

## cloudcords™ SCHEDULER

### Customer Success Story

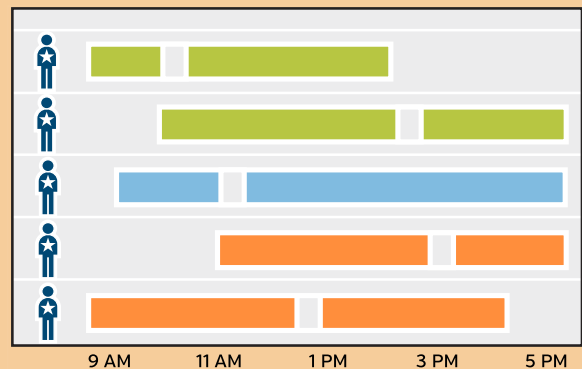
One of the largest UK retail banks was in the early stage of transforming more than 1,200 branches to improve banking services for its customers. The bank made significant investments in branch technology to empower customers with self-service options for routine transactions. The bank also made a strong commitment to transforming its workforce so they could better serve customers with complex service needs and financial advice.

Because of a merger of different brands, the bank did not have a single, common labor scheduling software solution. The existing software tools were too difficult to use for branch managers and were too complicated to access weekly schedules and request time-off for branch staff.

***Regional managers could not get an accurate view of what was happening on the ground with their workforce.***

Furthermore, the existing software tools and environment became too cumbersome and expensive for the IT organization to maintain.

Upon evaluation of various scheduling software options, the bank chose Kiran Analytics as its workforce optimization partner to implement the [Scheduler](#) software.



### Scheduling Solution Requirements:

- Easy-to-use for branch managers
- Robust, optimized scheduling
- Accessibility of schedules to staff
- Secure, high performance SaaS
- Local solution delivery and support
- Compatibility with mobile and desktop environments



## Key Challenges

- Due to challenges in accurately estimating resource requirements and labor scheduling, overstaffing or understaffing occurred depending on the branch locations and types.
- The existing scheduling software was too difficult to use and the user interface was outdated.
- Existing software did not provide functionality for scheduling multiple branches and shared resources.
- It was difficult to access branch schedules and request time-off.
- Employee engagement and retention needed to be improved to ensure success with the branch transformation investments.

## Solution Features and Benefits

**Scheduler** provided solutions to address the needs of three key stakeholders, each with unique challenges.

### 1. Line of Business Leaders:

Market managers now have real-time views into markets. Using dashboards, they can immediately identify overstaffed and understaffed branches, drill down to problem areas, assess the quality of schedules, and work with branch managers to solve problems.

### 2. Branch Managers:

Branch managers now have the ability to view all the staff members in their roster, including those who work in another branch, from a single screen. This is especially important for scheduling multiple branches. The roster view can be customized in terms of full-timers, part-timers, and staff with rotating schedules.

The ability to include non-customer-facing time in the schedule ensured staff could complete operational and administrative tasks without affecting customer service.

Template schedules for each week can be created and copied forward to be customized, minimizing the time needed to create weekly schedules, which now can be created within a matter of 10-15 minutes using tablet devices.

### 3. Branch Workforce:

Using mobile devices, staff members can now view their weekly schedules and request time off from their managers. **Scheduler** provides easy access and visibility into schedules.

*“Our scheduling solution had to be a win-win-win for the branch workforce, branch managers, and line of business leaders. Kiran Analytics delivered on their promise to address the needs of all three key stakeholders.”*

– Director of Workforce Management



Market Managers



Branch Managers



Branch Workforce





## Pre-requisites to Reliable Scheduling: Accurate Forecasting and Resource Alignment

The bank executives knew the frequency and nature of customer interactions at the branches were changing, but they wanted to better understand how things were changing using analytics rather than relying on anecdotal unstructured feedback.

### In Branch Observations

Kiran Analytics conducted over 1,500 hours of in branch observations in more than 30 branches. Kiran's proprietary process and data collection tools were used with minimal impact to the branch staff and without disturbing the customers. The data collection and analysis of the observation data were key inputs to the predictive models used to generate accurate customer demand forecasts.

Rather than intuition, the bank executives wanted to utilize workforce analytics to align their branch staff with customer needs and to schedule their branch colleagues in the most efficient way.

