# Cinareo

Workforce Management Omni-channel Capacity Planning & Financial Analysis

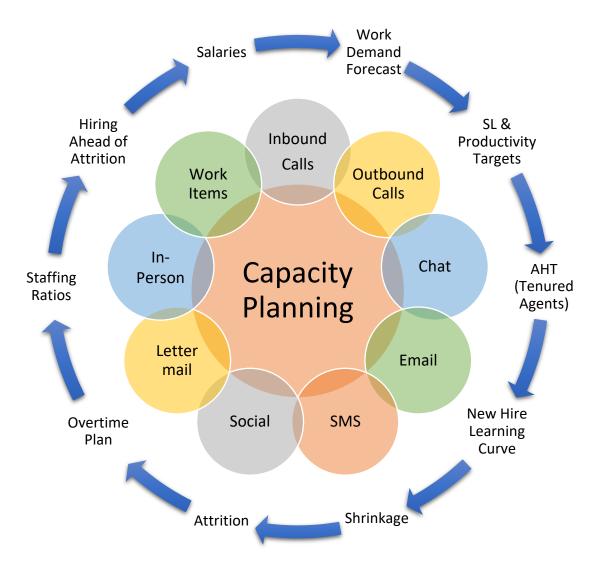
**Redefining Capacity Planning** 



# What is capacity planning?

Capacity planning involves forecasting the volume of front- and back-office work that will arrive at defined times; and then determining the number of front-line and support staff that are required to:

- meet service level objectives
- achieve optimal agent productivity
- maximize customer and employee satisfaction.



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# **Old-school capacity planning**

Old-school Excel spreadsheets and home-grown capacity planning solutions are incredibly limiting, timeconsuming, hard to maintain, and challenging to scale for new business opportunities and challenges.

#### Using spreadsheets to prepare capacity plans:

- Requires custom development
- Is labor intensive, taking weeks to months
- May or may not be using appropriate algorithms
- Can be prone to human error and challenging to bug-fix
- Puzzling to build for omni-channel interactions or multiple queues within the same channel
- Often difficult to update for new programs
- Frequently results in errors such as over- or under-staffing and budgeting depending on methodology



# Why was Cinareo created?

Even the leading WFM applications on the market often yield erroneous results as they miss or misapply data inputs resulting in inaccurate staffing levels and financial projections.



Challenged to differentiate between non-deferrable interactions (e.g., calls, chats) and deferrable work types (email, letters, back office)



Use Agent proficiency factors as a load rather than using a weighted AHT consisting of tenured agent AHT, learning curve, and attrition rates to align with the monthly plan.



Exclude some or all shrinkage factors (e.g., paid or unpaid leave and non-productive time)



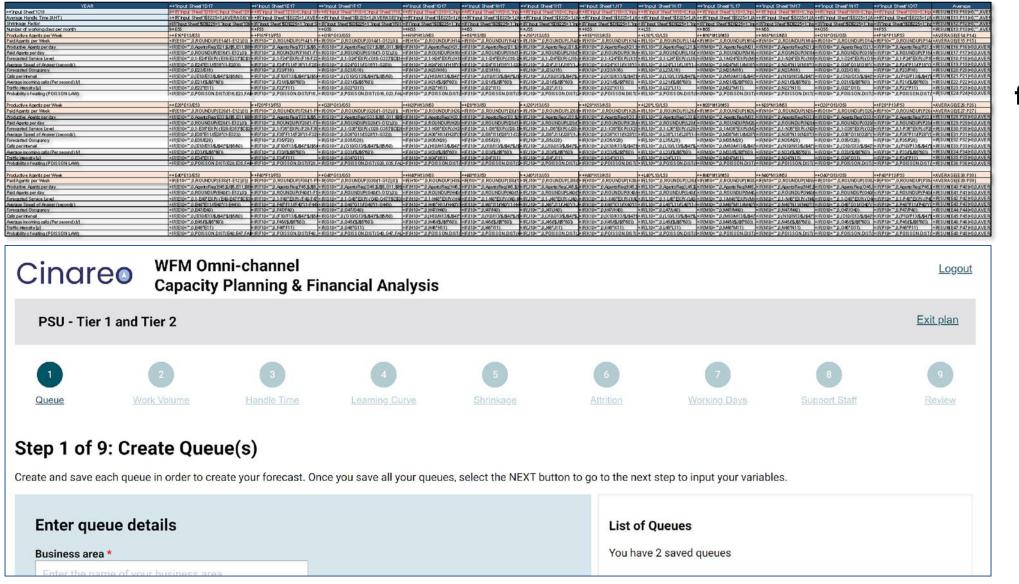
Using 'industry standards' where few exist or little to no consideration for capacity planning of support staff and budget (e.g., Supervisors, WFM, QA, Trainers, internal help desks)



Missing Key performance indicator (KPI) targets such as cost per contact/work item.



