

Keith Richard Stapleton

keith@selectplanning.co.uk (www.selectplanning.co.uk)

Telephone: 07884 559303



LinkedIn profile: <https://www.linkedin.com/in/selectkeith/>

I am passionate about the development and use of Resource Planning and Business Intelligence within any business to support the delivery of exceptional high-quality customer service that is sustainable, cost effective and engaging for staff and customers.

My aim is to work with both senior and operational managers enabling them to make the most of their available staff resources before considering more costly options. My ability to explain complex situations in a simple way makes me stand out as a leader who gains support during difficult times of uncertainty and change.

Using my expertise, I have been able to guide businesses within the private and public sectors through major transformation alongside more detailed and specific changes. I have a proven track record of working with and supporting both front and back office businesses.

When working within your business I look to have an immediate impact and add value whilst developing your people's skills to guide you towards self-sufficiency.

Awards and Industry Recognition

2021	SCAS – Covid 19 Response
2020	Planning Forum – Innovation of the Year Award Judge and Case Study Writer
2013 to date	Planning Forum Professional Services Associate & Subject Matter Expert Conference speaker, facilitator, and panel member for industry seminars
2012	Steering Group member for the Professional Planning Forum's Back Office Panel to develop industry standards for back office planning
2012	Steering Group member for the Planning Forum's/Ulster University joint venture to initiate the first UK university degree in Contact Centre Planning
2011	Planning Forum – Accredited as "Professional" Status
2010	Planning Forum – Innovation of the Year Award Finalist & presenter
2004	Planning Forum – Innovation of the Year Award Winner

Personal Skills

- Consultancy - defining customer needs, creating and implementing solutions
- Leadership - motivation and development of others
- Strong communication and presentation skills including conference speaking
- Customer focus – understanding the customer's point of view and what matters to them
- Creativity – sharing ideas and turning them in to reality
- Making things happen – self driven and determined to succeed
- Building and managing relationships - influencing at all levels, within and outside an organisation

Technical Skills

- Volume and workload forecast, long and short-term resource plan modelling
- Management Information creation, content, analysis and use
- Call Centre (front office), Back Office and Field resource planning
- Work Force Management and Productivity monitoring software use and implementation
- Work, time and project management skills, including Prince 2 principles
- Designing, setting up and managing staff development frameworks
- Experienced in the application of Systems Thinking and Continuous Improvement including project-based disciplines
- Proficient in the use of Microsoft Office Excel, Access, Word, PowerPoint and Visio

CERTIFICATES & MEMBERSHIPS

- Accredited member of the Professional Planning Forum Personal Accreditation scheme
 - Aviva Frontline Manager graduate
 - Chartered Insurance Institute Pass: Financial Planning Certificate 1, 2 & 3.
 - Securities Institute Pass: ISA Administration
 - Prince 2: Foundation certificate pass
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CURRENT EMPLOYMENT

Select Planning Limited – Director 01/2013 – Current

I set the company up with my business partner as a result of my passion for developing, sharing and realising the benefits of resource planning. Select Planning supports businesses within both the private and public sectors within the UK and is now in its eighth year of trading.

My Key Achievements:

