

Capacity Planning SIMPLIFIED

Cinareo 

Workforce Insights

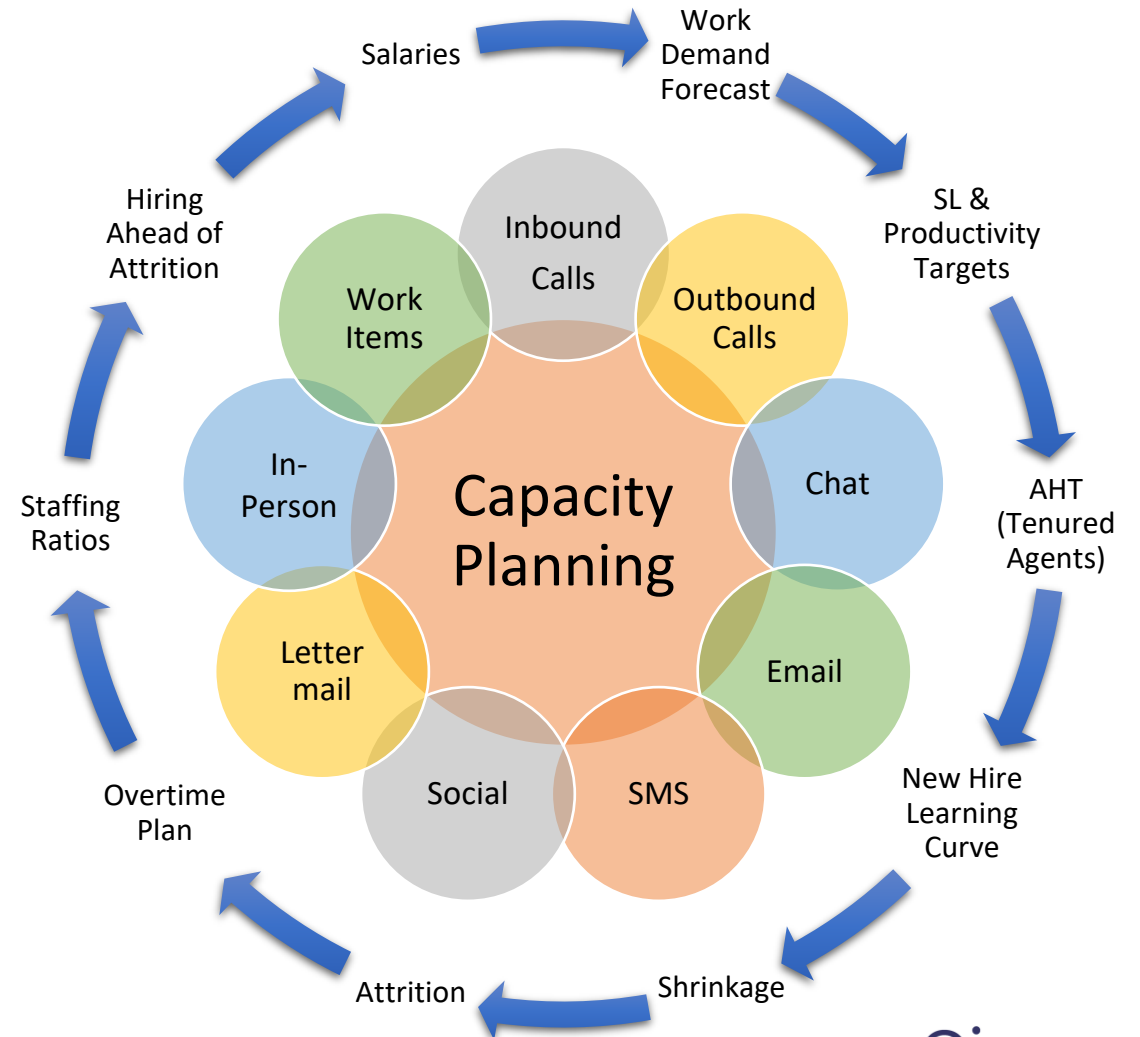
Capacity Planning & Financial Analysis

www.cinareo.com

Capacity planning is hard to do right

There are **multiple variables to consider**, including:

- **forecasting** the volume of front- and back-office work that will arrive at defined times; and
- determining the optimal number of **front-line and support staff** to:
 - meet service level objectives
 - achieve optimal agent productivity
 - maximize customer and employee satisfaction



How do you currently capacity plan?