### The evolution of capacity planning



Complex, formula-driven spreadsheets



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### **The Solution**

Cinareo is an innovative SaaS application that closes the gaps in capacity planning, financial analysis and scenario modelling.

#### **Reduce staffing challenges**

Cinareo handles both front- and back-office operational planning, allowing you to compare scenarios to determine the ideal resource model.

#### Improve productivity & boost performance

Cinareo will save you money and reduce risk to ALL of your front- and back-office operations and cost-effectively manage the customer experience.

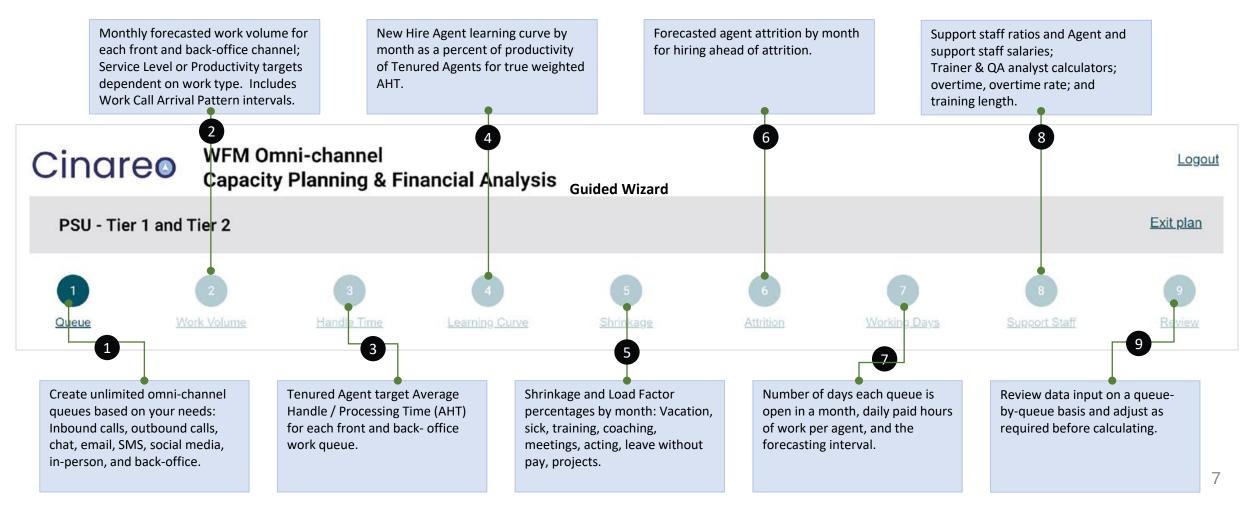
#### **Ensure you have the right number of agents**

Cinareo will easily calculate staffing requirements, budget & forecasting for who to hire and when.



# Simple and effective wizard

Take the guess work out of capacity planning with a simple and understandable wizard-based tool for WFM professionals and novices that executes practical, real-world repeatable results that can be built in about the same time as a coffee break.



#### EXAMPLE 1

How simple is it to determine the right number of agents for my omni-channel contact centre to meet service level objectives or productivity targets?

#### Data inputs complete

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Calculate

Service Level / Productivity		Baseline Scenario		
Deferrable				
Non-deferrable				
Customer Service - Inbound Calls				
Service Target	80 %	20 sec		
Forecast	81.23%	20 sec		
Occupancy	90.3	7%		
Agent Requirements	# of a	gents		
Deferrable				
Non-deferrable				
Customer Service - Inbound Calls	13	33		
Total Required Agents (Paid)	13	33		
Effective Required Agents	11	5		
Difference (Learning curve cost)	1	8		
Effective Capacity Rate	86.7	'3%		
Support Staff	# of :	staff		
Quality Assurance				
Supervisors	2	,		
Trainers	3	3		
WFM	2	2		
Operations Manager	1			
Staff Budget	Ca	st		
Agent	\$7,97	0,000		
Quality Assurance	\$309	,944		
Supervisors	\$752	,722		
Trainers	\$206	,630		
WFM	\$154	,972		
Operations Manager	\$132	,833		
Agent Salaries	\$7,97	0,000		
Support Staff Salaries	\$1,55	7,101		
Hiring Ahead of Attrition Costs	\$558	,700		
Overtime Costs (Agents Only)	\$159	,400		
Total Budget (Agents / Support Staff)	\$10,24	15,201		
Cost per Work Type	Co	st		
Customer Service - Inbound Calls	\$8.	54		

How many agents do I need and for which queues?

