



SELECT PLANNING

Select Planning

Delivering Tailored, Practical Resource Planning Solutions

Resource Planning Expertise at Your Fingertips

How you want it, at a price you'll like

Getting it Done!

www.selectplanning.co.uk



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Why Choose the Select Planning Approach?

Be prepared for what's ahead, leave few surprises and even then, have a solution to hand.

Have absolute clarity and confidence in your ability to meet customer service aspirations and how much it will cost to do so really important to you.

Maximise the effectiveness of the resources available to you through placing them where they are most needed and still giving your people time for rest and development.

Have utmost confidence that when you expect to deliver service you will, and if not, you'll know exactly why and what to do to make the best out of any situation.

Use actionable planning insight, which enables your stakeholders to make the right decisions with confidence and clarity.

Trust a planning process to make your people feel that they are your priority whilst balancing your customer and commercial imperatives.

Does most resource planning consultancy feel too expensive, too theoretical, too complex and out of reach? We know that every business is different and does not easily fit into a set of theoretically defined standards. With that in mind, we have designed a set of short, focused, consultancy review modules that you can select from to target your specific needs.

Our very affordable, fast paced consultancy support lets you focus on what will deliver the best results for you. Targeted where you need them most, these modules will provide practical and tailored solutions to support genuine improvement that is right for you, now and in the future.

**Simple, affordable, targeted, and modular
Resource Planning Consultancy that goes beyond theory
Giving you choice, expertise, fresh thinking, and practical help**



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Select Planning Review Modules – Summary View

Module	Purpose
1. Maximising the Value of Your Planning Function	This is ideal for organisations who simply feel that their planning processes are not working well enough for them or have limited existing planning functions.
2. Forecasting Demand, Workload and Staffing	This is ideal for organisations who need help in improving the quality of their planning; specifically in relation to their forecasting of demand and staffing requirements.
3. Deployment of People to Match Demand	This is ideal for organisations where matching staffing to demand is a real challenge.
4. Tactical Planning & Delivering in Real-Time	This is ideal for organisations who feel their planning and deployment is strong but see things fall apart on the day itself.
5. Insight, Learning & Continuous Improvement	This is ideal for organisations who are lost in data and numbers and are devoid of actionable insight.
6. Planning for a Better Employee Experience	This is ideal for organisations who recognise that they need to put their people and their wellbeing at the forefront of their planning process.



SELECT PLANNING

Select Planning – Summary of our Review Module Approach

How Do They Work?	What Do I Get?	What Does It Cost?*
Choose the module(s) you need based on your perceived or known challenges We will discuss this with you to ensure you get the right module(s) for you Data requirements are agreed upfront and must be provided at the start of the project People to be interviewed will be agreed at the start of the project Consultancy time delivered virtually across consecutive working days	• 5 days consultancy time per module • Agreed key personnel and stakeholders are interviewed • Agreed key data items are reviewed • Full written report of findings • Clear set of recommendations and opportunities, prioritised into a suggested action plan • 1 hour, virtual, presentation of findings and action plan to agreed stakeholder group – to be delivered within 1 week of the provision of the written report • 1 hour follow up, virtual, meeting 1 month later to reflect on progress/agree any next steps	Exact pricing is dependent on: • How many functions/operational areas you wish to cover. • How many modules you purchase together (discounts available for group purchases)



Maximise the Value of Your Planning Function

Why is this the right module for you?	What does the module cover?	What opportunities will this present?
This is ideal for organisations who simply feel that their planning processes are not working well enough for them or have limited existing planning functions. Perhaps you are creating resource plans that are getting no traction with your stakeholders and drive limited actions or decisions. You may simply not trust the outputs from the planning processes and the expectations they create. It may feel as though the key components of planning are in place but are disparate and disjointed and create multiple versions of the truth. Are you swimming in data but drowning because of no insight? You may feel that your planning does not adequately reflect your organisation – its strategy, its change programmes, its cost challenges, its customer and people aspirations? You may simply feel under-prepared for what's ahead	This module will review the appropriateness, relevance and quality of existing planning cycle: • Stakeholder input, engagement and influence • Quality of planning insight to support consistent understanding and confident decision making for both the short and long term • Levels of preparedness for the future using planning insight • How planning enables the business to respond quickly and effectively to changing dynamics • How planning is supporting employee engagement with flexible and easy to use planning processes • The effectiveness of planning in supporting learning and improvement of future planning and delivery	Be prepared for what's ahead, leave few surprises and even then, have a solution to hand. Drive the required actions or decisions to make your business successful. Know that stakeholders trust the outputs from the planning processes and the expectations they create. Make data valuable through delivering insight that others understand and use. Limit the data you have and use the saved time to drive better insight and actions. Have your planning reflect your organisation – its strategy, its change programmes, its cost challenges, its customer and people aspirations, be the “go to” for decision making.