**I use complex,
Excel spreadsheets**

OR

**I use my existing workforce
management platform**

Using old-school spreadsheets to prepare capacity plans can be:

- Limiting, labor-intensive, and hard to maintain
- Full of incorrect algorithms and errors, resulting in over- or under-staffing or budgeting issues
- Easily prone to human error & challenging to bug-fix
- Puzzling to build for omni-channel interactions
- Difficult to update for new programs

WFM applications on the market often yield incorrect results, including :

- Missed or misapplied data inputs resulting in inaccurate staffing levels and financial projections
- Challenges differentiating between non-deferrable interactions (e.g., calls) and deferrable (i.e. email)
- Exclusion of all or some shrinkage factors
- Use of “industry-standards” where few (or none) exist
- No capacity planning or budgeting for support staff

Both options are challenging to scale for new business opportunities and challenges.

Cinareo: an innovative SaaS application

YEAR	=+'Input Sheet'!D17	=+'Input Sheet'!E17	=+'Input Sheet'!F17
=+'Input Sheet'!C18	=+IF('Input Sheet'!D18>0,'Input Sheet'!D17)	=+IF('Input Sheet'!E18>0,'Input Sheet'!E17)	=+IF('Input Sheet'!F18>0,'Input Sheet'!F17)
Average Handle Time (AHT)	=+IF('Input Sheet'!\$E225=1,(AVERAGE('Input Sheet'!D19:D224)))	=+IF('Input Sheet'!\$E225=1,(AVERAGE('Input Sheet'!E19:E224)))	=+IF('Input Sheet'!\$E225=1,(AVERAGE('Input Sheet'!F19:F224)))
Shrinkage Factor	=IF('Input Sheet'!\$D\$225=1,'Input Sheet'!D9)	=IF('Input Sheet'!\$D\$225=1,'Input Sheet'!E9)	=IF('Input Sheet'!\$D\$225=1,'Input Sheet'!F9)
Number of working days per month	=+E55	=+F55	=+G55
Productive Agents per Week	=+E16*E13/E53	=+F16*F13/F53	=+G16*G13/G53
Paid Agents per Week	=IF(E10="",0,ROUNDUP(E14/(1-E12),0))	=IF(F10="",0,ROUNDUP(F14/(1-F12),0))	=IF(G10="",0,ROUNDUP(G14/(1-G12),0))
Productive Agents per day	=IF(E10="",0,AgentsReq(E21,\$J\$5,E11,\$B\$5))	=IF(F10="",0,AgentsReq(F21,\$J\$5,E11,\$B\$5))	=IF(G10="",0,AgentsReq(G21,\$J\$5,G11,\$B\$5))
Paid Agents per day	=IF(E10="",0,ROUNDUP(E16/(1-E12),0))	=IF(F10="",0,ROUNDUP(F16/(1-F12),0))	=IF(G10="",0,ROUNDUP(G16/(1-G12),0))
Forecasted Service Level	=IF(E10="",0,1-E24*EXP(-(E16-E23)*\$C\$1))	=IF(F10="",0,1-F24*EXP(-(F16-F23)*\$C\$1))	=IF(G10="",0,1-G24*EXP(-(G16-G23)*\$C\$1))
Average Speed of Answer (seconds)	=IF(E10="",0,E24*E11/(E16*(1-E20)))	=IF(F10="",0,F24*F11/(F16*(1-F20)))	=IF(G10="",0,G24*G11/(G16*(1-G20)))
Forecasted Occupancy	=IF(E10="",0,E23/E16)	=IF(F10="",0,F23/F16)	=IF(G10="",0,G23/G16)
Calls per interval	=IF(E10="",0,(E10/E13/\$J\$4)*\$J\$5/60)	=IF(F10="",0,(F10/F13/\$J\$4)*\$J\$5/60)	=IF(G10="",0,(G10/G13/\$J\$4)*\$J\$5/60)
Average incoming calls (Per second) [y]	=IF(E10="",0,E21/(\$J\$5*60))	=IF(F10="",0,F21/(\$J\$5*60))	=IF(G10="",0,G21/(\$J\$5*60))
Traffic intensity [u]	=IF(E10="",0,E22*E11)	=IF(F10="",0,F22*F11)	=IF(G10="",0,G22*G11)
Probability of waiting (POISSON LAW)	=IF(E10="",0,POISSON.DIST(E16,E23,FALSE))	=IF(F10="",0,POISSON.DIST(F16,F23,FALSE))	=IF(G10="",0,POISSON.DIST(G16,G23,FALSE))