- Design and delivery of a unique forecasting and resource planning approach for the Covid Pandemic Vaccine roll-out 119 call centre
 - Design of an end to end enterprise planning model for a large housing association
 - Design and build of a new event and resource planning model for a UK based Cancer charity
 - Yorkshire Ambulance IUC and DHU Health Care 111 service, schedule and resource planning reviews and supporting the change implementation
 - Design and implementation of demand forecasting, budgeting, long-term planning and recruitment process/models and team structures including new shift arrangements for extended opening hours for a UK based Cancer charity
 - Review of customer journey and establishment of budget/demand forecasts and capacity planning for the UK arm of a global boiling water system manufacturer and distributor
 - Implementation of workforce planning in a global credit card operation including a large offshore outsourced function
 - Review of end to end workforce planning approach and design of new scheduling approaches for a major UK insurance company
 - Creation and implementation of new call center schedules for one of the big 4 high street banks, delivering a daily call/schedule match of 97% or greater whilst maintaining a satisfactory work/life balance in the UK and offshore
 - Rollout of key time working within the Yorkshire Ambulance 111 emergency call center
 - Review of the Food and Environment Research Agency's food testing facilities' resource planning requirements
 - Conducted industry job interviews, assessments, and recommendations for the Financial Conduct Authority
 - The successful implementation of call center staff schedules for Yorkshire Ambulance Service's 111 service
 - Roll out of service prediction analysis and discussion within the Yorkshire Ambulance Service Senior and Operational management teams
 - Implementation of a long-term resource plan to support a major service structure review within a Police force
 - Training to enable Police staff to continue to support their change program
 - Staff level and schedule review for an online clothing retailer, providing options and recommended actions for change to support their long-term change and budget plans
 - Setting up and running Select Planning Ltd, including marketing, website design and accountancy
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PREVIOUS EMPLOYMENT

South Central Ambulance Service (SCAS) – Covid Pandemic Vaccination Roll Out 12/2020 – 02/2022 (Fixed Term Contract)

Responsible for the demand, capacity and budget planning for the NHS 119 Call centre. Taking responsibility for informing and making key decisions that ensured English citizens invited for Covid vaccinations could have access to trained staff on the 119-helpline to aid them booking their covid vaccinations. Responsibilities extended to Covid domestic and international pass and medical exemption certification during 2021.

My Key Achievements:

- Designing a forecasting and planning approach, and accompanying communication/governance processes for a unique set of circumstances, with extreme volatility and no previous precedents
- Translating high level Government commitments for vaccine roll-out into half hourly call demand, resource requirement and service delivery forecasts for the 119 service
- Fast and flexible responses to invitational demand and Government & Prime Minister announcements (24 hours' notice was common)
- Influencing invitation plans to ensure appropriate response was available from 119 call centre
- Providing "what if" scenarios to both invitation and resourcing teams to aid decision making
- Establishing clear and trusted lines of communication with key stakeholders to ensure operational readiness for each invitation cohort and to manage expectations of senior Programme
- Being 1 step ahead of my requirements and ready with the answers and recommendations
- Fully engaged with all key stakeholders: invitation team, service directors, associates and resource providers
- Underpinning the service's ability to handle more calls in November 21 with 40% less resource and cost than the previous highest call volumes seen in March 21
- Translating complex data sets into compelling narratives for senior stakeholders to make critical decisions relative to:
 - Speed of vaccine roll-out
 - Service capabilities of 119
 - Levels of resourcing in 119 (through outsourced suppliers)
 - Optimisation of 119 budgets to ensure best use of taxpayer money
 - Patient outcomes from using the service
- Providing clear business insight into reasons for patient contact, call outcomes to drive process change to deliver improved patient access and better value for money

Aviva UK General Insurance - Norwich 2005 – 2012

Aviva General Insurance (Norwich Union till 2009) is a 3000+FTE sized organization located at 7+ UK centers, covering the sales, service and claim settlements for building, motor and personal insurances under the Aviva and corporate partner brands.

My roles have included project, technical design and implementation of planning solutions and management of stakeholders and team members within an operational business planning environment.

My Key Achievements:

- Leading member of the team that rolled out resource planning and optimization across the UK Claims centers and Field engineers, providing a solid foundation for recruitment and budget challenge, service delivery and management of year demand fluctuation
- Successful implementation of workforce management and activity tracking tools and supporting processes across the majority of the General Insurance Business, providing business intelligence that enabled me to plan as efficiently as possible and highlight the challenges they faced in advance
- 2010 finalist and presenter for the Professional Planning Forum Innovation awards (Claims manager toolkit), cementing my place in the wider planning industry than just my company
- Design, roll out and promotion of the continued use of the staff development frame work, tied it in with HR training courses and Professional Planning Forum accreditation within the

