Management

**Volatility & Flexibility**  
Work-life-integration



**Operational Effectiveness**  
Creating the right culture to learning and be proactive

**Analysis & Forecasting**  
Creating insight which drives performance



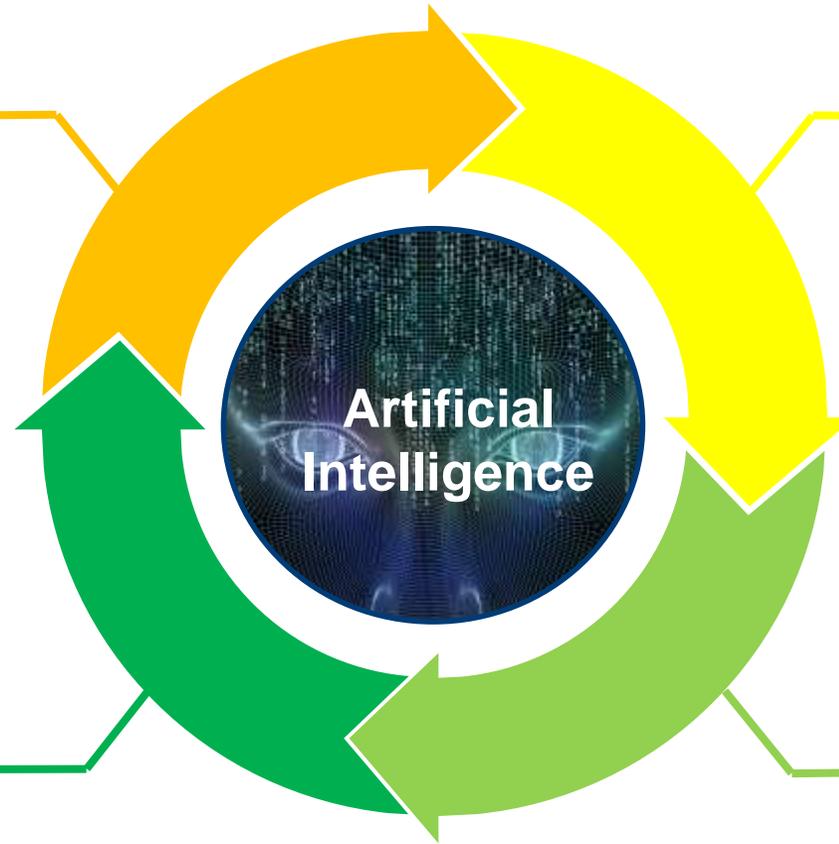
**Underpinning Best Practice**  
Embedding excellence and learning

*Analysis and understanding of our customer along with the volatility of our workloads can help create the right contact and flexibility strategy to become more operational effective*

# Analysis & Forecasting

Data &  
accuracy  
expectation

Trends and  
problem  
identification



Collaboration

Scenario  
analysis

# Analysis & Forecasting

## Top Tips

- Move away from siloed forecast models and clearly demonstrate the work flow impacts across different channel types.
- Build on the strength and understanding of more established channels and apply those principles to back office, Branch/Retail and field networks.
- If you have no historical data, perhaps a new channel/product is being launched? try a judgemental method – The Delphi method
- Ask the right questions of stakeholders to draw out business impacts and ask questions of our data so we can form the right conclusions

