



KIRANanalytics  
SUMMIT 2018

SEPTEMBER 13-14 | LA JOLLA, CA

## **Panel Discussion – Position Planning**

Gina Burmeister – U.S. Bank

Maher Kaddoura – Fifth Third Bank

Abhyuday Desai – Kiran Analytics

# Position Planning



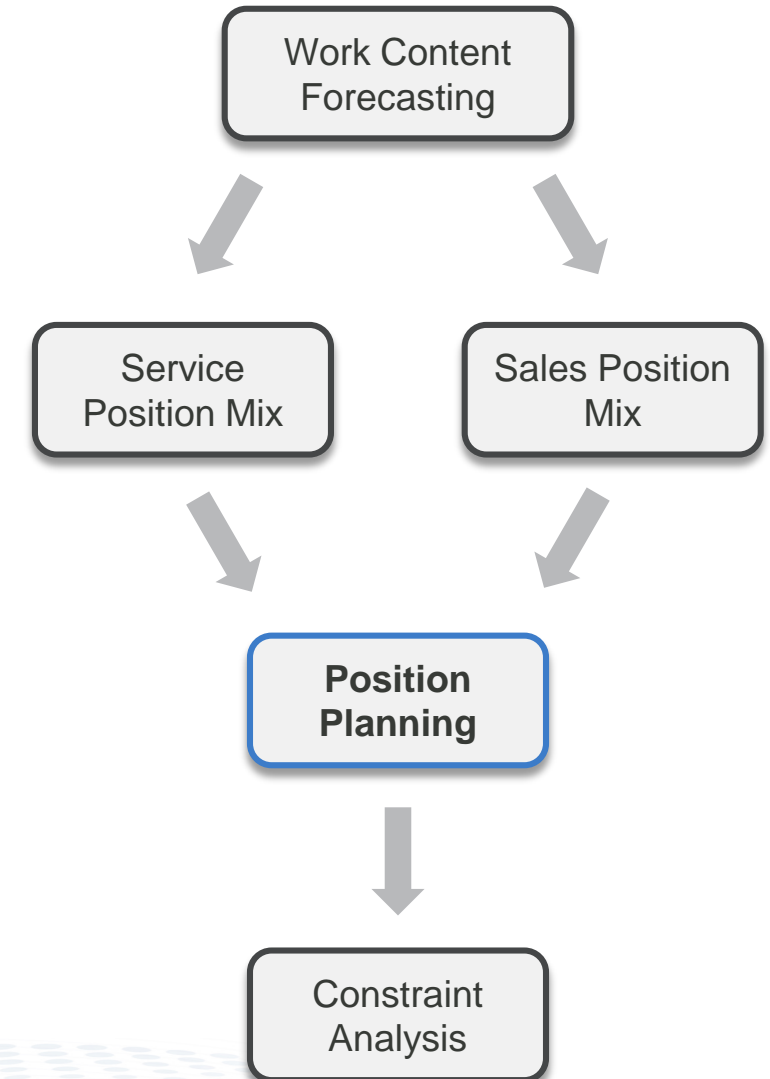
## Model Drivers

- Forecasted Work Content
- Branch Type
- Opportunity
- Customer Segments
- Strategy and Business Rules
- Sales and Service Position Mix
- Cost/Revenue by Role
- Constraints

