

P&O Plan Output Review Process Standardization

Part 1 - Overview

During WK9 2025, PPT held a summit in Nashville to observe the end to end planner cadence for a full week. The ultimate goal of the week was to identify inefficiencies in the processes, data science, or technical tools. Below showcases some current pain points elaborated:

- 40% maintain multiple Excel files and offline tracking systems
- 15-20 manual interventions daily across planning tools
- Inconsistent review processes (particularly in Plan Output review) across regions
- One planner needs 25+ minutes for horizon-wide reviews due to system limitations
- Planners maintain separate tracking systems to compensate for system limitations

(Source for above: [Planner Experience Narrative](#) shared by Katelyn Griesmer)

Of all the observations, **Inconsistent & Manual Output Review Process** stands out as an opportunity for a standardized mental model and review format. This document focuses on that and provides a solution and roadmap that aims to complete by 2025 mid-May.

Part 2 - Current State

The weekly plan output review process varies across **12 Sub Super Region calls, 69 Region calls and 2 Super Region calls** ([A. Case Study: Texazona](#)). This lack of standardization creates inefficiencies, with review times varying by 30-90 minutes across regions. This also has stifled the ability of planners to cover different regions due to different presentation formats and preparation approaches. The variation extends to meeting structures, where some regions require full stakeholder attendance (Operations, PxT, Regional Managers, and ACES) while others operate with minimal participation, leading to inconsistent decision-making processes. Apart from the inconsistency, the process is technically challenging and time consuming due to manual data manipulations ([A. Case Study: Texazona](#)). The following table details some potential business impacts could be achieved thru standardization, which will be explained in [Part 4 - Proposed Solution](#).

Part 3 - Business Impact

Impact	Per Week	Explanation
# of Calls Standardizes	<ul style="list-style-type: none">• 12 Sub Super Region calls• (Up to) 69 Region calls• 2 Super Region calls	Happens all day Wed - Fri at varying times
# of Review Time Reduces	(Up to) 60 mins per call	Current review times varying from 30-90 minutes
# of Manual Pull Eliminates	38 pulls per (Sub Super)Region	Estimate based on A. Case Study: Texazona , managers/planners usually do 8 manual pulls from 3 dashboards and 2 excel data sources, three times a day from Wed to Thu, and once on Fri
# of Manual Work Hours Saves	≈ 2 Hours per (Sub Super)Region	Each time the above process takes minimum ~15 mins to consolidate and flag
% of Manual Error Reduces	≈ 10%	Wrong filters applied when pull from dashboards; Copy & Paste Errors; Excel calculation errors
% of Unproductive Hours Reduces	≈ 10%	Difficult coverage across different regions

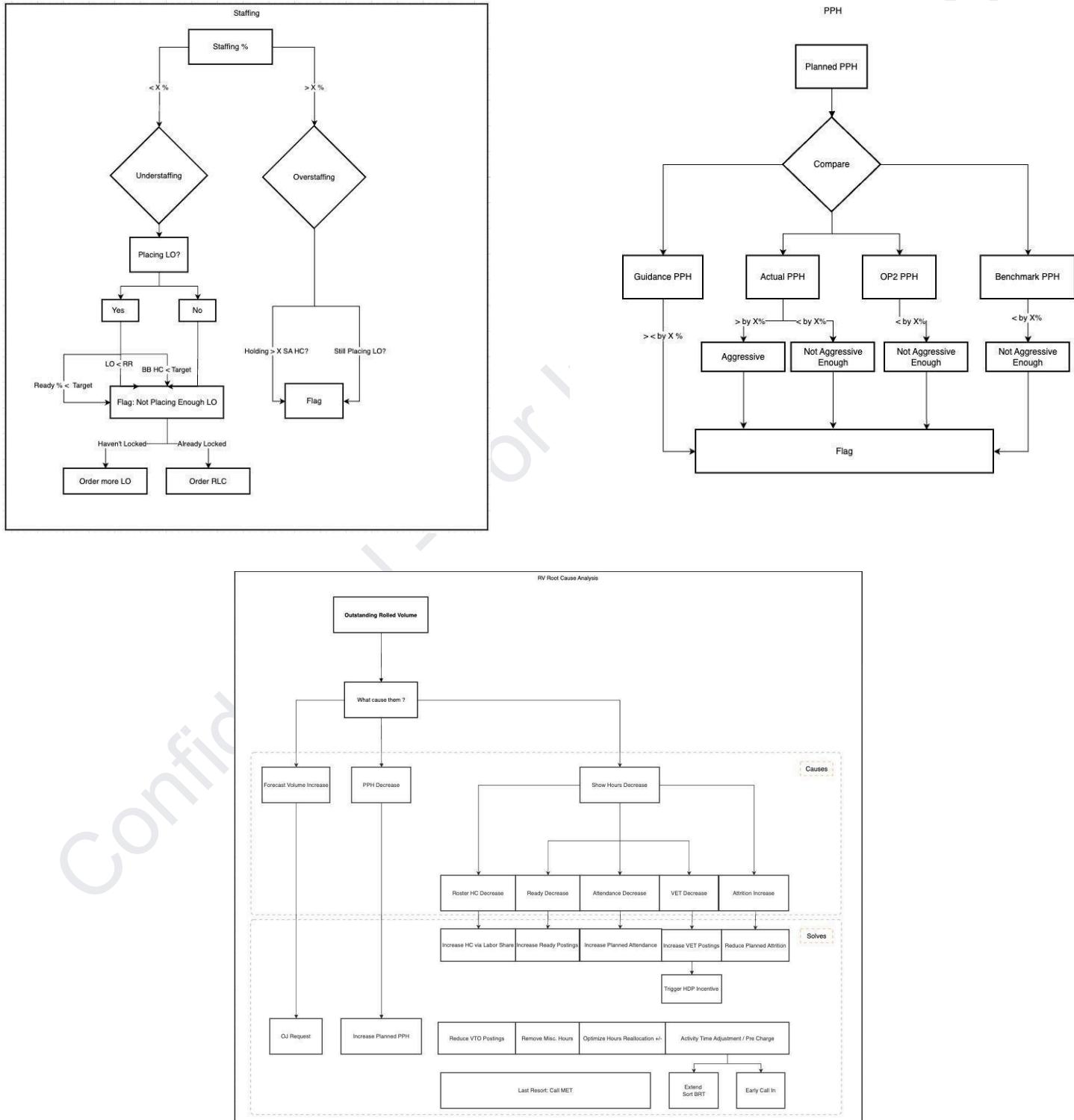
Eventually contribute to the final goal of expand planner to site ratio from 1:7 to 1:20 (Source: [Planner Experience Narrative](#))