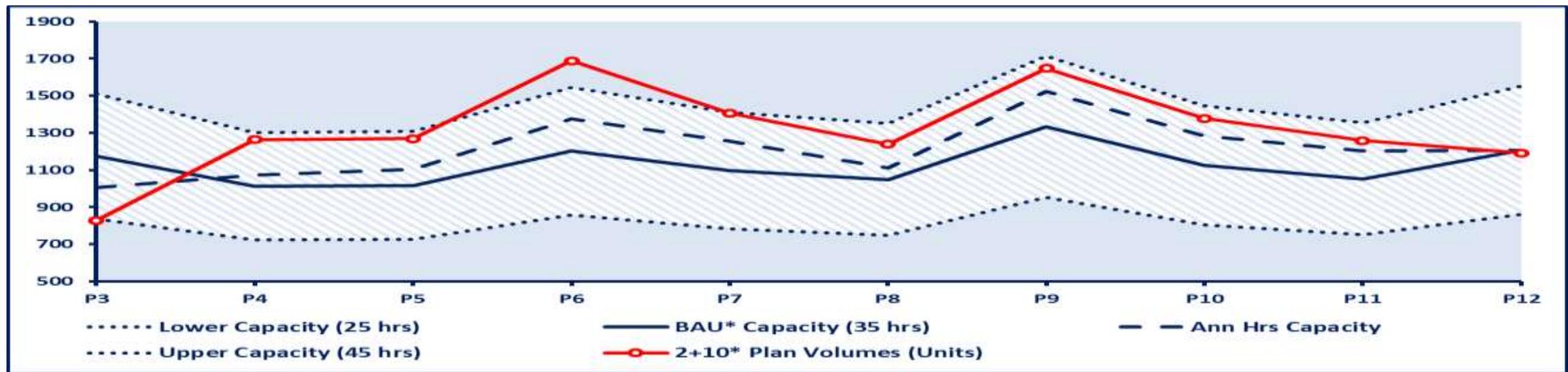
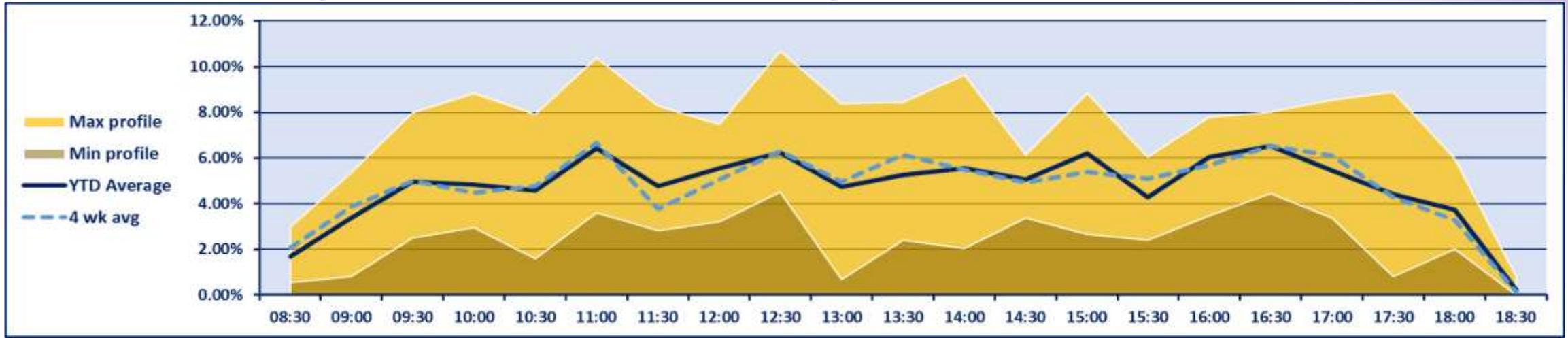
## Best-in-class characteristics

- Analysts work closely with stakeholders to operationalise volumes and shrinkage, turning the volume and supply forecasts into meaningful actions – Leading the way that these factors are managed and planned for.
- Planning is involved in all areas of the business – inbound, outbound, back office, digital and retail branches. Forecast and demand plans are joined up giving a truly holistic view of the operation.
- The capability to connect data from different systems, channels, and outcomes within the customer journey.

# Volatility & Flexibility



# Volatility & Flexibility



- BAU (Business as Usual)
- 2+10 (2 month actual + 10 months forecast)

# Volatility & Flexibility

## Best-in-class characteristics

- Build a robust historical dataset capable of informing profiles; provide key lessons that enable data driven decision making.
- Establish variability of your forecasts, understand your standard deviation, how flexible do you need to be.
- Understand how interactions and links between different channel types presents an opportunity for flexibility – Improve business understanding and integrate plans across channels.
- Explore scheduling strategies; self service; the balance of scheduled versus non scheduled activity - Guaranteed Holidays?