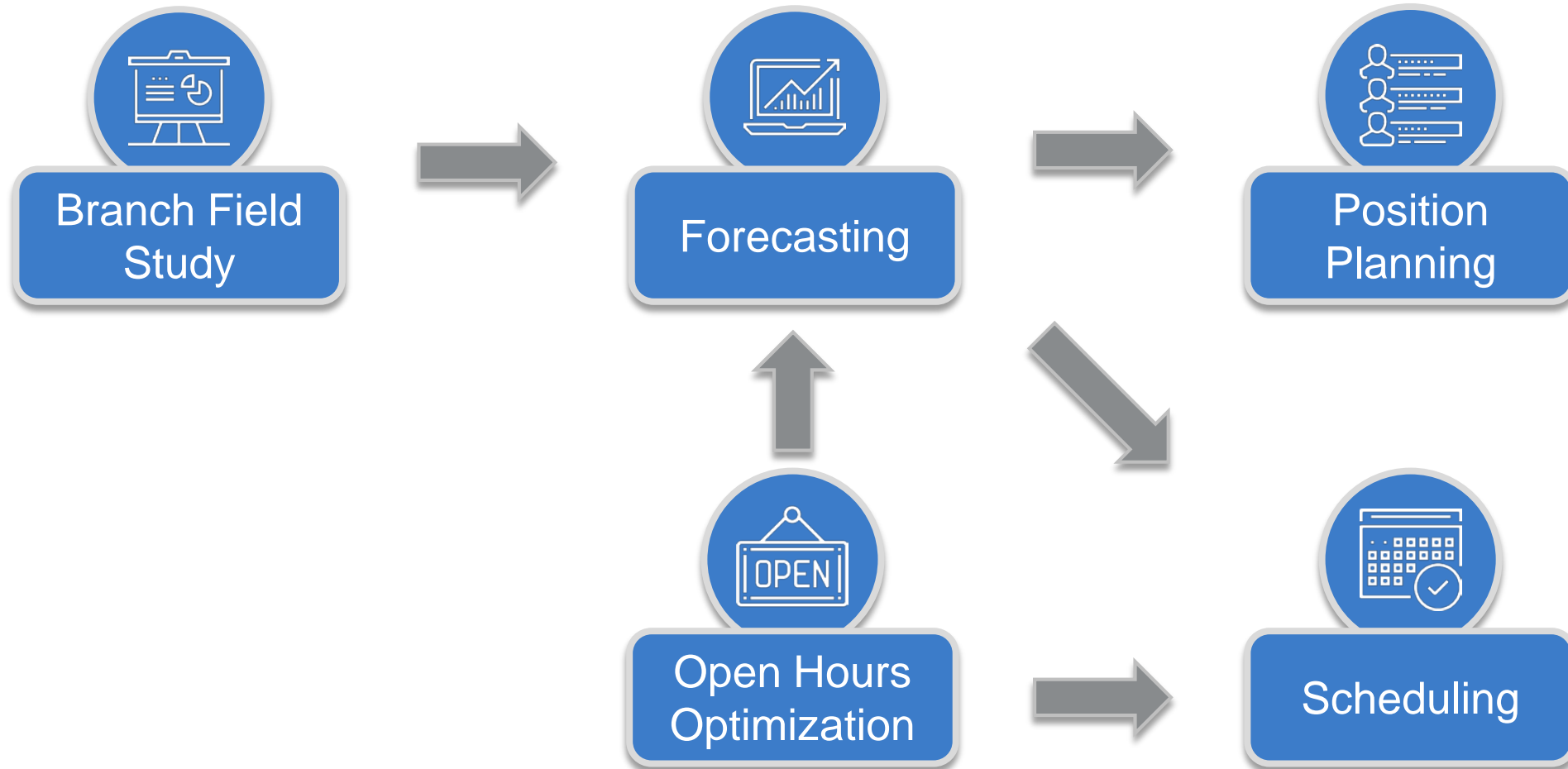


## Benefits

- **Align** service and sales capacity with market opportunity
- **Maximize** revenue in growth markets
- **Minimize** cost in efficiency markets