- operational planning and Management Information teams, improving staff motivation, self-belief and improved plan presentation
- Management of 2 planning teams and development of the team members skills, the aim of turning specialist planners into planning specialists allows individuals to make recommendations based of fewer facts
- Created the operations planning teams intranet sites, providing the ability to share plans and reports, best practice, opportunity for discussion (forums) as good communication is key to sharing the planning outputs
- Visited UK sites to deliver training, thus building relationships as the key to the success of ongoing planning and the challenges it delivers

Norwich Union Life - Norwich 2000 - 2004

Norwich Union Life is a 2500+ FTE sized organization covering the sales, service and settlements for Investments, Pensions and Direct Insurance Sales under the now Aviva and corporate partner brands.

My Key Achievements:

- 2004 winner of the PPF Innovation awards (project Eureka), personally responsible for the management information part, giving me motivation to make further improvements
- Automation, data retention and organization of the management information better met the needs of the business and its managers, waste was reduced making more effort available for the most beneficial reports
- I gained my Chartered Insurance Institute Financial Planning Certificates 1 & 2
- I also gained my Securities Institute pass in ISA Administration and Prince 2 Foundation certificate pass
- Business compliance coordination, reducing effort by getting things compliant though understanding their requirements and managing the relationship between both parties

OTHER EMPLOYMENT

Lloyds TSB – Regulated Financial Advisor 1999 – 2000

The Lloyds TSB banking group was formed in 1998 through the merger of Lloyds bank with TSB. The subsequent acquisition of Scottish Widows gave the banking group a UK wide network of local regions which each contained branches on the high streets of most towns.

My Key Achievements:

- I qualified as a regulated financial advisor through my attendance of the LloydsTsb training courses and passing the required FSA examinations
- I gained my Chartered Insurance Institute Financial Planning Certificates 1 & 2
- Covering 3 local branches within my catchment area through planning my time to where the demand was, also visiting customers' homes at times convenient to themselves
- I supported the merger of two branches to one in my local town, focusing on ensuring the customers felt their needs were being considered

Courtenay Sport – Accounting and customer sales and service 1997 – 1999

Courtenay Sport are a small business offering garage services to the local community and sports tuning packages to Vauxhall owners across the UK and mail order sales across the world. The business employs up to 8 technicians and 3 administration staff.

My Key Achievements:

- Learning the basic processes of business accounting and planning
- Implementation of BACs payment for salaries rather than cash
- Creation of spreadsheets for salary calculation and the production of wage slips
- Reorganization of the service & MOT reminder service leading to increased sales

- Organization and implementation of product sales whilst attending trade shows
- Customer relationship building, leading to repeat business plus company promotion in person at trade shows and through the motoring press
- Organization and management of the mail order business

Norwich Union Life – Pensions administration and systems design 1989 – 1997

Norwich Union Life is based in Norwich and Sheffield and deals with the administration of pension, life protection and investment products.

My Key achievements:

- Teaching and mentoring other staff in all aspects of Personal Pension administration
- Project team member to define process to aid the development of a new company wide computer system with IBM

EDUCATION

- 23 years' experience in the financial industry - **19 years specifically in its planning**
- Norfolk Collage of Arts and Technology, Kings Lynn, Norfolk – **Photography & Technical Design, 3 A levels**
- Litcham high School, Norfolk - **CSE, O Level & GCSE: 12 passes**

ABOUT ME

I am married with a grown up stepson and grandchildren. I enjoy walking/jogging with my wife sometimes combining this with Geocaching which involves the use of GPS to locate hidden treasures (usually in camouflaged containers under hedgerows).

My greatest passion is cars. Often you can find me with dirty hands under the bonnet of my, or a friend's car changing something to make it go a bit quicker, look better or simply keeping running. I am also a member of a model flying club currently flying a radio-controlled helicopter, something requiring coordination, patience and resourcefulness to repair broken parts.