



Create a Forecast

Resource Planner Education

by Resource Planners

This course is for people aiming to develop their initial skills in Inbound Contact Centre Resource Planning.

The tools and techniques that you will learn in this course will assist you in predicting customer contact volumes and the associated staffing requirements. There is no one defined or standard methodology to produce a contact centre forecast, as there are numerous variations in skill sets, contact volume drivers, timeframes, available data and predictability of patterns. As a result, you need to make a careful choice as to how you are going to apply new skills, tools and techniques in your workplace.

At the end of this course you will have:

- Analysed your data for patterns
- Created a presentation on your forecasting patterns, and presented this to your decision makers
- Produced a contact volume, AHT and staffing forecast for a week sometime in the next 6 months (dependant on your data availability)
- Created a presentation on what you are going to do differently on return to work, and present this to your decision makers

For further information please contact:

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Course Details

- This training course is a hands-on, Microsoft Excel based, learning experience.
- It is run in small groups of up to 4 participants, to ensure quality learning outcomes.
- Each student uses their own data to analyse, and to create forecasts.
- Training is held on non-consecutive days, to allow students time to return to work, communicate and gain agreement on patterns to include in the forecast.
- Optional coaching sessions after Day 2 can also be conducted, to ensure that the concepts have been understood and are in use.

Course location

- This course is held in-house (I will come to you). You will need a training room with PCs loaded with MS Excel and PowerPoint, and access to an Erlang C website on the internet.
- Alternatively we can hire training facilities for you.

Course Pre-requisites

Students must have

- access to Contact Centre data
- A good knowledge of MS Excel (including formulas)
- A basic knowledge of MS PowerPoint to update presentations.



Course Outline

Session – DAY 1	Content	Outcomes
Pre-course	Data requirements requested Gather data and information Book presentation time with management team between Day 1 and 2	Preparation for class attendance Calendars booked for presentations between Day 1 and 2
Session 1 “Analyse, not diagnose” Day 1 Morning and after lunch	Introduction and course overview Introduction to pivot tables Identify historical data patterns <ul style="list-style-type: none"> • Week of month • Day of Week • Time of Day • AHT • Growth rates 	Perform analysis on own data Identify abnormal events Identify reoccurring patterns Identify potential growth rates
Session 2 “Presentation preparation” Day 1 Afternoon	Create communication pack Present communication to class Business Change and impact on forecasts Shrinkages Prepare for return to work	Completed PowerPoint presentation Practice presentation skills in communicating complex ideas Identify change initiators to communicate with Identify shrinkage categories for discussion
Daily Wrap up		



Session – DAY 2	Content	Outcomes
At work	Present findings to management team Decide on patterns that are reoccurring Determine change initiatives, effect on AHT, Contacts and shrinkages Gather shrinkages Gather Grade of Service Target Gather planned rosters for target week	Agreed patterns for forecasting Agreed change initiatives to include in the forecast Agreed shrinkages Agreed Grade of Service Target Practice presentation skills in communicating complex ideas
Session 3 “Finalise forecast inputs” Day 2 Morning	Welcome and review of Day 1 Feedback on success of presentations Update and finalise patterns Identify special days Finalise change initiatives to include in forecast Create forecast	Excel spreadsheet containing forecast elements Completed forecast
Session 4 “Create forecast, finalise presentations” Day 2 Afternoon	Create forecast incorporating forecast elements Create pivot tables and charts Comparison of schedules and base staff Determine accuracy limits Prepare Forecast output Presentation Prepare Recommendations for Change Presentation Present Forecast output	Excel forecast containing forecast elements Erlang C curve Presentations Presentation Practice
Daily Wrap up	Overview of course Course Feedback Set time for coaching sessions (if applicable)	Consolidate learnings
Return to work	Students presents outcomes Team or Manager	Major Learning communicated Practice presentation skills in communicating complex ideas
Coaching (optional add on)	Individual coaching on topic of choice.	Area of choice worked through together



About Greenop Pty Ltd and Jane Greenop

Established in 2001, Greenop specialises in Resource Planning. Clients have included State Government, Health Insurance, Banks, Insurance and Financial Services, Ticketing, Outsourcing, Publishing, Pharmaceuticals, Telecommunications companies and Local Government in Australia and Asia.

Jane Greenop has been involved in Contact Centres since 1993. Major career achievements include:

- 4.5 years with a NSW State Government Authority leading Resource Planning for Customer Service. Achievements include:
 - Procurement, process design and implementation of Work Force Management Systems for Contact Centre and Branch Network
 - Procurement, process design and implementation for Ticketing system for Branch Network
 - Design and implementation of Scorecard Reporting
 - Design of Forecasting process for non-real time customer work
- As a Contact Centre Manager in the Banking Sector, Jane managed a 24/7 170 seat contact centre
- As a Forecaster in the Banking and Telecommunications Sector, Jane provided forecasts for large (up to 800 seat) call sharing pools, and long term forecasts leading to effective business planning and recruitment decisions.

Jane's qualifications include:

- Masters of Management (Macquarie Graduate School of Management)
- Bachelor of Business (University of Technology, Sydney)
- Certificate IV in Workplace Assessment and Training
- PRINCE2 Foundation
- PRINCE2 Practitioner