Productive Agents per Week	=+E28*E13/E53	=+F28*F13/F53	=+G28*G13/G53
Paid Agents per Week	=IF(E10="",0,ROUNDUP(E26/(1-E12),0))	=IF(F10="",0,ROUNDUP(F26/(1-F12),0))	=IF(G10="",0,ROUNDUP(G26/(1-G12),0))
Productive Agents per day	=IF(E10="",0,AgentsReq(E33,\$J\$5,E11,\$B\$5))	=IF(F10="",0,AgentsReq(F33,\$J\$5,E11,\$B\$5))	=IF(G10="",0,AgentsReq(G33,\$J\$5,G11,\$B\$5))
Paid Agents per day	=IF(E10="",0,ROUNDUP(E28/(1-E12),0))	=IF(F10="",0,ROUNDUP(F28/(1-F12),0))	=IF(G10="",0,ROUNDUP(G28/(1-G12),0))
Forecasted Service Level	=IF(E10="",0,1-E36*EXP(-(E28-E35)*\$C\$2))	=IF(F10="",0,1-F36*EXP(-(F28-F35)*\$C\$2))	=IF(G10="",0,1-G36*EXP(-(G28-G35)*\$C\$2))
Average Speed of Answer (seconds)	=IF(E10="",0,E36*E11/(E28*(1-E32)))	=IF(F10="",0,F36*F11/(F28*(1-F32)))	=IF(G10="",0,G36*G11/(G28*(1-G32)))
Forecasted Occupancy	=IF(E10="",0,E35/E28)	=IF(F10="",0,F35/F28)	=IF(G10="",0,G35/G28)
Calls per interval	=IF(E10="",0,(E10/E13/\$J\$4)*\$J\$5/60)	=IF(F10="",0,(F10/F13/\$J\$4)*\$J\$5/60)	=IF(G10="",0,(G10/G13/\$J\$4)*\$J\$5/60)
Average incoming calls (Per second) [y]	=IF(E10="",0,E33/(\$J\$5*60))	=IF(F10="",0,F33/(\$J\$5*60))	=IF(G10="",0,G33/(\$J\$5*60))
Traffic intensity [u]	=IF(E10="",0,E34*E11)	=IF(F10="",0,F34*F11)	=IF(G10="",0,G34*G11)
Probability of waiting (POISSON LAW)	=IF(E10="",0,POISSON.DIST(E28,E35,FALSE))	=IF(F10="",0,POISSON.DIST(F28,F35,FALSE))	=IF(G10="",0,POISSON.DIST(G28,G35,FALSE))

