



TO MOVE FORWARD, PLAN FORWARD



# strategic

## Blue Pumpkin Planner

PRODUCT BRIEF

### ▶ NOW YOU CAN:

- ▶ Plan for a multi-skilled environment—something that is impossible to do with a spreadsheet model
- ▶ Easily assess the costs and benefits of different options before committing to one
- ▶ Develop optimal staffing plans that minimize costs while meeting service goals
- ▶ Quickly develop “what-if” scenarios to assess operational and financial impacts
- ▶ Give executives the information they need to rapidly approve budgets and plans

### PLANNING IN A WORLD OF COMPLEXITY

Planning has never been easy. Especially in the contact center, where things have become more and more complex. Different skills, queues, costs, service levels, handle times—the list goes on. Selecting the right path forward among a myriad of options has never been more difficult.

A lot is riding on the planning effort: the success of your operations, the profitability of your company, the satisfaction of your customers. Proper planning allows you to meet service levels within budget and make informed decisions, enabling your organization to compete at new heights. Unfortunately, a number of different scenarios must first be examined before the right decision can be made.

### VISIBILITY INTO YOUR FUTURE

Blue Pumpkin® Planner is the first long-term strategic resource planning application for multi-skilled contact centers. Planner matches your resources with projected customer demand and corporate objectives. It lets you easily develop different “what-if” scenarios to determine the optimum trade-offs among costs, service levels, revenues, and staffing constraints. And, the patent-pending Planner engine even determines the optimal hiring plan to meet your business goals—something that is impossible to do with a spreadsheet model. With Planner, you can easily increase service levels, eliminate unnecessary costs, prevent downstream crises, and stay ahead of your competition.

### ANSWER TOUGH QUESTIONS EASILY

Planner answers some of the toughest questions about your contact center operations, such as:

- What is the optimal hiring plan for next quarter to meet service goals?
- Do we hire more full-time employees or add overtime hours?
- What is required for us to achieve service levels of 90% of calls in 20 seconds, rather than 80/20?
- What impact does this queue have on revenue and costs?

Answers to questions like these can dramatically improve your operations. As Mark Brannan, contact center operations manager for Timberline Software Corporation, explains, “Planner shows us specific solutions to save money and improve performance. For instance, one scenario showed us that we could save \$1.5 million in staffing costs just by reducing shrinkage a bit and extending phone shifts by 15 minutes.”

*“Planner’s impressive processing capabilities facilitate appropriate strategic decision-making while simultaneously trimming hours from our bid preparation time. This gives us the opportunity to improve the quality of our proposals by running different configurations and analysing staffing requirements appropriately.”*

Mike Pearson  
Resource Manager  
Loop

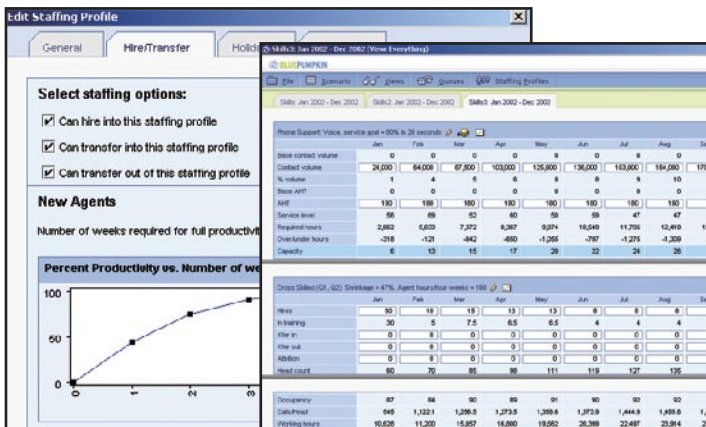


Figure 1: Different staffing profiles can be created and customized to fit your environment.



Figure 2: Planner's easy user interface lets you quickly analyze different scenarios over long time horizons.

Figure 3: Planner lets you graph and compare different options for informed decision-making.

impacts in graphical and tabular form. For each scenario, Planner generates an executive view that clearly communicates advantages, trade-offs, and budgets.

## EASILY EXPORT TO MICROSOFT EXCEL

The scenarios and analyses built with Planner can be exported into a Microsoft Excel workbook, making it easy to share planning information and budgets with decision makers who do not use Planner.

With this knowledge in hand, Timberline knew where to focus, smartly embarked on a performance management strategy that includes Blue Pumpkin Advisor Enterprise, and realized these results, and more.

## FACTOR IN ALL ANGLES

Making decisions based on limited information can be fatal to a business. With Planner, you are ensured that the analysis is comprehensive and covers all the different aspects of the operations. For each specific skill and queue, Planner lets you take into account such variables as:

- Phone, email, fax, chat volume
- Service level
- Cost per contact
- Revenue per contact
- Handle time
- Staff costs
- Overtime
- Full-time, part-time agents
- Blended agents
- Attrition
- Shrinkage
- Occupancy
- Staffing preference
- Learning curve
- Absenteeism
- Capacity
- Burdened costs
- Task-switching agents

Incorporating these elements into your analysis not only increases long-term planning accuracy, but also allows your analysis and decisions to withstand tough scrutiny.

## QUICKLY CREATE "WHAT-IF" SCENARIOS

Understanding the trade-offs among different options is key to getting a full picture of the contact center. With Planner, you can easily conduct "what-if" scenarios analysis. You can vary factors (such as hiring plans, revenue per queue, vacation policies, and new hire ramp-up times), and immediately view performance, productivity, and cost

## AN INTEGRAL PART OF THE WORKFORCE OPTIMIZATION SUITE

Planner is part of the Blue Pumpkin Workforce Optimization Suite, a family of applications and services that facilitates all aspects of contact center operations, both strategic and operational. With Blue Pumpkin, you can schedule and deploy the right number of staff with the right skills to handle the dynamic workload, maximize employee productivity by analyzing staff activity, and assess employee performance for continuous improvement. Strategic Planning with Blue Pumpkin Planner is a critical component of this process, enabling you to develop "what-if" scenarios to determine optimum trade-offs among costs, customer satisfaction and staffing constraints. Planner leverages information from the suite to streamline and expedite your planning process.

## ABOUT BLUE PUMPKIN

Blue Pumpkin provides industry-leading workforce optimization solutions that improve the performance of a customer contact center's most important and valuable asset—its people. Addressing critical business challenges and creating competitive advantage with both innovative technology and best-practices professional services, we help our customers Balance and Optimize™ three critical and often competing priorities: business growth through customer loyalty, employee satisfaction and retention, and operating costs. Blue Pumpkin solutions deliver proven value to more than 1,000 organizations worldwide such as ADP, AT&T, DirectTV, eBay, JetBlue Airways, Toyota, and Visa.



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