|  |  |
| --- | --- |
| Service and job specific context statement | |
| **Directorate:** | Central Services |
| **Service:** | Technology and Change |
| **Post title:** | Forecasting and Planning Manager |
| **Grade:** | N |
| **Responsible to:** | Head of Customer Services |
| **Staff managed:** | Manages a team of support roles |
| **Date of issue:** | June 2020 |
| **Job family:** | **OS - Operational Support** |

|  |
| --- |
| Job context |
| This post is based within Technology and Change; this service provides ICT, digital, change management and customer services which enable the organisation and its partners to achieve their outcomes and continually improve the services we deliver to the people of North Yorkshire. The current user base includes approximately 6500 NYCC staff and 612,000 citizens of North Yorkshire.  T&C support the council to better manage demand and customer experience through effective channel management and customer responsive service design, including increasing the availability and use of digital channels. The council is committed to ensuring modern working environments and flexible workspaces. T&C play a key role in maximising the effective use of digital office technologies, productivity software, digital communications, including collaborative technologies, and digital information systems.  The customer service centre provides a “corporate front door” internal, external, corporate and commercial customers the ability to access services.  The customer service centre has a number of teams offering complex services across a number of customer contact channels. The aim of the customer service centre is to deliver services across all contact channels to support customers with more complex needs while promoting NYCC’s on-line services aimed at reducing demand for simple enquiries.  This role will be responsible for the effective forecasting and planning of resources across all customer contact channels and the delivery of all services levels. |
| Job specifics |
| This role will be based in the corporate customer service centre. The Centre is responsible for customer service, customer support, channel migration and on-going customer relationship management via telephone, web chat, social media and an on-line portal for both internal, external, corporate and commercial customers  The overall job purpose is to determine resource requirements for all teams dealing with internal, external, corporate and commercial customer contacts, ensuring that shifts are aligned to customer demand, meeting all service standards whilst forecasting and modelling future demand requirements and customer behaviour change across multiple inbound channels in a complex, rapidly changing, customer service environment.  This role will utilise resources including staffing and technology to deliver overall performance at the single front door to achieve overall performance in the most cost effective way.  The post holder will be responsible for delivering a balance between optimisation of performance and flexibility, to ensure on-going well-being of staff working in the centre.  The Forecasting and Planning Manager will also manage the Intraday Manager who will manage the customer service centre demand on a day to day basis to ensure that the best performance is achieved for our customers as well as providing reporting on individual, service, team and centre performance.  The planning functions allow the centre to respond to changes and retain performance for our customers as well as providing a forecasting and modelling function to enable the organisation to develop its long term strategy for customer demand management using data to drive change and improvement to the customer experience. |