If all my agents were experienced, how many would I need?

What are the roles I need to support my agents and how many do I need?

What will it cost me to run my operation?

Agent costs

• Support staff costs

Hiring ahead of attrition

Overtime costs

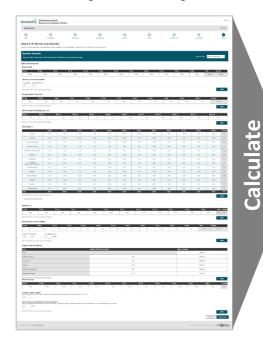
What is my average cost per call based on forecasted inputs?



#### EXAMPLE 2

#### How much does it cost to be 1% wrong?

#### Data inputs complete



Letter Letter Letter Letter   Defermation Import Service - Housed Calls Import Service - House Calls Import Service - H	Service Level / Productivity	Baseline Scenario		Sce	enario 1				
Non-differential   Second Target   20 sec   0.0   20 sec   scenario that asks     Service Target   Porceast   20 sec   82 20%   20 sec   20 sec <t< th=""><th></th><th></th><th></th><th><u>Edit</u></th><th>Delete</th><th></th><th></th></t<>				<u>Edit</u>	Delete				
Cutomer Servera - Inboard Calls   Image: Constant of the constant	Deferrable						Simply run a 'what if'		
Cluster Service Target   80 %   20 sec   00   20     Poresst   81 23%   20 sec   82 20%   20 sec     Occupancy   91 23%   20 sec   82 85%     Agent Requirements   # of agents   # of agents   B 85%     Deferrate   # of agents   # of agents   B 85%     Non-iderrate/B   133   126   Enchor Required Agents (Paid)   133   126     Deferrate/B   115   111   111 <td< td=""><td>Non-deferrable</td><td></td><td></td><td></td><td></td><td></td><td>scenario that asks</td></td<>	Non-deferrable						scenario that asks		
Forecast   20 sec   92.2%   20 sec   92.2%   20 sec     Decogatory   90.37%   80.45%   80.45%   Using the same     Defenable   # of agents   # of agents   # of agents   Using the same     Non-defenable   133   126   # of agents   Edentable   Edentable   Edentable   Edentable   Edentable   # of agents   Edentable   Edentable   Edentable   Edentable   Edentable   # of agents   Edentable   Edentable   Edentable   Edentable   Edentable   Edentable   # of agents   Edentable   Earning Carve, shrinkage factors, attrition rates, etc by a mere 1%, what   Edentable   Edentable   Edentable   Edentable   Edentable   Edentable   Edentable   Edentable   Edentable   Ede	Customer Service - Inbound Calls								
Occupancy90.37%88.86%Agent Requirementsof agentsof agentsNon-deferrable1010Customer Sarvice - Intourd Calls133126Customer Sarvice - Intourd Calls133126Effective Required Agents (Paid)133126Effective Required Agents115111Ofference (Learning curve cost)11615Effective Required Agents44Support Staff# of staffOutlarly Assurance98Trainers98Trainers2.22VirM2.22Could Information57.970,00057.483.500Guilely Assurance53206,6305188,750Supervisors95126,555Trainers57.27225966,1125Trainers52206,6305188,750VirM5126,7225966Operations Manager513,263Agent Staffs57.4770,000Supervisors513,657,101Trainers5126,251Supervisors514,672Operations Manager513,657,101Agent Staffs57.4770,000Supervisors514,672Operations Kanager513,657,101Agent Staffs57.487,000Supervisors514,672Operations Kanager513,657,101Agent Staffs57.487,000Supervisors514,672Overtime Casts (Agents Only)519,82,00Staffs Overtime Casts510,262,01 <tr< td=""><td>Service Target</td><td>80 %</td><td>20 sec</td><td>80</td><td>20</td><td></td><td>Ĭ</td></tr<>	Service Target	80 %	20 sec	80	20		Ĭ		
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Quality Assurance     \$309,944     \$281,565       Supervisors     \$752,722     \$664,125       Trainers     \$206,630     \$189,750       WFM     \$154,972     \$143,090       Operations Manager     \$132,833     \$123,995       Agent Salaries     \$7,970,000     \$7,463,500       Support Staff Salaries     \$1,557,101     \$1,402,525       Hiring Ahead of Attrition Costs     \$5658,700     \$444,078       Overtime Costs (Agents Only)     \$159,400     \$74,635       Total Budget (Agents / Support Staff)     \$10,245,201     \$9,384,738       Cost per Work Type     Cost     Cost									
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	Customer Service - Inbound Calls								

