

Enterprise planning and resourcing for your field force

Do you have a fleet of vans, technicians, sales or support teams operating out in the field? Are you talking and sharing best practice with your counterparts in other organisations? Dave Vernon invites you to join the Planning Forum's newest support group.

As the enterprise planning and field networking group enters its second year, this is the time for any Planning Forum member organisations with field-based staff to seek out their planning counterparts. With many organisations now trying to remove internal siloes and plan at the customer journey level, the need to plan as a whole organisation has never been more important.

Talking with members this year, I have found that there are few organisations where the call centre planners and the field planners ever interact. To even find the name of the heads of each of these areas from the other area usually takes a lot of internal discussion and much intranet surfing before a name is delivered. My challenge to our industry is to change this by the end of 2015, as how can we claim to be effective planners when we are operating within such vertical siloes and the capacity plans are usually so intrinsically linked. Are you up for this challenge?

A great example of the power of joining up planning across an organisation is demonstrated massively in new case study from **UPC** this year (page 89). What it demonstrates is that the planners within that company are communicating across operational siloes and understand the impact each has on the others. Collaboration is fundamental to their end-to-end planning methodology and as a result they can understand how changes in one assumption impacts all parts of the customer journey rather than, for example the call centre in isolation.

Without the communication and process that underpin this approach we so often see failure points further down the customer journey or lifecycle which create operational and customer experience problems that have not been planned for. It reminds me of the relationship many contact centre planning departments had with their Marketing Department in years gone by, where changes would be made to campaigns with little regard for the impact or change in demand to the contact centre. We as a planning community are now guilty of doing the same to our planning or operational colleagues in other parts of our organisations.

So, what can be done? I am asking you, as our members, to make this the year when you start joining up planning within your organisation to reflect the journey of your customer. We as a profession need to get ahead of the curve on this, as many

organisations have aspirations to move to this, customers are becoming more demanding and the channels of communication or delivery expand.

It is possible – UPC have proved it this year, **ADT** proved it with their case study last year and you can too. Field and call centre planners need to be talking. These deep operational siloes that have developed in many organisation need to be levelled. The benefits this can bring include increased sales, reduced failure rate, reduced engineer visits, improved employee engagement and reduced carbon footprints. Are you up for the challenge? Please get in touch now!

Dave Vernon is Head of Membership at the Professional Planning Forum and leads the new Field Networking Group.

[Links to the articles and research and further resources can be found on-line at: ppf.bz/PPFenterprise.](http://ppf.bz/PPFenterprise)

Have you joined our newest support group?

Upgrade your membership for just £795 +VAT and join these other members to make a real difference in this area. Tap into this network for regular advice and best practice.



This year we have a great case study from UPC on (page 89) showing collaborative planning across all areas of the organisation including the field technicians. More resources and case studies from 2013 and 2012 at ppf.bz/PPFenterprise.