|  |
| --- |
| Structure |

|  |  |
| --- | --- |
| Job Description | |
|  |  |

|  |  |
| --- | --- |
| Job purpose | The core focus of this job is to direct the operations in the customer service centre to deliver service in line with service levels. The post holder will do this by using all available data and tools to effectively model and forecast demand across all customer channels, understanding the course of changes in trends. Analyse performance and make recommendations for improvement. |
| Operational management | * To direct operations in the centre on a day to day basis to ensure that service levels are all achieved. * Create a plan for the allocation of all tasks across all services to individuals in the centre in line with real-time customer demand. The plan will consider task deadlines, SLA agreements with service areas, schedule rules, and any staffing issues relevant at the time * To create and maintain the long term plan for the centre which should include training, recruitment, changes to service and implementation of new services. * To deliver the strategy to maximise flexible working for employees while optimising performance. * The analysis of demand trends across services and channels, to reforecast any variance back into the plan and to document mitigating action taken, and comments. * To develop and maintain processes to ensure optimal and consistent performance of the team at all times to ensure the best outcomes for our customers * Ensure the creation of data to drive advisor performance process including comments and statistical trends from day to day operations and trends over time * Oversee the production of individual, team, service and channel performance reporting to ensure that the team leader function can effectively manage individual and team performance and the customer demand channel managers can respond appropriately to changing customer behaviour. * Work with the T & C teams to improve the use of technology to effect improved flexibility and efficiency in the customer service centre and maintain the centre’s technology strategy and roadmap. * Create and deliver an on-going resource plan including forecast service levels using workforce management tools. The plan should be continually analysed against actual outcomes and amended in line with learning and unplanned events. * Feedback where improvements in process need to be made to a service in line with customer comments and feedback. * Work with the Head of customer service and the customer demand channel manager function to create strategies to effect customer behaviour change on each service and channel using customer service centre resources. |
| Communications | * Communicate with the teams in the centre using the knowledge base system to ensure that they are aware of events as they happen to enable them to provide the accurate and up to date information to customers * Manage communications in the customer service centre to ensure that all teams are up to date at all times ensuring that information given to customer is current. * Ensure that the customer demand channel managers are aware of any changes in demand patterns and customer behaviour across all channels so that they can respond to that change in a timely way to ensure high standards of performance * Manage risks to customer service and service levels identified through analysis of data and real time events in the centre. * Influence change to direction of centre by making recommendations for improvements based on observations and analysis of data. * Deal with customer escalations from the team in the absence of the team leader * Ensure the delivery of monthly, weekly and daily reports on the performance of the centre |
| Partnership / corporate working | * Manage the service continuity plan * Work with partners to co-product and maintain a service continuity plan focused on maintaining services to customers across organisations using technology and resources. |
| Resource management | * Line management and development of the resource planning function in the customer service centre to ensure clear succession planning. * Create and maintain the short and long term resource plans for the customer services centre including shift patterns, annual leave, unplanned leave, training and recruitment. * Manage the call flows and messaging in the centre using the client software and intelligent queuing system to ensure that customer demand is managed in line with agent skill sets. |
| Systems and information | * Using the work force management tool and other data tools create workforce plans and reporting for the customer service centre. * Analyse data from customer service systems to identify and manage risks to service, reasons for changes in demand and behaviour and performance information. * Manage call flows and messaging using the customer service centre client system and intelligent queuing. |
| Strategic management | * Implement changes to process or protocol to drive performance improvement. * Create and manage the plan for long term and short term resource plan in the customer service centre. * Deliver the strategy for maximising flexibility and optimising performance |

|  |  |
| --- | --- |
| Person Specification | |
| Essential upon appointment | **Desirable on appointment** |
| Knowledge   * In depth knowledge of current industry guidance and legislation with respect to operations in a contact centre environment. * Excellent theoretical knowledge of the resource planning cycle. * Knowledge relating to resource planning in a multi-channel customer service environment including best practice models. * Knowledge of contact centre technology * Knowledge of contact centre KPI | * Knowledge of local government services * Knowledge relating to project management best practise |
| Experience   * Strategic management in a complex multi-channel contact center environment. * Experience in driving performance through effective planning and forecasting in a real time operational environment * Proven and effective experience of the management of resources in a changing organisational environment * Significant experience in the creation, analysis and presentation of performance reporting including presentation and translation of data across multiple datasets * Experience of using workforce planning software * Experience of developing a resource planning function | * Experience in dealing with challenging timeframes and targets * Experience of ingixo Workforce Management. * Advance skill in use of Microsoft excel. * Experience of utilising a multi-channel ACD systems |
| Occupational Skills   * Change management * Operational and line management * Influencing and negotiating skills * Good interpersonal skills. * The ability to work with management teams to ensure clear goals regarding service level agreement * Strategic thinker and tactical implementer |  |
| Professional Qualifications/Training/Registrations required by law, and/or essential for the performance of the role   * Management qualification or equivalent experience as an essential qualification requirement. | * Project management * ITIL Service Management Foundation * Level 3 literacy and numeracy |
| Other Requirements   * Ability to travel across the County * Ability to attend meetings outside of normal business hours * Ability to work flexibly in line with customer demand |  |
| Behaviours | [Link](http://www.northyorks.gov.uk/article/23524/What-you-should-know-before-applying-for-a-job) |

NB – Assessment criteria for recruitment will be notified separately.  
Optional - Statement for recruitment purposes: You should use this information to make the best of your application by identifying some specific pieces of work you may have undertaken in any of these areas. You will be tested in some or all of the skill specific areas over the course of the selection process.