Greenop Pty Ltd presents:

Forecasting and Scheduling Services

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Forecasting and Scheduling

We provide a variety of services for our clients, all tailored to meet their specific need. Variations include:

- Review of current Forecasting and Scheduling Processes, and determine options to improve existing processes.
- One off forecasting of call volumes and staff required for individual skills for a specific time period (eg 6 months) to the half hourly level.
- Regular updates to forecasts
- Outsourcing of the entire forecasting and scheduling process
- Coaching and development of your existing or new Resource Planners.

Benefits

The goal of the review process is to reduce FTE dedicated to manual reporting, to utilise the independent expertise of Greenop Pty Ltd, and improve decision making through utilisation of better forecasting.

Benefit of outsourcing forecasting and scheduling production include reduction of in house FTE, and refocus of current FTE to change management and a communication focus instead of numerical focus by existing staff.

The following is an example of a full review, the structure and content:

Phase 1 – Initial requirements assessment. The intent is to determine current status of forecasting, scheduling and reporting in the contact centre and outlets, and provide recommendations and design processes to improve management information and resource planning. Specific areas to be addressed:

<u>Forecasting</u>

- Determine stakeholder needs

- Forecasting methodology and variability, particularly "business as usual" scenario

- Contact pattern analysis (long term and short term) including normal deviation

- Abnormal event identification in historical data

- AHT analysis including patterns, and comparison with targets including frequency distributions and standard deviations.

- Analysis of shrinkages for long term and short term planning

- Recruitment time lag and recruitment decision making in conjunction with known business changes and attrition analysis

- Communication needs with and between change initiators

- Present new models and findings for agreement and fine tuning

Scheduling

- Identify current scheduling process and methodology, including strengths and weaknesses

- Perform gap analysis on existing Enterprise Agreement or Award and the actual scheduling environment.

- Determine current short term over and under staffing to half hour level for sample week as a base line.

- Analyse full and part time FTE ratios and fit with current staffing forecasts of requirements

- Interview sample Centre Managers and Team Leaders to determine their perspective on scheduling issues.

- Analyse available exit interview and employee opinion survey issues relating to scheduling.

- Design ongoing schedule review process (eg twice per year at daylight savings), incorporating communication with staff

- Analyse unplanned absence communication process for robustness of capturing all unplanned absences

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<u>Reporting</u>

- Establish actual reporting requirements through interviews with stakeholders including data and format
- Determine technology limitations on reporting
- Design automated reporting with the philosophy of "help yourself"

<u>Real Time Queue Management</u>

- Analyse ASA and abandon rate correlation to determine trigger points
- Facilitate workshop to identify actions taken at trigger points to protect service level.

Phase 2 – Build. The intent of this phase is to address the issues identified in the initial analysis, and to commence process and forecasting methodology build. Sample areas:

- Forecasting models and data feeds
- Stakeholder communication and business decision timetables
- Commence scheduling review and implementation, and timetable future reviews
- Implement Real Time Queue Management processes
- Reporting – build suite, check for accuracy and useability.
- Unplanned Absences reporting – build, train team leaders and communicate
- Design new job descriptions for support roles affected by this change.

Phase 3 – Outsource Decision. The intent of this phase is to determine whether the forecasting and scheduling function can be better performed in house or by Greenop Pty Ltd. Examples of potential functions outsourced:

- Scheduling reviews (eg in line with Day light savings)
- Creation of long term forecasts monthly or bi-monthly
- Creation of short term forecasts weekly (52 weeks per year)
- Review of reporting needs (eg 6 monthly in line with KPI reviews

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