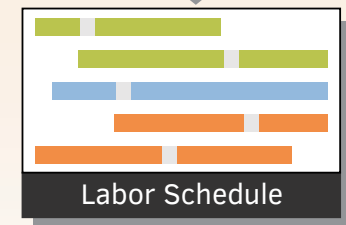
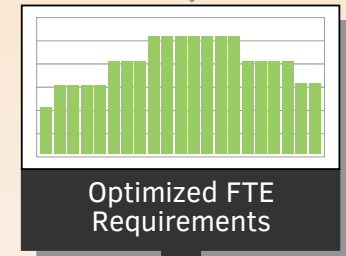
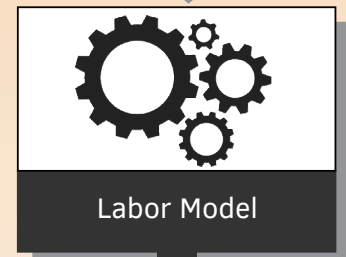
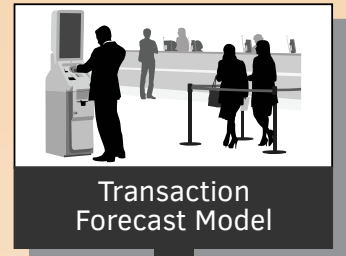
### Transaction and Labor Models

Two months prior to the deployment of the scheduling solution, Kiran Analytics developed forecasting models using in branch observations, transaction volumes and mix, branch attributes (type, demographics, seasonality, etc.), work content (customer facing and non-customer facing), queuing and service level goals.

### Validation of Models

Kiran's analytics team validated the forecasting models using 25 branches from nine regions. Over a six week period, FTE requirements generated by Cloudcords [Forecaster](#) software were utilized by each branch manager to schedule their branch staff. This process validated the accuracy of the predictive and prescriptive models and increased the confidence of the branch managers. Following the validation stage, [Forecaster](#) software began delivering half-hourly FTE requirements for each and every branch in the network.

These FTE requirements serve as the inputs to [Scheduler](#) software and guide the branch managers to create optimized labor schedules.



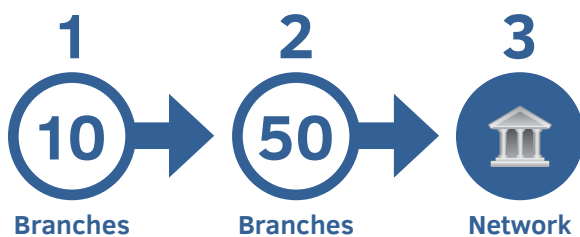


## Solution Delivery

Due to the large size of the branch network, the project team decided to roll out Scheduler software in phases. Training included ninety minutes on the use of Scheduler with the balance of the time focused on how to use the forecast to drive meaningful discussions with branch personnel about changing hours to better serve customers.

### Three Phase Roll Out

In the initial phase, ten branches from a single market were rolled out. In the second phase, about fifty branches were rolled out. The remaining branches were rolled out in an aggressive schedule paced with the ability of the bank to train branch managers.



This phased approach allowed the project team to gather initial feedback in a small market relatively quickly. With user feedback from each phase, adjustments were made to improve user experience and training. By being agile and responsive to critical user feedback, the project team was able to garner immediate buy-in from end-users.

Branch managers who went live in the first phase participated in the training for the second phase. This provided support to the market managers who led the training process, but also provided peer support to other branch managers who had yet to go live.

The phased approach also enabled Kiran Analytics to capture enhancement requests in the first two phases and provide rapid responses with software updates prior to the final rollout phase.

Kiran Analytics continues to provide post implementation support:

- Regular meetings with the project team to capture user feedback and provide software roadmap updates
- Semi-annual software updates delivered in a Software-as-a-Service format
- Assistance with reporting and adherence to ensure that the initial solution benefits are retained, and increased over time.

*“Kiran’s Scheduler is so easy to use that our branch managers needed less than two hours to learn the software and reported that it was ‘easy’ and even ‘fun’!*”

*Branch managers can now spend more time doing what is important as the software provides a quick and easy way to do their resourcing.”*

– Region Manager





## Results

With **Scheduler**, branch managers are able to create optimized schedules quickly, evaluate what-if shift scheduling scenarios, visualize the impacts, and manage labor schedules.

With **Scheduler's** dashboards and reports, line of business leaders are able to view the quality of branch staff schedules and make sure that scheduling optimization is achieved at the aggregate level to improve customer experience and employee engagement.

Branch staff members can access their schedules from their mobile devices, request time off, or learn about available shifts in nearby branches.

Branch managers and staff members with flexible employee contracts can now use **Scheduler** to plan ahead in a way that addresses both the bank's staffing needs and the staff members' preferred workdays. This results in improved employee engagement.

Customer branch experience depends on happy, engaged, and productive employees. When frontline staff is more engaged, customer satisfaction and loyalty improves.

The executive sponsor of the branch transformation initiative and the Director of Workforce Management pointed out three key criteria for selecting Kiran Analytics and the **Scheduler** software:

1. Proven track record in labor modeling solutions for retail banking
2. User friendly, mobile-friendly Scheduler software provided as SaaS
3. Deep expertise in analytics



**Increased Collaboration**



**Expanded Accessibility**



**Improved Customer Service**



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