

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.

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

The screenshot displays the Shiftboard Calendar interface. At the top, there is a search bar for people and navigation links for 'Who's On?', 'Help/FAQ', 'Feedback', and 'Log Out'. The main header shows 'Calendar' and a status indicator 'Openings = RED / Assigned = GREEN'. Below the header, there are navigation tabs for 'Month', 'Week', 'Day', 'Hour', and 'List', along with a 'People' dropdown and a 'Shift View' dropdown. A 'New' button is circled in red. A 'Add to Schedule' dialog box is open, listing several options: 'Add Shifts - Single or Repeat Positions', 'Use Metrics: Shift/Demand & Planning Tools' (circled in red), 'Bulk Upload - Use a Template', 'Add Shifts - Quick Entry', 'Duplicate/Copy-Forward Existing Schedule', and 'RSVP/Sign-Up Event, Holiday'. A legend on the right side of the dialog box explains that 'Red' indicates 'Available/Open' and 'Green' indicates 'Assigned'. The background shows a calendar grid with various shifts and assignments for different regions and client services.

The image shows two screenshots. The left screenshot is from the Shiftboard 'Data Upload Manager' interface. It features a navigation bar with 'Demand Planning' selected. Below it, there's a section for 'Demand Planning > Staff Optimization'. A red circle highlights the 'Demand Planning Template' link in the 'Available Templates' section. Another red circle highlights the 'Choose File' button in the 'File to Load:' section. The right screenshot is an Excel spreadsheet titled 'Demand Planning Template'. It contains a table with columns: Date, Time, Duration, Mean Service Time, and Volume. The table is highlighted with a red border. The spreadsheet includes a header row with instructions: 'For each time interval, enter Mean Service Time and Volume.' and a data row with values: 8/23/2013, 21:30, 60, 600, 346.

- 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

Demand Planning > Staff Optimization

About demand planning
Your *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 service.

First, complete a [Demand Planning Template](#), set the desired *Service Level* metric, and upload it 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 "Calculate Positions", you'll get a new spreadsheet with your optimal staff quantities that can be uploaded directly into the [Shift Planning Tool](#).

Template Settings

Service Level
Enter one of the following:

- seconds of wait time (average).
- % of tasks wait less than seconds.

Expect gaps between some time intervals

File to Load: Step1-Shiftb...ngUpload.xls

Available Templates

- [Demand Planning Template](#)
- [Shift Planning - Schedule Optimization](#)

[Ad-Hoc Positions Calculator](#)

- 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.
- 11) Click the Schedules tab at the top of the screen to go to the last screen of this process.

The screenshot displays the 'Data Upload Manager' interface for 'Shiftboard Webinar: Call Centers > Data Upload'. The 'Schedules' tab is active, showing the 'Shift Planning Template' settings. The 'Shift Information' section includes:

- Lead Time: None
- Check Existing Schedule: Yes
- Team: Spanish Inbound
- Use Minimum/Maximum Duration:
 - Minimum Shift Duration: 2 hours
 - Maximum Shift Duration: 8 hours
- Use Shift/Coverage Blocks for this Team: (unchecked)
- Expect gaps between some time intervals: (unchecked)

 At the bottom, the 'File to Load' section shows 'Choose File' and 'No file chosen' buttons, with a 'Calculate Shifts' button below.

Overlaid on the right is an Excel spreadsheet titled 'Shift Planning Template'. The spreadsheet has columns for Date, Time, Duration, Positions, Team Service Time, and Volume. A yellow box highlights the 'Positions' column, which contains values ranging from 7 to 19. A red box highlights the 'Calculate Shifts' button in the interface, with a red arrow pointing to the 'Positions' column in the spreadsheet.