#### **EXAMPLE 3** I need to give my staff a raise, but I don't have the budget.

**Goal:** Raise agent and support staff salaries by 5% without increasing operating budget

**What if:** I decrease Average Handle Time (AHT) by 5%?

Increasing salary costs by 5% requires over \$497K in additional operating expense. (See Scenario 1)

By reducing AHT by 5% across all queues, lowers the number of required FTE from 153 to 145, a savings of 8 FTE, support staff requirements by 2 FTE, resulting in no increase in operating budget (See Scenario 2).

Service Level / Productivity	Baseline Scenario			nario I	Scenario 2		
			Edit	Delete	Edit Del		
Deferrable							
Billing Back Office - Work Items							
Productivity	85	%	8	5	85	5	
Customer Service - Email				-			
Productivity	79	%	7	9	79	•	
Non-deferrable							
Customer Service - Inbound Calls							
Service Target	90 %	10 sec	90	10	90 10		
Forecast	91.84%	10 sec	91.84%	10 sec	91.18%	10 sec	
Occupancy	82.3	32%	82.3	32%	82.3	6%	
Sales - Inbound Calls							
Service Target	90 %	10 sec	90	10	90	10	
Forecast	91.75%	10 sec	91.75%	10 sec	91.42%	10 sec	
Occupancy	73.8	73.87%		37%	73.72%		
Agent Requirements	# of a	gents	# of a	gents	# of ag	ients	
Deferrable		<u> </u>					
Billing Back Office - Work Items	1	14		14		14	
Customer Service - Email		17		17		15	
Non-deferrable							
Customer Service - Inbound Calls	8	3	8	3	79	2	
Sales - Inbound Calls				39		37	
Total Required Agents (Paid)		153		153		145	
Effective Required Agents		135		135		129	
Reference (Learning curve cost)	1			8	12		
Effective Capacity Rate		34%	88.34%		88.3		
Support Stat	# of		# of		# of s		
Quality Assurance					3		
Supervisors	1	1	1	1	9	, ,	
Trainers		3	3		3		
Workforce Management		3	3		3		
Operations Manager		1		1			
Staff Budget	Co			ost	Co		
Agent	\$7,66		\$8,05		\$7,63		
Quality Assurance		\$200,810		\$210,850		\$200,086	
Supervisors		\$766,857		\$805,199		\$763,718	
Trainers		\$170,395		\$178,914		\$169,545	
Workforce Management		\$204,496		\$214,720		\$203,658	
Operations Manager		\$115,028		\$214,720		\$114,558	
Agent Salaries		\$7,668,563		\$8,051,991		\$7,637,183	
Support Staff Salaries		\$1,457,586		\$1,530,463		\$1,451,565	
Hiring Ahead of Attrition Costs	\$669		\$702		\$668		
Overtime Costs (Agents Only)	\$153		\$161		\$152		
Total Budget (Agents / Support Staff)	\$9,94	,	\$10,44	,	\$9,910		
Cost per Work Type		ost		st	Co		
Billing Back Office - Work Items	\$9				\$9.0		
Customer Service - Email				\$10.15 \$3.72			
Customer Service - Email Customer Service - Inbound Calls		\$3.54 \$5.59		\$3.72		\$3.34 \$5.58	
Sales - Inbound Calls		\$5.59		\$5.87		\$5.58	

#### **EXAMPLE 4** I need to give my staff a raise, but I don't have the budget.

**Goal:** Raise agent and support staff salaries by 5% without increasing operating budget

What if: I decrease forecasted overtime, decrease new hire learning curve, and lower annual attrition and by how much?

Increasing salary costs by 5% requires over \$497K in additional operating expense. (See Scenario 1)

By reducing forecasted overtime from 2% to 1% per month, expediting agent new hire learning curve by 1 month, and reducing annual attrition lowers the number of required FTE from 153 to 149, a savings of 4 FTE, reduces support staff requirements by 2 FTE, lowers hiring ahead of attrition costs by almost \$100K, and overtime costs by almost \$80K resulting in no increase in operating budget (See scenario 2).

