Planning process: how can we really make a difference?

In their final integration workshop students on our advanced certificate share what they have learned from their work-based projects. John Casey reveals how their 'process reviews' have already given back great benefits, helping improve planning in their operations.

In the Advanced Certificate programme with the University of Ulster, formerly the Planning Forum's Foundation Certificate, students are encouraged to question and understand, not to accept processes for what they are. Significantly, they undertake work-based review projects and,

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depending on the maturity of the planning function in their operation, this leads to many different experiences. Some students are reassured that they are doing things the right way; others identify changes would lead to improvement for customer, business and employee.

Crucially, the process of review allows even junior or inexperienced planners to discover how they can make a difference. There is much to learn here for all of us. When was the last time you sat down for an afternoon and looked at how you forecast, schedule or manage real-time from start to finish? Do we have the discipline to notice when a planning process is no longer providing the desired behaviours, results and efficiencies? The process of review helps to unleash the potential of our teams.

Process reviews don't have to take long – in fact we encourage our students to spend a few hours looking at how their organisations forecast, schedule or manage real time and to summarise it in a page. By looking from long term to short term, they ask if these processes are delivering as expected. For example: Are we thinking of special

events far enough in advance? Does the release date of schedules encourage sickness due to lack of notice to suit agent's personal lifestyle? What real-time tasks today could have been processed a few days in advance freeing up on the day resource to deal with issues?

I'm privileged as part of my role to meet with many of these students at the end of their five month programme when they share what they have learned and it's an inspiration to listen. Let me share a few examples with you.

For Jade Marshall, Planning & Quality CTL at **WhiteConcierge**, the reviews were a chance to gain insight into her new role. Having been previously a Team Manager,

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she thought she understood how things operated, but soon realised there were gaps in her assumptions. She spotted inefficiencies on how rosters were delivered that gave opportunity for error when items were transcribed. Consolidating to a central source not only removed this risk but more importantly freed up colleague time to work on agent development.

Ufuk Cotuk, an ex-colleague of hers at **WhiteConcierge**, realised that delivering schedules at short notice is as cost effective, due to the amount of adhoc processing of changes required. What is more,

releasing schedules a little earlier benefited the business as it provided more time to get the right coverage in place and it was also beneficial to colleagues, as they need notice to fit their lifestyle priorities around their work.

On the theme of workload and minimising the changes needed, Tracey Campbell, Lead Analyst at **Affinion International**, also focussed on adhoc changes and associated tasks in her business. However she stepped back and considered root cause. Often the reason for change requests comes from lack of understanding or lack of knowledge with Team Leaders and/or floor walkers making the request simply because they were unable to answer questions themselves. Through an education programme the process was streamlined and the time needed to process the adhoc requests eliminated.

This was also the experience of Nicola Vaughan Resource Planner at the **Environment Agency**. Nicola realised that such education is not a one-off programme and she continues to devote time with key managers across the business to go over planning processes and discuss impact, particularly with respect to real-time so that processes are adhered to in a consistent manner.

At **Yorkshire Ambulance Service**, Wayne Deakin the Workforce Planning Manager, realised that although the real-time duties are split between the Team Leaders,

"I am still responsible." In competitive markets gaining the resource to set up a dedicated real-time team is not something easily achieved, especially in smaller organisations, which is why real-time became a 'process' shared by people in many different roles. What Wayne identified, from his review, is that as owner "I need to ensure everyone is skilled enough to make the right decisions." That isn't just through skills training but also through the production of meaningful MI that tracks the impact of actions and gives them the data they need to understand the importance of their actions.

This is something which other students frequently comment on – they see things in a new way as a result of doing a review – and this is valuable whether you are a planner or an operations manager. When Mark Blake, Senior Manager, Support Department at **Rational Group**, reviewed how his company forecasts and schedules it was quite a wake-up call: "not only do I now understand areas I may have chosen to ignore in the past, I also understand the part I need to play, by paying attention to the data I give those departments. When you have many hands in a process it's easy to understand why the final product is not as expected, especially if not all paying full attention to it." Mark went a stage further than most, by creating a new role to take some of

the ownership and pay that attention that the process deserved. This is an improvement that would not have happened without re-examining existing processes.

Sometimes the process review is the impetus to develop new processes from scratch. All too often people claim "we don't have a real-time process" when they really mean they don't have a real-time team specifically focussing on the associated tasks. As Andrea Murphy, Contact Centre Manager at **Slater and Gordon UK**, discovered "the process has to exist irrespective of the people who complete it."

As soon as we start changing lunch or comfort breaks to cover for sickness or other unexpected activities then the process exists – size and volatility usually move

centres to dedicated ownership. The key is understanding where we want to go.

Sheena Hunter, Resource Co-ordinator at **ACCA**, found herself hired into a new role and whilst reviewing processes helped her understand her involvement in the business, it was combining this with a benchmark visit to another centre which gave her insight. "I could see where our department will be in 5 year's time". (These visits are also part of the five month advanced certificate). The process reviews have helped her identify the roadmap to meeting that vision and only by going back and reviewing her processes will she be able to stay on that road and bring the structure and associated efficiencies to her business.

The students mentioned in this article may have reviewed processes due to the format of the study they were undertaking, but reading their assignments and findings highlights to me why it is important that everyone steps back and looks at their planning processes and the behaviours these encourage. The challenge is there to review, learn and improve rather than accept things for what they are.

John Casey is Operations Director at the Professional Planning Forum.

Digging Deeper on this topic

Online resources read the longer article and see conference presentations.

Student Case Studies read more on pages 20 and 28.

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