



STAFFPRO

VERSION 2

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ELEMENTS

FORECASTING

SCHEDULING

ENTERPRISE REPORTING

TELLER PERFORMANCE MEASUREMENT

MANAGING TELLER RESOURCES

Teller operations are a primary point of customer contact and a personnel intensive function, making them one of the most important and costly functions for financial institutions. This browser-based tool is used to optimize your teller resource, reduce costs and provide greater access to information throughout the organization. StaffPro conveys an accurate picture of current teller productivity and provides tools to deploy that resource in a more effective way.

StaffPro is designed to fit easily into your existing operational and IT environment, using existing personnel and assets, and begin delivering results quickly.

StaffPro differs from most other teller staffing products by employing a heuristic algorithm instead of statistical modeling to forecast staff. Adoption of a heuristic algorithm produces staff projections from weighted transaction volumes using formulas that capture and express your knowledge and experience of your operation. This strategy produces effective results quickly, without initial transaction



timings, work process studies or constant input of staff activity.

Once both central management and branch operations agree the model is a reasonable reflection of reality in your organization, there is no longer an argument about what needs to be done. The level of benefit achieved and its sustainability over time depend in large measure on how people feel about it and StaffPro makes productivity improvement a bottom up effort.

Why StaffPro?

- Cost savings, reduction or reallocation of staff
- Simple, fast implementation
- Low ongoing maintenance effort
- Comprehensive, targeted reporting
- Effective results quickly

THE DIFFERENCE IS IN.....

Forecasting Model

- Produces staff projections from weighted transaction volumes using formulas that capture and express your operation.

Teller Performance Measurement

- A sophisticated system designed to measure and improve the quality of teller operations. For the first time

tellers and supervisors will have a standard to aim at.

Enterprise Reporting

- An Enterprise reporting and security module that serves as the reporting engine for StaffPro, but can produce, distribute and manage report requirements across all departments and applications.

FORECASTING

Forecasting of teller staff is achieved by applying a staffing formula to weighted teller transaction activity. Formulas produce a staff projections based on the following scale: 1, 1+, 2-, 2, 2+, 3-, 3, 3+ etc. instead of a decimal. A + symbol indicates the work is heavy for the number of tellers, but still within the target. The – symbol indicates the

volume is on the low end of what a given number of tellers should do.

Bank branches, the staff, the transactions and the customers are dynamic entities that interact in ways not well captured in a purely quantitative model.

Formulas project staff based on weighted transaction counts for each

time period. Transaction weighting has two components: transaction type and cash volume. Weighting transactions is optional, but provides an opportunity to finely tune the formulas to reflect the culture and characteristics of your bank.



SCHEDULING

Scheduling is provided through a combination of automated and management tools. The system maintains three schedules for each branch by day of the week: Base, System and Active. Each schedule tracks time by half hour allocated by a set of work categories (teller, non-teller, lunch, etc.). Base schedules

are simply the hours the branch is open. System schedules are recalculated automatically each month. Active schedules are initially based on System schedules but are modified, expanded and maintained by management.

Every month a new Baseline profile is generated based on the prior three

months activity. StaffPro then automatically creates a new System schedule by analyzing each hour of each day of the week, and scheduling the tellers who did the most transactions in that hour until the Baseline requirement is met.

ENTERPRISE REPORTING

StaffPro is unique because the report engine is designed so it can serve as the report engine for any application, product, department or entity in the Enterprise. This is done effectively via a number of critical features.

Security – Controls who can access which reports, and what scope of data they can request for a given report.

Organization – Reports are organized into groups (e.g. Loans, Auditing, etc.) controlled through flexible menus and tied to security.

Flexibility – Criteria built into the report definitions (dates, branches, depart-

ments, personnel, prompted fields, etc.) can be specified by the requestor.

Data Management – Supports distributed report generation so that the data being reported on stays where it is. You do not have to move data to a central database or create snapshots, even if the source is in another server, city or state. The report is created local to the data and only the finished report moved across the network.

StaffPro reports are delivered as a pre-defined set of reports. They can be customized and managed in many ways.

- Define what reports are in the system.

- Organize the reports into related groups and associate the groups under menus.
- Control what security groups can access what menus and reports
- Create unlimited views of branches, departments, personnel, accounts, etc. and access these views in a variety of ways as appropriate for each report.
- Control how much of a view a user can see when accessing a report.
- Automatically create and manage individual lists of requested reports kept for a defined retention period.

TELLER PERFORMANCE MEASUREMENT

Teller Performance Measurement (TPM) is a module that produces a quantitative score to measure teller performance. Scores are normalized so that tellers across an institution can be fairly compared between full-time and part-time tellers, small and large branches. The module

maintains history so that supervisors can easily view a teller's performance over time. There are TPM reports to rank tellers across an area or the entire bank, and reports that compare teller performance between branches to evaluate the quality of supervisory personnel.

TPM measures three aspects of teller activity:

- Aggregate amount of overages plus shortages
- Frequency of outages
- Transaction volume (average transactions/hour) compared with a peer group

"The use of StaffPro gives us much confidence in our teller scheduling. Management has seen its scheduling accuracy and now responds to a staffing need quickly. Confidence in the schedule, as well as confidence that management will respond, has resulted in new levels of satisfaction and cooperation across our organization."

Joyce Kilpatrick-Jordan
First Citizens Bank
of North Carolina