Service Level / Productivity		eline ario		nario 1	Scenario 2		
			Edit	<u>Delete</u>	Edit	۵	
Deferrable							
Billing Back Office - Work Items							
Productivity	85	%		85	85		
Customer Service - Email							
Productivity	79	%		79	79		
Non-deferrable							
Customer Service - Inbound Calls							
Service Target	90 %	10 sec	90	10	90	10	
Forecast	91.84%	10 sec	91.84%	10 sec	91.04%	10 sec	
Occupancy	82.3	2%	82	32%	82.55	%	
Sales - Inbound Calls							
Service Target	90 %	10 sec	90	10	90	10	
Forecast	91.75%	10 sec	91.75%	10 sec	91.52%	10 sec	
Occupancy	73.8	7%	73.87%		73.63%		
Agent Requirements	# of a	gents	# of :	agents	# of ag	ents	
Deferrable							
Billing Back Office - Work Items	1	4		14	14		
Customer Service - Email	1	17		17		17	
Non-deferrable							
Customer Service - Inbound Calls	83		83		80		
Sales - Inbound Calls	3	30		30		37	
Total Required Agents (Paid)	1	i3	1	53	149		
Effective Required Agents	1:	15	1	35	135	;	
Difference (Learning curve cost)		B		18	14		
Effective Capacity Rate		4%	88.34%		90.90	%	
Support Staff	# of	staff	# of	staff	# of st	taff	
Quality Assurance		1		3	3		
Supervisors	1	1		11	9		
Trainers		,	3		3		
Workforce Management	:	4	3		3		
Operations Manager				1	1		
Staff Budget	Ca	st	С	ost	Cos	t	
Agent		8,563	\$8,0	51,991	\$7,820,816		
Quality Assurance		\$200,810		\$210,850		\$205,052	
Bupervisors		\$766,857		\$805,199		\$782,082	
Trainers		\$170,395		\$178,914		\$173,813	
Workforce Management	\$204	,496	\$21	4,720	\$208,5	555	
Operations Manager	\$115	,028	\$12	0,780	\$117,3	312	
Agent Salaries	\$7,66	8,563	\$8,0	51,991	\$7,820,	816	
Support Staff Salaries	\$1,45	7,586	\$1,5	30,463	\$1,486	814	
Hiring Ahead of Attrition Costs	\$669	,489	\$70	2,963	\$575,1	198	
Overtime Costs (Agents Only)	\$153	,371	\$16	1,040	\$78,2	08	
Total Budget (Agents / Support Staff)	\$9,94	9,009	\$10,4	46,457	\$9,961	036	
Cost per Work Type	Co	st	С	ost	Cos	t	
Billing Back Office - Work Items	\$9	67	\$1	0.15	\$9.9	8	
Customer Service - Email		\$3.54		\$3.72		\$3.67	
Customer Service - Inbound Calls	\$5	59	St	5.87	\$5.5	7	
Sales - Inbound Calls		\$7.11		\$7.47		\$6.99	

### **Other features and functionalities:**

#### New Hire Recruitment & Training Planner

**Solution:** A model that forecasts attrition and growth up to a year in advance by queue/skill. The model estimates how many people are likely to leave, the average rate of graduation to production, when recruits need to start training, and the salaries for new hires while in training.

#### Multi-year forecasting

**Solution:** A model that allows for users to build a 12-month forecasting plan or create a longer range forecast up to 3 years.

#### Work volume intervals

**Solution:** A model that allows to determine work volume down to the 60, 30 or 15 minute interval for each day of the week, along with exceptions to months that might have different/seasonal operating times or volumes.

Coming March 2023

Cinareo

## Unlimited 'what if' scenarios...



How many agents and support staff (e.g., supervisors, trainers, QA, workforce analysts) do I need if I change my service level or productivity targets?



What service level will I achieve with my current headcount?



What is the total agent and support staff budget I need, and what is the cost per interaction by channel?



What is the cost of adding a new service channel or scaling up my business?



What is the benefit from reducing attrition or improving the new hire agent learning curve?



- How many agents do I need to hire and when in order to hire ahead of forecasted attrition?
- **OO** ...and much more



### **Questions?**

# Cinareo

Workforce Management Omni-channel Capacity Planning & Financial Analysis

**Redefining Capacity Planning** 

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