Productive Agents per Week	=+E40*E13/E53	=+F40*F13/F53	=+G40*G13/G53
Paid Agents per Week	=IF(E10="",0,ROUNDUP(E38/(1-E12),0))	=IF(F10="",0,ROUNDUP(F38/(1-F12),0))	=IF(G10="",0,ROUNDUP(G38/(1-G12),0))
Productive Agents per day	=IF(E10="",0,AgentsReq(E45,\$J\$5,E11,\$B\$5))	=IF(F10="",0,AgentsReq(F45,\$J\$5,E11,\$B\$5))	=IF(G10="",0,AgentsReq(G45,\$J\$5,G11,\$B\$5))
Paid Agents per day	=IF(E10="",0,ROUNDUP(E40/(1-E12),0))	=IF(F10="",0,ROUNDUP(F40/(1-F12),0))	=IF(G10="",0,ROUNDUP(G40/(1-G12),0))
Forecasted Service Level	=IF(E10="",0,1-E48*EXP(-(E40-E47)*\$C\$3))	=IF(F10="",0,1-F48*EXP(-(F40-F47)*\$C\$3))	=IF(G10="",0,1-G48*EXP(-(G40-G47)*\$C\$3))
Average Speed of Answer (seconds)	=IF(E10="",0,E48*E11/(E40*(1-E44)))	=IF(F10="",0,F48*F11/(F40*(1-F44)))	=IF(G10="",0,G48*G11/(G40*(1-G44)))
Forecasted Occupancy	=IF(E10="",0,E47/E40)	=IF(F10="",0,F47/F40)	=IF(G10="",0,G47/G40)
Calls per interval	=IF(E10="",0,(E10/E13/\$J\$4)*\$J\$5/60)	=IF(F10="",0,(F10/F13/\$J\$4)*\$J\$5/60)	=IF(G10="",0,(G10/G13/\$J\$4)*\$J\$5/60)
Average incoming calls (Per second) [y]	=IF(E10="",0,E45/(\$J\$5*60))	=IF(F10="",0,F45/(\$J\$5*60))	=IF(G10="",0,G45/(\$J\$5*60))
Traffic intensity [u]	=IF(E10="",0,E46*E11)	=IF(F10="",0,F46*F11)	=IF(G10="",0,G46*G11)
Probability of waiting (POISSON LAW)	=IF(E10="",0,POISSON.DIST(E40,E47,FALSE))	=IF(F10="",0,POISSON.DIST(F40,F47,FALSE))	=IF(G10="",0,POISSON.DIST(G40,G47,FALSE))



Cinareo Capacity Planning & Financial Analysis
Logout

[Exit plan](#)

1

2

3

4

5

6

7

8

9

Queue
Work Volume
Handle Time
Learning Curve
Shrinkage
Attrition
Working Days
Support Staff
Review

Step 1 of 9: Create Queue(s)

Create and save each queue in order to create your forecast. Once you save all your queues, select the NEXT button to go to the next step to input your variables.

Enter queue details

Business area *

Work type * **Work time constraint ***

Inbound calls

Non-deferrable work

SAVE QUEUE

List of Queues

You have 3 saved queues

Customer Service: Inbound Calls

Customer Service: Email

Back Office: Work Items

NEXT

Ditch the complex spreadsheets and inadequate forecasting applications that miss so many variables...

...and start using an online wizard with the complex formulas built in, wrapped in a simple, intuitive interface that even a novice can use.

How Cinareo works

1

Build a forecast & capacity plan

Use our simple step-by-step wizard to build a financial forecast and capacity plan

2

Compare different scenarios

Easily create different scenarios and see the impact on your staff and budget

3

Make informed decisions

Implement the most cost-effective and efficient options for your business to ensure success

Cinareo provides workforce insights that **complement** any WFM platform, including:

Long-range planning

Provides multi-skilled contact centres and back-office operations with up to 3 years of advance planning

Detailed budgets

Create budgets that include both agent and support staff costs, overtime, and hiring ahead of attrition.

