## Using Shiftboard's Demand Planner

The Demand Planner can help you use your forecast data to create shifts on your Calendar for a specific Workgroup (Team). There are many steps to using this feature, but once you understand how they all fit together the whole process can be done in just a few minutes. The steps in this document will help you use the Demand Planner and explain the various settings along the way.

- Go to the Calendar page and click New, then the "Use Metrics: Shift/Demand & Planning Tools" option.
  - This starts the Demand Planning tool.



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- 2) You'll need to download the Demand Planning Template to your computer and open it in a program like Excel
- 3) Fill out the columns with data from your ACD or your forecasted tasks.
  - a. Date is the day that you're scheduling. In our example there are several entries for 5/5/16 because the volume changes throughout the day.
  - b. Time is the part of that day for which you're inputting data. In our example we have volume data for each hour.
  - c. Duration is the amount of time, in minutes, that the volume data applies to. In our example this is consistently 60 minute intervals.
  - d. Mean Service Time is the amount of time (in seconds) each task (call) will take from the time the worker starts the task until they're ready for the next one. In our example tasks consistently take 5 minutes (300 seconds).
  - e. Volume is the number of tasks that the Workgroup (Team) will be expected to handle during the time interval. In our example the contact center is expected to receive 45 calls between 9am and 10am on 5/5, then 50 calls between 10am and 11am on that same day, and so on.
    - i. Your worksheet can contain data for several days. The Duration can be as small as 15 minutes or as long as several hours. Durations and Mean Service Times don't have to be consistent, but for most organizations they are uniform.
- 4) Once you're finished filling out the worksheet, save it to your computer, then use the Choose File to tell Shiftboard where it can be found.

- 5) Now you can indicate the Service Level in the Template Settings area.
  - a. You can choose to either assume that tasks have an average amount of wait time (how long the average person will be on hold) or to use a service rule where an indicated percentage of tasks will be waiting less than a certain amount of time (for example, 80% of callers are on hold less than 20 seconds).
  - b. Check "Expect gaps between some time intervals" if there are gaps between rows in the worksheet longer than the value in the "Duration" column.
     If you have 24-hour coverage and data for every minute of the day in the worksheet you don't need to check this box. If your contact center is closed at some point (our example contact center is open 9am to 8pm) you'll need to check this box.
- 6) Once you've set all of the options and selected the file, click the Calculate Positions button. You'll now download a new file that is similar to, but not identical to, the file you just uploaded to Shiftboard. Once you have that file, click one of the Shift Planning Tool links.

Data Upload Manager	
Shiftboard Webinar: Call Centers > Data Upload	
Uploading Data Demand Planning Schedules Revenue/Forecast Data Manager Notes Roles Team Memberships	Available Templates
Demand Planning > Staff Optimization	Demand Planning Template
About demand planning /our workload (i.e. volume of calls or tasks performed during a period of time), along with the average length of time required to resolve your tasks, can be used to compute the optimal number of staff needed for various levels of	Shift Planning - Schedule Optimization
First, complete a <u>Demand Planning Template,</u> set the desired <i>Service Level</i> metric, and the below. You may already have an Automatic Call Distributor (ACD) or other software tool that can provide you with these data on a daily basis.	
When you click "Coconate roadiese" you'll get a percapreadsheet with your optimal staff quantites that can be uploaded directly into the <u>Shift Planning Tool</u> .	
Template Settings	
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Enter one of the following:	
Seconds of wait time (average).	Ad-Hoc Positions Calculator
% of tasks wait less than 60 seconds.	
Expect gaps between some time intervals	
File to Load: Choose File Step1-ShiftbngUpload.xls	
Calculate Positions Cancel	

- 7) The new file will now have a Positions column. This is the number of positions that Shiftboard has determined will need to be filled during this interval in order to handle the volume you entered at the Service Level you indicated.
  - a. Most organizations don't need to make any changes to this document, but if you are working with a small group and don't have enough employees to staff all of the positions that the Demand Planner has indicated you could override the system by changing the number of Positions at this stage.
  - b. Some contact centers are required by their clients to maintain a minimum number of seats dedicated to them at any given time, so you could also increase the number of Positions at this step to meet any required minimums.
- 8) Just like before, you'll save this file to your computer, then use the Choose File option to tell the Demand Planner where to find it.
- 9) Next you'll enter the Shift Information in the Template Settings area
  - a. Lead Time is the amount of time after the beginning of a shift that your workers have before they start handling tasks.
  - b. Check Existing Schedule tells the system to take into account people who are already working for this Workgroup (Team) and reduce the number of new Positions required at each interval by the number of people already scheduled to work.
  - c. Team (Workgroup or other grouping) is the group that you're scheduling based on the data that you're providing.
  - d. Set some rules for how the Demand Planner will create the shifts
    - i. Setting the Minimum and Maximum duration will tell the Demand Planner to make longer shifts whenever possible, but to handle spikes in the number of tasks by bringing on additional workers for as little time as possible.
    - ii. Use Shift/Coverage Blocks for this Team will tell the Demand Planner to only use Shift Blocks that you've defined. Shift Blocks are a great way to quickly add regular shifts without needing to create them from scratch every time and the Demand Planner can use these as well.
  - e. If you had to check "Expect gaps between some time intervals" before, check it here as well.

10)	Click the Calculate
	Shifts button at the
	bottom of the
	screen when you're
	finished with this
	section. Shiftboard
	will provide a third
	and final template.
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11) Click the Schedules tab at the top of the screen to go to the last screen of this process.

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Use Shift/Coverage Blocks for this Team		25 05/06/2016	05:00 PM	60	19	100	180
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Expect gaps between some time intervals		27 05/06/2016	07:00 PM	60	13	100	120
		28 05/07/2016	10:00 AM	60	5	100	45
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		34 05/07/2016	03:00 PM	60	16	100	150
		35 05/07/2016	04:00 PM	60	19	100	180

- 12) The last template that you downloaded is Shiftboard's Extended Shift Upload Template filled out with the shifts that the Demand Planner has created based on all of the information that you've provided. Once again you can make edits to this template if you would like, but you don't need to make any changes. In our example we've set the "Auto-Assign" column to "Yes," but most of the options available to you when creating a shift within Shiftboard are available to you in this template as well. Remember to save the file after making any changes.
- 13) Use the Choose File button to upload the Calculated Shift Upload Template from your computer. Now click Validate Shifts and follow the prompts to load the new shifts in to Shiftboard.

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B When making assignments	Universal Template	05/01/2016	05:00 PM	08:00 PM	3	0	Spanish Inbound	2	yes	
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Congratulations! You should now see all of the new shifts on your Calendar.

The Demand Planner has quite a few steps, but most of the time you'll probably be selecting the same options and entering similar data every time you use it. After filling out the first template with your forecasted data most of the remaining steps should be pretty quick, especially if you don't have to make changes to the second or third templates.