

# National Planning Awards

## Information Pack 2018

These prestigious awards showcase excellence in planning; recognising individuals and teams. The Planning Awards represent a major step in the growth of planning as a professional community in customer operations.

Could you be a winner of the Planning Awards? It's a fantastic opportunity to gain external recognition for the hard work and success achieved by you and your planning team(s).

As you would expect from The Forum's reputation, the standard of these Planning Awards is sustained by rigorous assessment that involves members, finalists and experts.

Uniquely this awards programme includes an element of peer-assessment, the chance to hear other finalists at our Finalists' Day, as well as the opportunity to hear and see presentations from all the award winners at the National Planning Conference.

Awards are offered for both individuals and teams, with 8 main categories and other awards such as 'best in sector'. This makes it distinct from our Innovation Awards.

Individual award categories include:

- Planning Analyst of the Year
- Planning Manager of the Year
- Rising Star Award

Team award categories may include:

- Best in Sector
- Real-time management
- Scheduling
- Forecasting
- Planning for Back Office or Enterprise wide planning
- Overall Planning Team

Shortlisted nominations will present at our **Finalists' Day**, which offers insight from networking & peer review.

Winners will be announced at the prestigious **Gala Awards Dinner in September\***.

Winners and colleagues will share their stories at the **National Planning Conference in November\*** making these awards a vital part of the annual calendar of learning and best practice.



Above all, the Planning Awards support the professional community in raising standards, by sharing with others what makes the most successful individuals and teams stand out from the crowd. This helps promote best practice and create understanding of how planning can make the difference.

The initial nomination process is quick and easy. Feel free to call us for further help. We look forward to receiving your nomination shortly.

***Phil Anderson***

Programme Leader

# How to apply

## Frequently Asked Questions

**Q: Who can apply?**

**A:** The awards are open to planners in any customer contact operation serving customers in the UK or Ireland. If you service other areas as well, your nomination should cover all aspects of your work. You do not need to be a member of The Forum. The 2018 Finalists' Day, Awards Gala and Conference are in England.

**Q: How is it judged?**

**A:** A panel of experienced planning professionals will assess shortlisted nominations against the criteria on page 4. Shortlisting is based on a simple nomination form, which ensures that nominations meet the required standard. All shortlisted nominees are asked to present at our Finalists' Days in June/July\*, where assessment will include both peer review and review by our expert judges.

**Q: What does it cost?**

**A:** The entry fee is £195 plus VAT. Payment is only taken once shortlisting is confirmed; you do not pay anything if you are not shortlisted. The entry fee includes participation in our Finalist Day and one place at the Awards Gala. Winners gain a free place at the National Planning Conference where they talk about their work. We do not meet travel or other expenses.

**Q: Can I get a company invoice?**

**A:** Normally individual nominees pay by credit card, but we can invoice the company if you are entering nominations for more than 1 category or in exceptional circumstances.

**Q: What is required of finalists?**

**A:** If shortlisted, we will ask you to prepare further evidence to support your nomination and to create material for the Finalists' Day. The format of this day does not require previous presentation

experience, as judges will help you draw out the material in pre-prepared hand-outs or slides. Some questions may be asked and we will ensure that this process is as easy for you as possible.

**Q: Is there a site visit?**

**A:** No, unlike the Innovation Awards, We do not visit all nominees, but will use the Finalists' Day to assess entries. This is in order to make this programme affordable and accessible to as many entrants as possible. We do ask winners to talk about their work at the Planning Conference, but there is no requirement at this stage to host a site visit for members, although winners may wish to if there is demand.

**Q: Do I have to be a good presenter?**

**A:** No, although we do ask winners to share their work. A colleague may present your work on your behalf. We also have a number of formats in which those who are not confident presenters can still talk with other members.

**Q: What about confidential information?**

**A:** Information for the judges will be held in strict confidence; this will not be made available to competitors or others that you specify. We ask you not to present confidential information on the Finalists' Day or at the Planning Conference, but to share how you achieved success in other ways, as this material is in the public domain.