Different scenarios

Enables assessment of benefits and impact on capacity, staff, and budget to help make decisions.

KPI insights

Provides insights into the key performance indicators that matter most to operations and finance management.

Recruitment and training

Allows you to plan for how many to hire and when, for what queue or skill and the number of trainers needed.

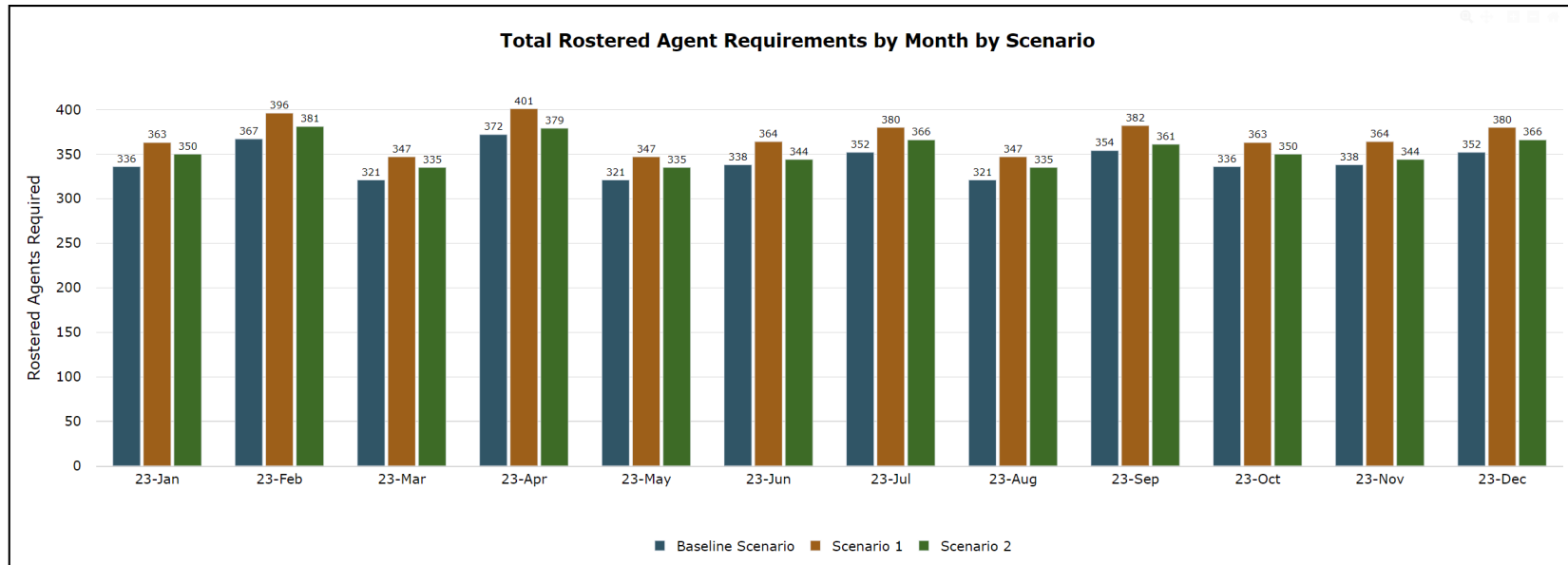
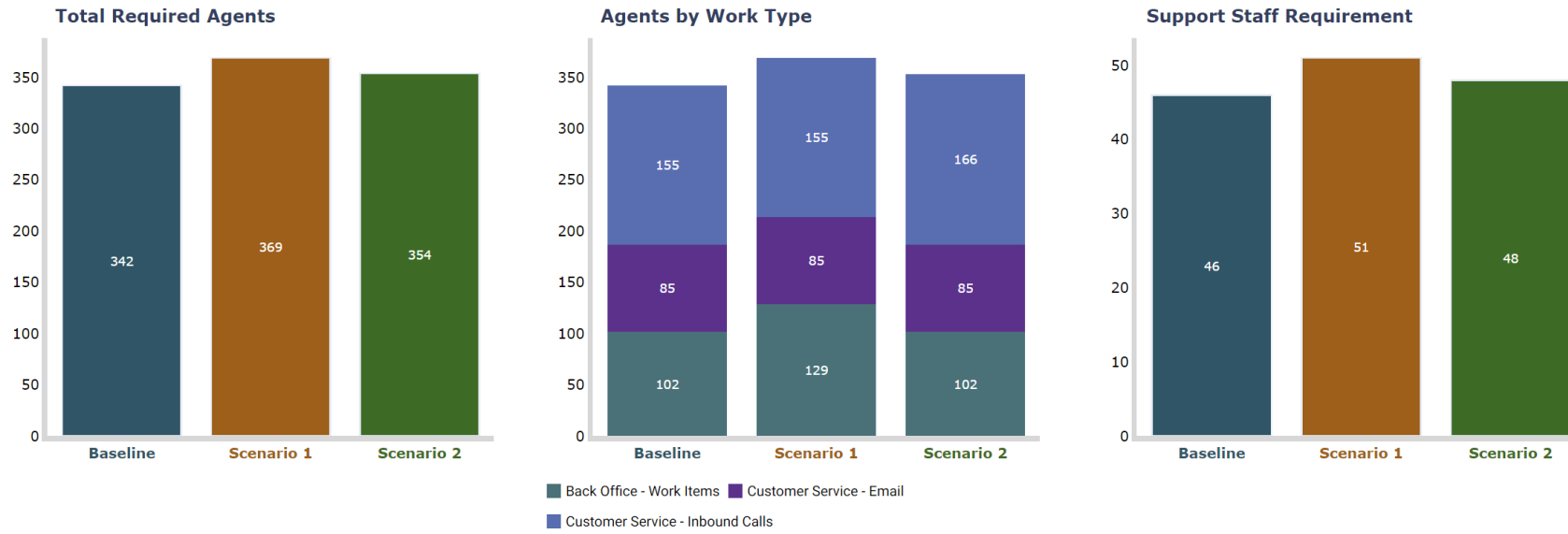
Cinareo is an innovative, SaaS application that guides you step-by-step to create optimal capacity plans and financial forecasts.