Forecasting Demand, Workload & Staffing

Why is this the right module for you?	What does the module cover?	What opportunities will this present?
This is ideal for organisations who need help in improving the quality of their planning; specifically in relation to their forecasting of demand and staffing requirements. You may be concerned that you cannot meet your customer service aspirations, or you may feel that your staff costs are too high. Are you struggling to understand what you need to recruit and when or can't get to grips with the impacts of attrition? Do major change projects continually throw you off course, leaving you exposed to unforeseen impacts? Perhaps your annual budget process a real headache to get to grip with?	This module will review your forecasting for the year ahead and for the longer term – the suitability of approach, methodology, and models: • Demand and workload • Staff requirement • Staff employed • Staff availability & non-availability • Staff utilisation • Staff costs • Service delivery • Assumption review processes • Engagement with relevant stakeholders • Reliability, relevance and comprehensiveness of inputs • Alignment with recruitment and training requirements • Alignment with strategic & financial objectives & change • Alignment with budget process • Quality of insight provided by key outputs • Governance, change control and responsiveness of plans	Clarity and confidence in your ability to meet customer service aspirations and how much it will cost to do so. Clear recruitment plans that mitigate attrition and realise growth aspirations that can be shared to aid their delivery Being able to influence change through understanding and incorporation to your future operational plans, no longer being an afterthought that must deliver Being part of the annual budget process so at any point in time a clear financial plan is understood in monetary value and impact to customer service and staff delivering it



Deployment of People to Match Demand

Why is this the right module for you?

This is ideal for organisations where matching staffing to demand is a real challenge.

You may see significant gaps in coverage at different times of the day/week or month.

Are you “wasting” resources and suffering low utilisation rates or struggling to deploy key rest or development time?

Or you could feel that the shifts offered to staff simply do not meet their needs for a fair work/life balance.

Does the impact of home and hybrid working give you concerns?

Is your scheduling process failing to provide realistic expectations of what you can deliver for customers?

What does the module cover?

This module will review your approach to deploying your people - the coverage it gives you, and the insight and expectations it creates:

- Forecasting demand & workload at interval levels
- Clarity and appropriateness of shift design principles
- Allowance for staff non-availability within schedules
- Quality and consistency of staff coverage
- Service delivery predictions
- Staff utilisation predictions
- Schedule efficiency predictions
- Quality of insight provided by key outputs
- Handover to real-time – quality of plan and insight provided
- Assumption review process
- Suitability of approach, methodology and models
- Engagement with relevant stakeholders
- Reliability, relevance and comprehensiveness of inputs
- Governance, change control and short-notice change processes

What opportunities will this present?

Maximise the effectiveness of the resources available to you through placing them where they are most needed and still giving them time for rest and development

Remove any significant gaps in coverage at different times of the day/week or month.

Please your staff by offering them shifts that suit them as well as your customers.

Successfully and seamlessly introduce new ways of working such as hybrid or home working.

Ensure your scheduling process is not the cause of failure to provide realistic expectations of what you can deliver for customers?



Tactical Planning and Delivering in Real-Time

Why is this the right module for you?	What does the module cover?	What opportunities will this present?
This is ideal for organisations who feel their planning and deployment is strong but see things fall apart on the day itself. Is your tactical plan creating false expectations? Are you always mindlessly chasing an unachievable service goal? When things don't go to plan, are you struggling without consistent, considered contingency options? Is your operation going solo and ignoring the insight you've provided? Does your real-time function have a reputation for always saying "no" leaving stakeholders frustrated and confused? Are you lacking appropriate communication & insight to understand performance and rationale on the day and to learn from successes as well as failures?	This module will review how you create and manage against a tactical real-time plan, manage exceptions and use insight to learn from what happens • Relevance and reliability of the plan for the day ahead • Clarity of expectations, potential issues and risks and potential mitigating actions • Communication, engagement and stakeholder buy-in for today's plan • Contingency options for further mitigations • Approach to on-the-day management of the plan • Quality and appropriateness of real-time data and business insight • Sticking to the plan when it is right • Application of pre-agreed contingency options • Ability to re-forecast and re-set expectations • Communication of progress and need for action/actions taken • Tracking and collation of what works and what doesn't to capture learning • Quality of insight provided by key outputs • Governance & change control and short notice change processes • Review processes	Have utmost confidence when you expect to deliver service you will, and if not, you'll know exactly why and what to do to make the best out of any situation. When required known and trusted contingency plans are at hand, everyone will know what they need to do. The operation will want to follow the insight you've provided, no more discussions over who knew best. Give your real-time function the chance to say "yes" leaving stakeholders satisfied and informed. Learning from what went well as well as what didn't, removing the blame culture and sharing success and methods.



