

# Developing the role of the real-time team

When the real-time team can move beyond fire-fighting, the wider organisation has much to learn. Phil Anderson talks to members about how to start learning proactively and identify changes that can be built back into the plan.

A Real-Time (RT) team is the key link in the chain of communication between planning and the operation; telling the story of the day before it happens, as it happens and advising on improvements. RT teams can make or break any plan. It's such an important function that, last year, we kicked off a series of real-time master classes with six members active in this area. The aim was to undertake a detailed review of the function and understand if there are processes, or principles which should be promoted as best practice. The full **white paper** can be found online.

All this has helped us to establish a time horizon for best practice – from the schedule release to the on-the-day operational management – ending with a formal pass back to the planning team to improve plans. Repeating the planning cycle, based on the operational excellence model, at each of these time horizons enables effective continuous learning. Crucially, this means that RT become key partners in taking longer term operational learning from situations that arise. It is like gaining customer insight by talking to the people who spend all day talking to customers. The RT team are the closest planners ever get to the real 'coalface' on a daily basis.

The first planning handover is after schedules are finalised or released – usually shortly prior to the day or week of operation. This will involve a forecast, scheduling refinement and activity/shrinkage adjustment to create an up-to-date, on-the-day projection or re-forecast. Failure to do this can lead to fire-fighting and a feeling of playing catch-up – for example by updating activities and

absences which were already known (by someone!). The preparation, analysis and communication of such a projection helps to provide a "running start" prior to the handover to on-the-day management. More importantly it sets expectations prior to the day, providing an improved view of the day that could never have been known when budgets were set, or even when schedules were released.

The next time horizon is operational planning, during the day of operation, which creates more proactive real-time on-the-day management. Again, the core steps of the planning cycle are repeated with updated information – to review, reforecast and refocus the operation. Relevant interval analysis reporting aids operational decisions; this, rather than 'fire-fighting' is the role of an RT team. For example they might prepare or implement

tactical or contingency plans, working with a range of managers and functions to resolve issues and drive operational learning.

At **EE**, Kevin Horan, Head of Real Time, says that "every 15 minutes, via our internally built tool, we use reforecasts to drive change via our live conference call". They don't publish reforecasts, but it happens 'behind the scenes' and triggers actions when they are needed. **EE**, finalists for their work on RT in the 2013 Innovation Awards, have created outstanding local relationships between planning and the operations teams, who are the internal clients or partners of the RT team. The RT team at **EE** have also delivered £1.2m of extra time off the phone at no extra cost, through their proactive approach to RT. "There are big benefits to organising offline time", explains Angela Howley, Head of Operations at **EE**.

## Short term forecasting and the planning handover

"Operational forecasts are reviewed on a Friday to give a view of the weekend... we set expectations with the wider business by producing a weekly and mid-weekly report... we detail what mitigation actions we have taken to improve performance."

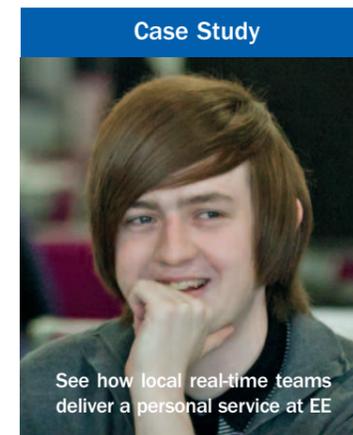
**Amy Sewell is Real-Time Manager at QVC.**

"Short term forecasting is weekly, based on a rolling 4 week period... We look to see if we can offer short term flexibility, which may include the changing of agents shifts... or offering out overtime if required."

**Kirsty Watson is Real-Time Manager at British Gas.**

"Forecasts are re-assessed a month, a fortnight and then a week in advance, after which the plan is handed over to Real Time. By then all mail-shot timelines, off line activities plus flexi and fixed rotas will have been finalised and shrinkage percentages added."

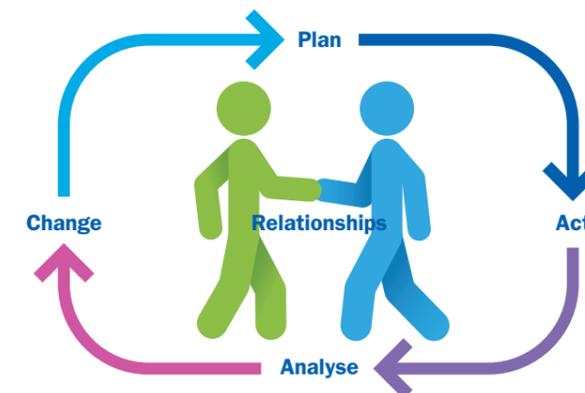
**Jacqui Haines is Real-Time Analyst at UCAS.**



"It has allowed me to re-skill more staff... and the educational piece is very beneficial... it brings agents on board".

These approaches are recognised as good practice, by others involved in the RT Master Class series, who are all looking to enlarge and develop their toolkit for being flexible or agile in making short-notice resourcing changes. For instance, at **British Gas**, Kirsty Watson has the ability to move lunches for example – "however we would ASK the agents rather than tell them if we need to move a shift". **Iain Angell**, at **npower**, also optimises lunches and breaks, as well as sliding pre-planned coaching sessions, 1-2-1's etc. "We would try to schedule these in during the quieter periods", he adds. At **QVC**, **Amy Sewell** observes that "any tactical movements made within campaigns can have a commercial impact, so it is important that we understand what this impact is before the change is made".

Perhaps the most radical change in the role of the RT team, however, is the growing focus on review and analysis. This might happen during the day, at the end of a day, after the day or after the week. There is often the need to review the previous day in intervals, then review the week in days, discussing and learning from both planning and the operation. The main aim is to make sure you do not repeat bad habits. There needs to be a continuous learning loop to aid better planning and this will need



engagement, buy-in and involvement of different functions such as operation, finance, marketing, and HR and so forth.

**Phil Anderson is Contact Centre Specialist at the Professional Planning Forum.**

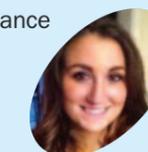
## Operational learning – proactive review and analysis

"We can review the day in real-time, but we always review the following morning... the chance to share best practice with other contact centre support teams is the best way to improve."

**Iain Angell is Dialler Manager at npower.**

"We play a part in forecast accuracy as a RT team. We review daily volumes and analyse intraday performance to understand where we are able to improve SLA. We look at weekly and daily profiles to highlight trends back to the planning team."

**Amy Sewell is Real-Time Manager at QVC.**



## Digging Deeper on this topic



**Strategy** read online the full white paper from our advisory board on strategy for real-time teams. Add your comments.

### Master Class

This 2-day workshop gathers real-time specialists to focus on specific real-life challenges brought by each participant.

**Advanced Planning Techniques** our university accredited training includes the chance to focus on real time and tactical planning.



### EE case study

How local real-time teams deliver personal service and created £2.2m off-phone time at no extra cost.



For more information visit our website: [ppf.bz/ppfRealTime](http://ppf.bz/ppfRealTime)