**Q: What is the next step?**

**A:** Look at the process and deadlines on the following page. The next step is to register your nomination at the earliest opportunity and to complete the nomination form which allows you to give information simply, so that we can assess it against the judging criteria.

# Key Dates

## Step-by-step: making it easy

### It's quick & easy to get started

All you need is this information pack, a registration form and a nomination form. Within a few minutes you can gather the information you need to register your nomination.

#### 1. Initial Registration in December

The simple registration form gets you on the track to winning. You can nominate teams or individuals and you need to tell us who is supporting this within the business. A signed copy will be required, but you can scan or photograph this and email that back. If you need more time, speak to us now.

#### 2. Supporting information by 31<sup>st</sup> May

The short nomination form allows you to present evidence for all five criteria, by simply answering a few clear questions. This is to ensure that you meet the standard required for shortlisting. This is a prestigious national competition; preparation is required and we look for 2-3 supporting testimonials.

We do everything we can to make this part of the process as quick and easy as possible. Speak to us if anything puzzles you or is taking too long. There are separate forms for teams and individuals. For individual awards, either the nominee or the person nominating them can answer the questions, but both need to be involved. For team awards, one person can do the work on behalf of all, or many teams will find it motivating to work together as they identify their achievements.

#### 3. Shortlisting in June

We will let you know individually as soon as we can if you meet the standard for shortlisting for the category you have entered. Normally this is assessed by The Forum panel. In some cases, further information is required of longlisted nominations. By mid of June, we will be in a position to announce the full list of finalists in every category.

#### 4. Finalists' Days June and July

If shortlisted, we will ask you to prepare further evidence to support your nomination and to create material for the Finalists' Day. This day gives the chance for everyone to present their case, meet other finalists and be involved in understanding and assessing the entries of others in your category.

#### 5. Awards Gala evening in September

The award winners are announced and presented with their awards during a fabulous black-tie Awards Gala evening. This is where we salute your achievement, celebrate your success and present the award winners with their trophies. Motivate your teams or clients with a real celebration.

#### 6. Winners' stories in November

Winners will be asked to share their story at the National Planning Conference in November. This is a chance to showcase the best of the planning profession – and get up to date with work in all areas of planning. We can discuss with you the best way of getting this message across or whether you would like a colleague to represent you. For team awards, you may want to nominate a particular individual to do a presentation. Please speak to us at once if this gives you any concern. Don't let it get in the way of your nomination; we have a lot of experience of different approaches.

#### Next steps.

More detail is provided in the following pages, but we welcome your questions.

Email Alison Conaghan, Planning Specialist using [planningawards@theforum.social](mailto:planningawards@theforum.social).

#### And remember the key dates!

We will confirm these dates on receipt of your registration form.

# Judging Criteria

## Recognising excellence in planning

The Planning Awards are presented to individuals or teams and assessed against these five criteria. The winners will show how ‘numbers meet people’ to create visibly improved results for the service or business.

### 1. Engagement & credibility

Our innovation award judges and others on the LinkedIn discussion highlighted this as a key ingredient for a winner. What relationships do you foster and develop? How do you do this? How do others perceive you or your team?

In the judging process, if shortlisted, we will ask you to offer your evidence about the benefits of this on the role and contribution of planning, as this relates to you or your team.

### 2. Outcome & impact

A great planning team, analyst or manager is not one that just has great processes and relationships but one that has these and uses them to good effect, to make a real difference to their organisation.

A key differentiator for these awards is the way in which planning is contributing to vital strategic imperatives of your business or service – as well as making a noticeable difference for stakeholders. For this reason, making a difference is an important value within our professional communities.

### 3. Continuous learning & improvement

What takes us from good to great as planners is the ability to continuously develop the contribution that we make, which is embedded in our operational excellence model.

Any evidence of change and improvement is a great example of making a difference, but can you provide further evidence of a track record of improvement over time, including any future plans? What is enabling this?