Insight, Learning & Continuous Improvement

Why is this the right module for you?	What does the module cover?	What opportunities will this present?
This is ideal for organisations who are lost in data and numbers and are devoid of actionable insight. Are your planning processes churning out an endless stream of information that means little to their stakeholders? Do your stakeholders revert to creating their own reports to satisfy their need for actionable insight? Do your planning function's stakeholders struggle to understand the planning process and/or simply don't use the outputs provided? Do your planning function's outputs simply not meet the needs of your business? Are you frustrated that the same failures happen time and again with no apparent learning taking place?	This module will review your approach to the creation, sharing, and use of actionable insight to aid learning and continuous improvement • Balance of numbers, analysis and insight across key reports for stakeholders • Assurance of single version of the truth in all reporting • Understanding of key stakeholders and how planning insight is actually used • Sharing mechanisms and meeting's governance • Use of insight to drive action and follow up • How learning is captured and applied	Be the “go to” for reports and actionable insight, enabling the stakeholders to make the right decisions with confidence and clarity. Providing your stakeholders with valuable information that supports them to deliver their objectives. Clarity in what you do and how you do it for both you and your stakeholders, making you the trusted support function. Remove wasted time spent on reports and analysis that does not add value to those who receive it, instead utilise the save time for value adding learning, improvements and innovation.



Planning for a Better Employee Experience

Why is this the right module for you?	What does the module cover?	What opportunities will this present?
This is ideal for organisations who recognise that they need to put their people and their wellbeing at the forefront of their planning process. Do you have a clear workforce strategy that is appropriate in today's climate? Are you planning processes fully aligned with your workforce strategy or are they at odds? Are your people frustrated with “boom & bust” workloads, and not able to deliver great outcomes for customers? Is their discontent at the ease with which people can get time-off or use flexible in-work options? Is your recruitment & training process hamstrung by inadequate planning insight? Are your people fed up with not being able to spend time on their development or seeing allocated time cancelled?	This module will review how your planning process puts your people at its core in order to deliver for the business • Existing workforce strategy; its clarity, relevance and understanding of stakeholders • How resource planning is aligned to the workforce strategy • Alignment of recruitment and skilling requirements/processes with long-term planning processes • How planning approaches are enabling people to deliver quality outcomes for customer • How planning approaches are delivering a great in-work experience (development time, rest, staying in-touch etc) • Time-off processes – ease of use and application, perceived fairness and appropriateness • In-work options that give people choice and flexibility • How planning is delivering the smoothest possible workloads for people • Shift design principles that balance the needs of people and customers	A planning process which makes people feel that they are your priority whilst balancing your customer and commercial imperatives Have a workforce strategy that delivers for your staff so they can deliver outstanding results for the customer and business. Give people achievable and consistent workloads that enable them to deliver outstanding customer outcomes whilst nurturing and developing themselves. Be able to stay “yes” to annual leave requests and flexible working options, with confidence that no one else will suffer as a result. A recruitment and training process that delivers the right staff when needed because it's fully joined up to your plans.



Select Planning – Delivering Your Recommended Action Plan from the Modules

What Is It?	How Does It Work?	What Does It Cost?
When you need support to deliver the action plan • Delivery of agreed action plan • Additional expertise to implement solutions • Speed up deliveries • Management/governance of action plan to minimise delay/failure	• Consultancy time delivered virtually & in person (as agreed) • Agreement of actions/deliverables & timescales • Responsibilities split between us and you (as agreed) • Management of deliverable to timescales • Regular progress updates • Sign-off of deliverables and work completion • 1 hour follow up meeting 3 months after completion of work to reflect on progress and benefit realisation	Subject to agreement, based on: • Our actions/time required to meet deliverables • Our responsibilities to manage the deliverables and timescales • Number of days consultancy time or total delivery price
When can deliver the action plan yourself BUT want help to keep on track and validate ideas and progress: • Advice and a friendly conscience to help keep on track with your project • Safe environment to discuss ideas and validate new thinking • Independent and objective perspective on your project's progress	• Deliverables identified, scoped and agreed by you with a project plan in place • Consultancy time delivered virtually • Responsibility for project delivery sits with you • Mentoring and consultancy support through regular touchpoints that will help: • Focus on the key, intended outcomes and benefits • Stay on track with delivering to time & budget • Validate new ideas	Subject to agreement, based on: • Number of months support • Maximum of 2 touchpoints per month (1/2 day each) • (Recommended touchpoints either monthly or bi-monthly)



Select Planning – Annual Review of Progress

When Does It Work?	What Is it?
When you have used our standard module(s) and want to review your progress against the action plan • Every 12 months • Shorter time periods are subject to agreement	Annual overview of your progress against the action plan you agreed as part of one (or more) of the standard modules • Highlighting current status, key issues and areas for development
How Does It Work?	What Does It Cost for an Annual Review?*
• Virtual review of your action plan and progress against it • Based on focused interviews with key personnel and stakeholders (max of 3 days depending on how many modules were used) • Report on current status against the action plan and any remedial actions needed • Virtual feedback session to discuss the report	Exact pricing is dependent on: • How many functions/operational areas you wish to cover. • How many modules you purchase together (discounts available for group purchases)



If you have a challenge that does not fit our standard modules – it may feel too large, complex or encompass other aspects – we still have bespoke options which can help:

- Diagnose your challenges and define an action plan
- Speed up your project delivery
- Provide additional expertise and fresh, independent thinking to create solutions or influence them
- Objectively validate your thinking and results
- Support management and/or governance of your project delivery to minimise delay or failure

Contact Us Today

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