Build a Baseline forecast and create different scenarios quickly & easily

- Modify any data points to analyze the impact on your staffing & your budget in a multi-year period
- Drill down and view a monthly or daily forecast and review the detailed requirements on a queue-by-queue basis
- View differences between scenarios as absolute values or percentages

Service Level / Productivity	Baseline Scenario		Scenario 1		Scenario 2	
Back Office - Work Items						
Productivity	90 %		95 %		90 %	
Customer Service - Email						
Productivity	90 %		90 %		90 %	
Customer Service - Inbound Calls						
Service Target	80 %	20 sec	80 %	20 sec	80 %	120 sec
Forecast	83.93%	20 sec	83.93%	20 sec	81.94%	120 sec
Occupancy	87.89%		87.89%		93.68%	
Agent Requirements	# of agents		# of agents		# of agents	
Back Office - Work Items	102		129 +27		102	
Customer Service - Email	85		85		85	
Customer Service - Inbound Calls	155		155		166 +11	
Total Required Agents (Paid)	342		369 +27		354 +12	
Effective Required Agents	291		314 +23		283 -8	
Difference (Learning curve cost)	51		55		71	
Effective Capacity Rate	85.09%		85.09%		79.94%	
Support Staff	# of staff		# of staff		# of staff	
Quality Assurance	4		5 +1		4	
Supervisors	23		25 +2		24 +1	
Trainers	9		10 +1		10 +1	
WFM Analyst	4		5 +1		4	
Operations Manager	4		4		4	
Director	2		2		2	
Staff Budget	Cost		Cost		Cost	
Agent	\$17,118,422		\$18,466,460		\$17,690,105	
Quality Assurance	\$297,712		\$321,156		\$307,654	
Supervisors	\$1,483,597		\$1,600,427		\$1,533,143	
Trainers	\$586,917		\$633,136		\$606,517	
WFM Analyst	\$296,719		\$320,085		\$306,628	
Operations Manager	\$291,013		\$313,930		\$300,731	
Director	\$256,776		\$276,997		\$265,352	
Agent Salaries	\$17,118,422		\$18,466,460		\$17,690,105	
Support Staff Salaries	\$3,212,734		\$3,465,731		\$3,320,025	
Hiring Ahead of Attrition Costs	\$1,395,952		\$1,633,206		\$2,117,022	
Overtime Costs (Agents Only)	\$342,369		\$369,330		\$353,802	
Total Budget (Agents / Support Staff)	\$22,069,477		\$23,934,727		\$23,480,954	
Cost per Work Type	Cost		Cost		Cost	
Back Office - Work Items	\$21.99		\$28.20		\$21.99	
Customer Service - Email	\$8.95		\$8.95		\$8.95	
Customer Service - Inbound Calls	\$8.42		\$8.42		\$9.60	