### 4. Use and communication of numbers

How are you turning data into insight and helping others to take appropriate action out of the data available to you?

How do you tailor information and relate it to the needs of your audience? Are you able to talk about the key numbers within your performance data in a way that inspires confidence and action?

We are looking for examples of how you have communicated information (based on numerical analysis by you or others) that has been acted on and supported a demonstrable change in behaviour among key stakeholders.

### 5. Professional Development

How have you developed yourself as a planning professional? We are looking for understanding of the factors that build towards the contribution of planning – to make a difference – and evidence of how you are making this happen in your role or team.

What have you done? How has this changed your contribution in any of the areas above? What support or resources did you draw on? Why does this matter to you as a professional?

In addition, the ability to demonstrate how others can learn from your work is an important factor in ensuring that judges and peer-assessors have understood your success and the reasons for it.

# The Finalists' Days

## June & July

The day is expected to run from 09:30 to 17:30 – with registration from 08:30.

Finalists only need to attend for the session on their category. However, you are welcome to be there for more of the day, listen to other categories where space permits and enjoy the other presentations and networking opportunities. Please let us know at registration if a session starting at 09:30 or ending at 17:30 is a problem for you from a travel point of view. The exact agenda will be published once the numbers in each category and sub-category are finalised.

All finalists will be asked to attend and be interviewed. This is an essential element of the judging, as well as a networking and benchmarking opportunity. An important part of the community calendar, it is only open to finalists and others involved in the awards process. It will include the opportunity to see presentations, take part in round-table discussions and enjoy networking in the main room, as well as the category-specific presentations by nominees in the judging rooms.

Each award category will have a session for all the finalists, with you, to ensure that you are supported in getting the message across. We are not looking for you to be ambushed with questions!

The table below shows how the day is expected to run.

Registration, networking, expo, formal introduction and welcome			
2 hour session	90 minute session	60 minute	Late registration and networking; may include round tables, technology showcase, 1 to 1 meetings
	Comfort Break	Comfort Break	
Comfort Break	90 minute session	90 minute session	
90 minute session	90 minute session	90 minute session	
Networking Lunch	Networking Lunch	Networking Lunch	Networking Lunch
90 minute session	60 minute	2 hour session	Late registration and networking; may include round tables, technology showcase, 1 to 1 meetings
	Comfort Break		
Comfort Break	2 hour session	Comfort Break	
60 minute	90 minute session	90 minute session	
Formal close			
Judges Discussions			

# The Awards Gala

## September



The Gala Dinner is where we announce and celebrate the UK Planning Awards 2017 winners. This is a fabulous black-tie event, which includes entertainment, live music and dancing into the early hours. Each of the winners will have an inspiring story for us to learn from later in the year at the Planning Conference, but this is where we salute their achievement, celebrate their success and present the award winners with their trophies. This is a great chance to meet planning professionals from other contact centres and seriously motivate your teams or clients with a real celebration.

## 2017 Award winners:-

- **ADT**, Team of the Year Award
- **Severn Trent Water**, Team of the Year Award
- **Capita Life & Pensions**, Team of the Year Award
- **Sky Betting & Gaming**, Project of the Year Award
- **Worldpay**, Project of the Year Award
- **RSA**, Continuous Improvement Award
- **Craig Ide, L&G**, Manager of the Year Award
- **Mark Jobson, AXA Direct & Partnerships**, Analyst of the Year Award
- **Jonathan Oldroyd, Yorkshire Ambulance Service**, Analyst of the Year Award
- **Joshua McDonnell, Co-operative Bank**, Rising Star Award
- **Morgan McLeod, RBS Bank**, Rising Star Award
- **Leanne Grant, RS Components**, Rising Star Award
- **David McGuire, AXA Direct & Partnerships**, Hero Award
- **Eurostar**, Challenge Award

The following were highly commended by Judges

- **Ross Parkes, Homeserve**, Analyst of the Year
- **Steven Johnson, Virgin Money**, Manager of the Year