Date	Time	Duration	Positions	Team Service Time	Volume
05/05/2016	09:00 AM	:60	7	100	45
05/05/2016	10:00 AM	:60	7	100	50
05/05/2016	11:00 AM	:60	8	100	60
05/05/2016	12:00 PM	:60	9	100	75
05/05/2016	01:00 PM	:60	11	100	90
05/05/2016	02:00 PM	:60	13	100	120
05/05/2016	03:00 PM	:60	16	100	150
05/05/2016	04:00 PM	:60	19	100	180
05/05/2016	05:00 PM	:60	19	100	180
05/05/2016	06:00 PM	:60	16	100	150
05/05/2016	07:00 PM	:60	13	100	120
05/05/2016	09:00 AM	:60	7	100	45
05/05/2016	10:00 AM	:60	7	100	50
05/05/2016	11:00 AM	:60	8	100	60
05/05/2016	12:00 PM	:60	9	100	75
05/05/2016	01:00 PM	:60	11	100	90
05/05/2016	02:00 PM	:60	13	100	120
05/05/2016	03:00 PM	:60	16	100	150
05/05/2016	04:00 PM	:60	19	100	180
05/05/2016	05:00 PM	:60	19	100	180
05/05/2016	06:00 PM	:60	16	100	150
05/05/2016	07:00 PM	:60	13	100	120
05/07/2016	09:00 AM	:60	7	100	45
05/07/2016	10:00 AM	:60	7	100	50
05/07/2016	11:00 AM	:60	8	100	60
05/07/2016	12:00 PM	:60	9	100	75
05/07/2016	01:00 PM	:60	11	100	90
05/07/2016	02:00 PM	:60	13	100	120
05/07/2016	03:00 PM	:60	16	100	150
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.

Calculated Shift Upload Template

Please paste your scheduled shifts into this format. All columns are optional except date and time.

If you do not want to use one of the columns, simply do not enter data into it.

REQUIRED	OPTIONAL - defaults to all day	OPTIONAL - defaults to open ended	OPTIONAL - leave blank if End time is specified or for all day shifts	OPTIONAL - leave blank if End time is specified or for all day shifts	REQUIRED - Enter the EXACT NAME of one of your existing teams	OPTIONAL - Enter the number of people needed to work (defaults to 1)	OPTIONAL - Enter "Yes" to automatically assign available Team Members	OPTIONAL - Enter IDs of available Team Members
8/23/2013	2:00 PM	6:00 PM			Front Desk	Yes		
Date	Start	End	Hours	Minutes	Team	Quantity	Auto-Assign	Assignments
05/01/2016	09:00 AM	05:00 PM	8	0	Spanish Inbound	7	yes	
05/01/2016	11:00 AM	07:00 PM	8	0	Spanish Inbound	1	yes	
05/01/2016	12:00 PM	08:00 PM	8	0	Spanish Inbound	1	yes	
05/01/2016	01:00 PM	08:00 PM	7	0	Spanish Inbound	2	yes	
05/01/2016	02:00 PM	08:00 PM	6	0	Spanish Inbound	2	yes	
05/01/2016	03:00 PM	08:00 PM	5	0	Spanish Inbound	3	yes	
05/01/2016	04:00 PM	08:00 PM	4	0	Spanish Inbound	3	yes	
05/01/2016	05:00 PM	08:00 PM	3	0	Spanish Inbound	2	yes	
05/01/2016	05:00 PM	07:00 PM	2	0	Spanish Inbound	5	yes	
05/02/2016	09:00 AM	05:00 PM	8	0	Spanish Inbound	7	yes	
05/02/2016	11:00 AM	07:00 PM	8	0	Spanish Inbound	1	yes	
05/02/2016	12:00 PM	08:00 PM	8	0	Spanish Inbound	1	yes	
05/02/2016	01:00 PM	08:00 PM	7	0	Spanish Inbound	2	yes	
05/02/2016	02:00 PM	08:00 PM	6	0	Spanish Inbound	2	yes	
05/02/2016	03:00 PM	08:00 PM	5	0	Spanish Inbound	3	yes	
05/02/2016	04:00 PM	08:00 PM	4	0	Spanish Inbound	3	yes	
05/02/2016	05:00 PM	08:00 PM	3	0	Spanish Inbound	2	yes	
05/02/2016	05:00 PM	07:00 PM	2	0	Spanish Inbound	5	yes	
05/03/2016	09:00 AM	05:00 PM	8	0	Spanish Inbound	7	yes	
05/03/2016	11:00 AM	07:00 PM	8	0	Spanish Inbound	1	yes	
05/03/2016	12:00 PM	08:00 PM	8	0	Spanish Inbound	1	yes	
05/03/2016	01:00 PM	08:00 PM	7	0	Spanish Inbound	2	yes	
05/03/2016	02:00 PM	08:00 PM	6	0	Spanish Inbound	2	yes	
05/03/2016	03:00 PM	08:00 PM	5	0	Spanish Inbound	3	yes	

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.