BT Case Study

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The planning process

- Demand Management
- Resource Planning
- Workflow Management (day-to-day)
- Performance Management
- Costing

1. Provide Volume Forecast
2. Translate data into Volume & Manpower requirements
3. Provide investment deliverables
4. FTE Supply Forecast
5. Resource capacity and deployment plans
6. Resource schedules (Field force)
7. Resource schedules (Controls)
8. Measure Field Performance
9. Measure Controls Performance
10. Forecast OPEX and CAPEX (Finance)
11. Total Cost of Production
The Way We Put It Together Is Field Force Optimisation Suite

- **Customer Systems**
  - Historical Demand
  - CRM API
  - Mobility API

- **Field Forecast**
  - Long Term
  - Short Term

- **Field Reserve (Appt Books)**

- **Field Plan**
  - Forecasted Demand
  - People Profiles

- **Field People**

- **Work Manager**
  - New Orders/Reservations
  - Attendance Skill/Geography

- **New Orders/Reservations**
Demand Planning

TONY FROST
GM DEMAND PLANNING, BT TSO
Demand Planning Landscape

- Forecast accuracy has improved significantly with closer sales & product engagement.

- We learned an important lesson about mixing supply and demand metrics, recognising backlog and WIP is fundamental.

- We have a clear 3 year strategic!

- Focus is to develop the MTP to better reflect the certainty of demand across a longer spectrum and identify triggers.

- Production Line MIS is at very different levels of granularity e.g. offshore vs. UK resource, Field work manager vs. desk based applications.

- The wider plan is to focus on tools to enable e2e Production Management, underpinned by a common data warehouse. But we need to be much better at unifying tactical and operational forecasting.
Integrating Demand & Supply

- Ability to match employees to skills
- Supply plans by skill & region
- Activities matched to booked hours & budget
- Flexible outsourcing

Tactical vs Operational
- Focus on production demand
- Incoming demand inc. arrival patterns are outside operational MIS
- Forecast accuracy via budget accountability (internal demand)
- Resource requirements by skill, geography, team, trade
Resource Planning

Dave George
GM Resourcing Business Connections
## Field Forecast – Create The Demand

### Monthly forecast based on input from our customer reinforced by historic data

-  Build in one off service overlays and projects
-  Upload in excel spreadsheet format by region to create “demand”
Field Forecast –

- Published pictorially here as bar charts monthly or combination of daily & line graphs
- The aim to get an understanding of geography, skill and time
Field People — Create The Supply

- User defined geographic areas – preferred work areas
- Aligned to appointment books
- Priorities for each area configurable for each individual engineer
- Guarantees area coverage for the whole region
Capacity Plan –

- Takes the feed from Field People & Field Forecast to produce provision hours
- We do not have repair appointment books so repair resource capacity removed based on volume forecast
- User configurable routine volumes for known special projects i.e. customer paid for
- Routine work updated from excel spreadsheets
- Purpose to allow the balance of resource 14-90 days out

- Produces feed to Field Reserve
Field Reserve –

- Takes input from Capacity Plan
- Automatically populates appointment books
- Multiple options, can be automatic or manual
Field Reserve –

- User configurable settings
- Controls – Travel time, Minimum Duration, Maximum duration
- Can be bulk changed or individually changed
- Can produce detailed reports
Field Reserve –

- Creates appointment books
- Quick and customisable, takes minutes
- Adding new tasks quick and easy
- Flexible appointment books
Appointing Portal –

- Tool used by sales
- Directly links to Field Reserve
- Provides appointment information in seconds
- Prior to FOS introduction this process took days to complete
- FOS developed to work with the Portal
Performance Measures
Bringing it all together