



Optimizing the Customer Experience With Planner

How Q-Flow[®] Planner helps reduce branch operation costs, improve the service level, and increase sales in the branches.

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Q-Flow® Planner is an optional component, which can be integrated with Q-Flow versions 5.1 and up in order to plan agent staffing. It was designed specifically for services provided by multiple agents having similar skills (such as bank tellers, general service agents at a cellular company's customer service center, medical secretaries at a large medical unit, and so on).

This product has several potential uses, contributing to the three major branch management elements on which Q-nomy focuses: reducing branch operation costs, improving the service level, and increasing sales in the branches. This article describes these uses in detail.

For more information about [Q-Flow](#)

Planning staffing with Q-Flow Planner

Let us review the basic principles of utilizing Planner. The application includes the following:

- Worksheets for planning staffing levels
- A mathematical engine that predicts service levels and calculates the optimal staffing levels
- Analytic tools that calculate relevant parameters
- Creating What If scenarios and sensitivity analysis

These tools enable the user to analyze relevant data, stored in the Q-Flow Database, especially demand and customer arrival rates, service times, agent availability and customer patience factors, and manipulate data in order to predict changes (such as a future increase in demand).

Based on these parameters and capabilities, the system can predict the required staffing levels for different units, throughout different times of day, in order to fulfill the organization's service level goals. Needless to say, this calculation is anything but trivial, taking into consideration more than mere work capacity. It is based on Queuing Theory, and therefore the higher one sets the service goals (i.e. shorter waiting times), the more agents will be required.

The system also allows the user to manipulate the required staffing results manually, in order to reflect different constraints that force deviations from the recommended staffing (such as shift planning requirements or physical limitations of the service area). At the end of the process, Q-Flow Planner will indicate the influence of those manipulations on the service level parameters, and point out any impact on the desired service levels.

Using Q-Flow Planner to Reduce Costs

An organization that wishes to reduce the operational costs of its branches, can take one of two approaches.

The preferred method would be to define the desired increase in efficiency using service level parameters. Meaning, the organization would establish what minimal resources should be allocated to the branch, in order to maintain a certain level of service.

Another option, which may be the only available one when facing severe budget constraints, is to establish a feasible budget and then examine its effects. In other words, "The maximal budget that can be directed to the branch is X, now let's find out what is the impact on the service level and attempt to deal with it."

Whichever of the two methods you use, Planner offers a great contribution.

In the first method, the organization can use Planner to calculate the minimal staffing required to achieve its service level goals. Out of the required staffing, you will also be able to calculate derived parameters, such as the number of service desks, computers and equipment required for agents, floor space required for the waiting area, and so on. The calculated result is optimal, meaning other staffing level calculated by any model or based on evaluations will necessarily be higher (and therefore, more expensive) or will result in failing to accomplish the organization's service level goals.

Using the second method, you can utilize the Planner to integrate demand data and other branch service parameters with the staffing level your budget allows. The system will provide an accurate prediction of different parameters, such as the service level, queue length, and number of abandoning customers. This enables the organization to spend its budget sensibly. For example, if the system predicts a decrease in service levels, the organization will be able to take preventive steps by sending customers letters explaining the situation, investing in self-service channels, advertising recommended visiting hours (when lines are typically shorter) on the website, and so on.

Another way to increase efficiency is to compare Planner recommendations between different service types, units, and branches. Planner can assist in discovering imbalances in resource allocation. For example, we may find out that the budgeted staffing for one branch will enable it to achieve its service goals, while another branch will fail to achieve that with its current staffing allocation. Since most organizations aspire to equalize their branches (in order to prevent claims of discrimination of certain geographical areas, among other things) the application will help the organization to allocate means to close these gaps, using resources already available in the branches. This, without increasing the budget.

Using Q-Flow Planner to Improve Service

The Q-Flow system provides various tools and methodologies for enhancing service in the branches. Q-Flow Planner adds several important means to this end.

The first improvement Planner has to offer is in fact the other side of the economizing coin. Meaning, the same tools that were discussed on the previous sections as means of saving work force and budget, are also used to improve the service level. The organization can use the software to examine the question "How many workers should we add in order to increase the service level by X".

As we noted above in the context of increasing efficiency, smart use of Planner is based on examining different units and branches concurrently in order to balance and employ existing resources. We may discover that targeted changes in resource allocation between different units can enhance service levels without increasing the original budget. For example, we may find some service units are less busy now, thanks to the addition of new self-service channels, but their staffing is not yet updated, or only partially decreased. Such units can be used as sources for redirecting existing work force to areas where face-to-face service should be upgraded.

Generally speaking, using Planner allows the organization to optimally slice its budget pie, in light of the organization's list of priorities (i.e. to regulate the work force in favor of improving service to priority customers and services with potential marketing value).

In addition, combining the Planner with Q-Flow's real time monitoring tools enhances the organization's service level management. For example, the branch manager can be alerted when actual staffing is lower than that recommended by Planner. Needless to say, such an event decreases the service level. Once receiving this alert, the manager will be able to promptly handle the situation – by calling agents who are on break back to their stations, transferring agents from other departments, and so on.

Using Q-Flow Planner to Boost Sales

On top of all the issues that were discussed in this document, Q-Flow Planner also has the potential to boost sales in the branch.

Branch sales may be conducted at the front desks, as part of the queue management process, or in the back office – via telemarketing or customer data reclamation for the marketing departments. The branch may also handle other activities that produce income for the organization, such as contacting customers with outstanding bills or customer retention activities.

As for front desk activities, increasing sales is derived directly from setting service goals and optimal staffing of sales and service counters. Planner allows mobilizing personnel between the service and sales counters, or between departments dealing solely with service to those where services are provided as basis for up-sale offers.

In addition, using Q-Flow Planner to plan staffing enables the organization to allocate employees for back office tasks more efficiently. The application allows you to split the workday of each of the agent optimally, in order to perform both front desk and back office tasks. This enables the organization to achieve the equilibrium where each employee contributes the most to the organization, by performing back office tasks while maintaining the service levels goals set for the front desks.

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