Access graphical summaries for all your different scenarios



- View annual or monthly data visually, and zoom or scroll through charts individually
- Easily export or print the information you need as data or graphics for reports or presentations

View daily forecasts for each queue for any scenario

- View your forecast based on work arrival patterns down to 15, 30 or 60 minute intervals
- Review the adjusted results based on any forecasted headcount reduction
- Get a monthly summary report of both the optimized and adjusted data

Scenario *	Baseline
Queue *	Customer Service - Inbound
Forecast month *	January 2023
Headcount reduction *	0 %
UPDATE	

Summary	Optimized (Baseline)	Adjusted
Forecasted Demand	100,000	100,000
Weighted AHT	470	470
Target SL	80.0%	80.0%
Forecasted SL	80.9%	80.9%
ASA (sec)	24	24
Occupancy	79.8%	79.8%
Shrinkage	34.5%	34.5%
Total Workload Hours	13,056	13,056
Production Hours	16,368	16,368
Productive FTE	99	99
Required/Paid FTE	151	151

JANUARY 2023									
MONDAY									
	Work Volume	Staff Required		Occupancy		ASA		Service Level	
		Model	Adjusted	Model	Adjusted	Model	Adjusted	Model	Adjusted
12:00AM	67	22	22	80	80	24	24	81	81
12:30AM	67	22	22	80	80	24	24	81	81
1:00AM	67	22	22	80	80	24	24	81	81
1:30AM	67	22	22	80	80	24	24	81	81
2:00AM	67	22	22	80	80	24	24	81	81
2:30AM	67	22	22	80	80	24	24	81	81
3:00AM	67	22	22	80	80	24	24	81	81
3:30AM	67	22	22	80	80	24	24	81	81
TOTAL	3,226	1,056	1,056	80	80	24	24	81	81
STAFF HOURS	2,106	2,640	2,640						

Cinareo provides you with answers



Inflation squeezing your budget?

Cinareo will quickly determine ways you can avoid layoffs, maintain your service levels and absorb the budget cut to still maintain customer satisfaction



Need to increase customer retention?

Cinareo will optimize the number of agents and support staff needed to meet your customer demand and provide options to keep within your budget



Want to reduce agent turnover?

Cinareo will help you improve productivity and boost agent performance to reduce turnover and tell you the costs of hiring ahead of attrition

Answer these questions – and many more – with Cinareo

Cinareo is a powerful tool that guides executive decision-making in order to:



- ✓ Optimize staffing costs
- ✓ Increase service levels
- ✓ Improve productivity
- ✓ Reduce risk

**...and ultimately improve
customer satisfaction and retention**

What are you waiting for?

Cinareo 

Workforce Insights

Capacity Planning & Financial Analysis

www.cinareo.com