# Complete Enterprise WFO Solution Deployment

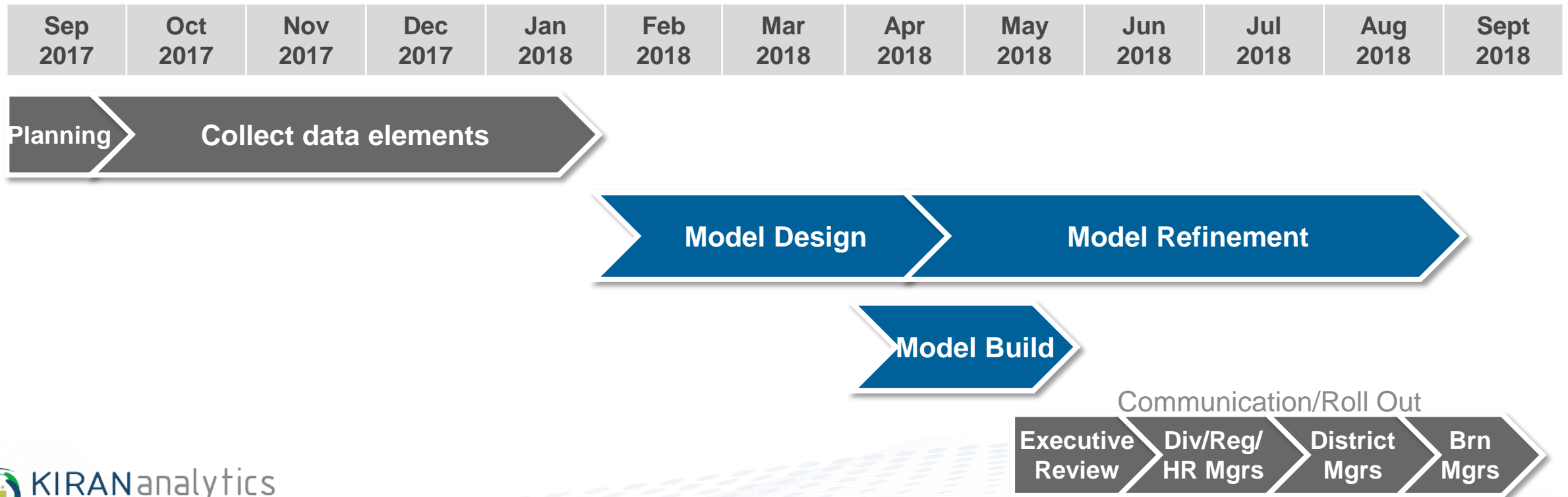


# Panel Discussion – Position Planning

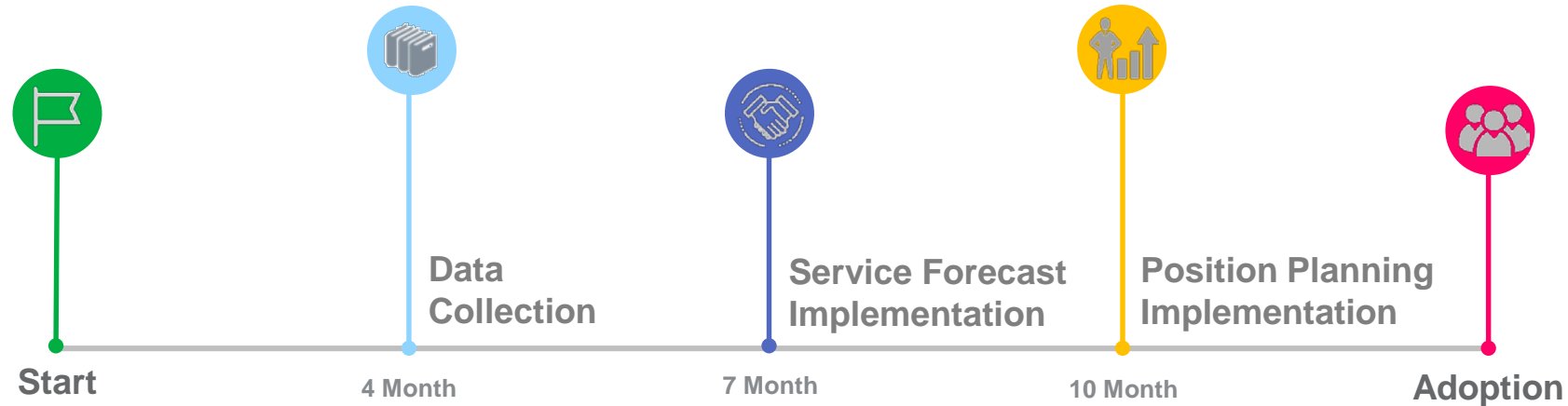
**How long did it take to go through Design, Build, Results, and Implementation?**

# U.S. Bank Position Planning Timeline

- Business lines, human resources, and finance partners were involved throughout the process
- Data challenges: Third Party Risk Management, Net Present Value (NPV) and Historical Sales data
- Design challenges: observations from field study were different than business line's target work allocations
- Roll out challenges: explaining the results, i.e., profit to cost ratio, business rules, or strategy as the driver
- Model refinement: adjusting business rules, application of operating minimum, and maximizing headcount



# Fifth Third Bank Position Planning Timeline



## What we've learned

- Improved Universal Banker Visibility of Service and Sales Productivity
- Insight Into Optimal Banker Distribution
- Maximize Platform Opportunity

## Where we are going

- Sales Driven Model to Relationship Management Model
- Customer Service Experience Focused
- Bankers Book of Business P&L

# Panel Discussion – Position Planning

**What prompted your organization to engage in position planning?**

# Panel Discussion – Position Planning

**What added value did position planning bring to your organization?**



# Panel Discussion – Position Planning

**How did your retail leadership team accept Position Planning? Did you face any challenges from them?**

# Panel Discussion – Position Planning

**What's next in the Position Planning evolution for your organization?**



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**Thank You!**