# Operational Effectiveness



**Culture**

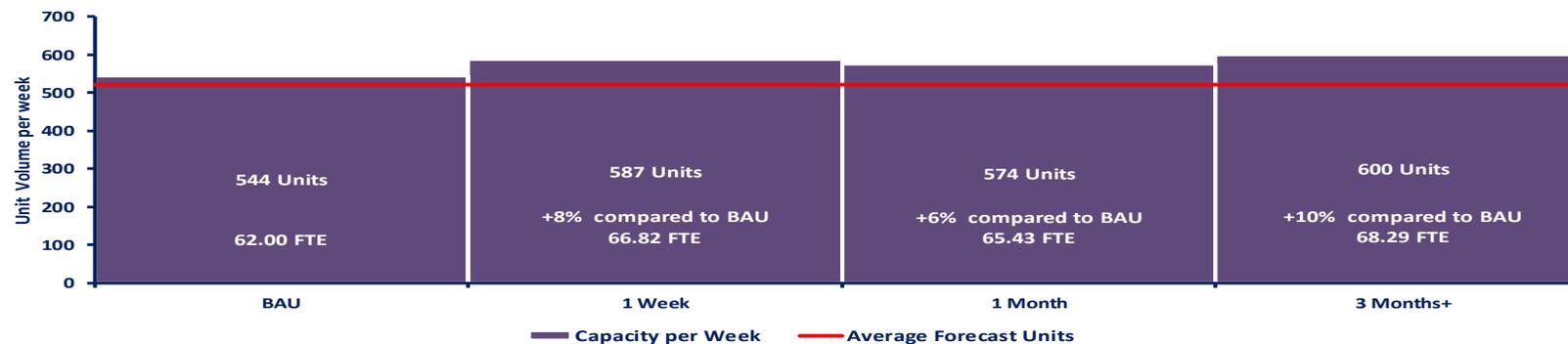
**Incident  
Management**

**Analytics & Communication  
automation**

**Learning &  
Planning Improvement**

# Operational Effectiveness

PJM avg position Q2 of 2018	BAU	1 Week	1 Month	3 Months+
Supply	Flexibility Options	Annualised Hrs @ 45 Shrinkage @ 8% Overtime @ 1 hr p/FTE	Annualised Hrs @ 40 Shrinkage @ 18% Overtime @ 1 hr p/FTE Temps	Annualised Hrs @ 40 Shrinkage @ 20% Overtime @ 1 hr p/FTE Temp/Perm Recruitment Other Dept. staff swing
		Potential Uplift	+8% compared to BAU	+6% compared to BAU
Supply	62.00 FTE	66.82 FTE	65.43 FTE	68.29 FTE
Unit Capacity per week ... per day	↓ 544 109	↓ 587 117	↓ 574 115	↓ 600 120
	Avg Forecast Units per week	521	521	521
Considerations:	<ul style="list-style-type: none"> <li>• Supply figures are for Unit processing staff only.</li> <li>• Volumes are Unit (Unit a &gt; Unit d) only and exclude Unit e volumes</li> <li>• Annualised hours, Overtime &amp; Shrinkage become less effective the longer they are used</li> <li>• Temps can only be utilised on certain Unit a. Use of temps assumes that existing staff are then freed up for Units b-d</li> <li>• Use of temps within 1 month assumes we can recruit them at short notice. Temp availability will vary through the year</li> <li>• Recruitment lead times, training times and proficiency / effectiveness levels apply for workload</li> <li>• Other Dept. staff swing assumes a 50% effectiveness due to the time lag in training them on systems</li> </ul>			

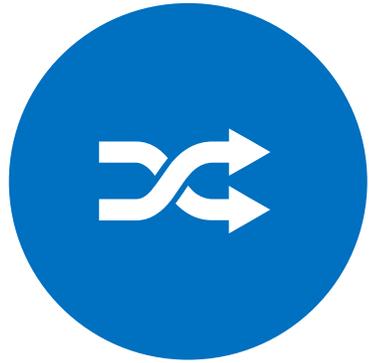


# Operational Effectiveness

## Best-in-class characteristics

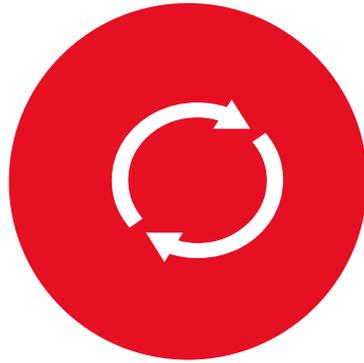
- Fundamental to operational effectiveness is having pre agreed plans, i.e. 'Triggers for Action' with stakeholders on how to optimise resource and workflow/routing systems.
- Ability to reforecast on the day and intra week based on actual activity, allowing teams to be far more proactive in their approach and plan and co-ordinate activity over coming days.
- Real time teams working in partnership with the operation using real time information in a timely manner, use of wallboards, tableau, to get information to key people real time, not an hour later.
- Able to explain how changes to key parameters affect performance (service level, wait times, occupancy) and generate opportunities for improving performance.

# Underpinning Best Practice



**Change  
Management**

t



**Continuous  
Improvement**

t



**Stakeholder  
Influence**



**Best  
Practice**

**Pitfalls to avoid!**





## Keynote presentations

**Innovation Awards Case Studies,  
hear from our 10 award finalists**

**Technology Showcases,  
see the latest technology**

## Topic based practical workshops

**Networking with the Planning, Quality, Insight  
and Leadership communities**

# Releasing Potential



# Secrets of Workforce Management

Thank you for listening

Please contact me if you have any questions:

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 #ForumConf