Part 4 - Proposed Solution

This section starts with a standardized mental model that can be followed in different calls, then discuss the standardized tech solution design in details.

Standardized Mental Model

- Do we have PPH risks? If yes, what caused them and how can we solve them efficiently?
- Do we have Staffing risks? If yes, what caused them and how can we solve them efficiently?
- Do we have Rolled Volume risks? If yes, what caused them and how can we solve them efficiently?



Standardized Review Format

Proposing a new tab in [Labor Planning Review Dashboard](#) as the one-stop-shop for managers and planners to use during all levels of calls. The below describe specific data dimensions, metrics and visuals.

Data Dimensions				
Source Type	Granularity	Date Type	Horizon	Plan Type
Plan	Super Region	Weekly	Future 13 Weeks (Plan & Guidance)	Latest Weekly
Actual	Sub Super Region		Past 8 Weeks (Actual)	* Custom Tags
Guidance	Region			
OP2 (Offline)	Station			
Benchmark (Offline)				
WFS Data (Offline)				

Data Metrics			
Volume	PPH	Staffing %	Hours
Planned Volume	Planned Undiluted PPH	Building Staffing %	Planned Needed Hours
Actual Volume	Actual Undiluted PPH	Tier 1 Staffing %	Guidance Needed Hours
Rolled Volume	Guidance Undiluted PPH	PS Staffing %	Planned Norm Hours
Planned/Rolled Volume WoW% Change	OP2 PPH	Sort Staffing %	Actual Hours
	Benchmark PPH	SA HC (Fixed/Flex)	
	Guidance PPH Deviation	Labor Orders	
	Planned PPH Deviation	Lock Week	
	OP2 PPH Deviation	Run Rates	
	PvG %	BB HC	
	PvA %	BB HC Target	
	PvOP2 %		
	PvBM %		

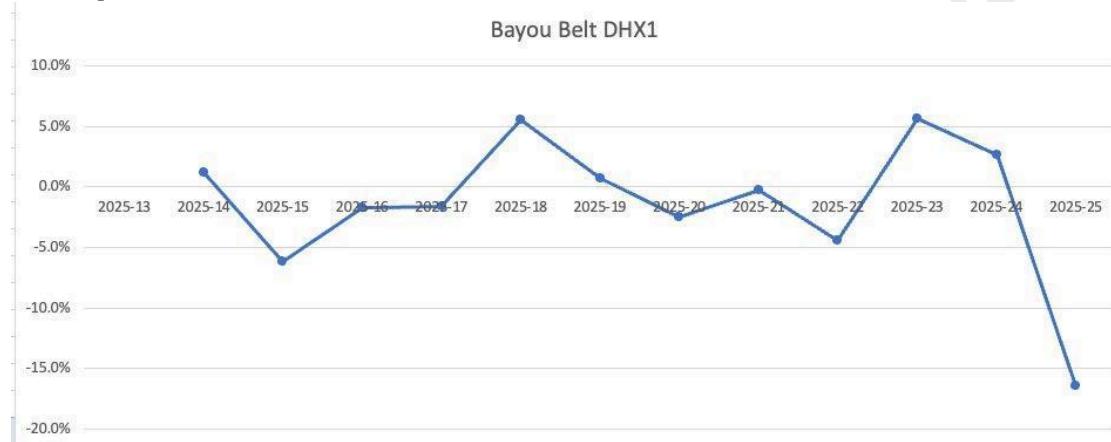
Data Visuals						
Sheet Name	View Name	Insights	* Cadence	Note	P&O POC	ECD
Plan Output Review	↳ View 1: [Overview] PPH	PPH Risk overview		Filterable: Super/Sub-Super/Region	@Zachary Reeh	5/9/2025
	↳ View 2: [Overview] Volume Trend	Volume WoW %		Filterable: Super/Sub-Super/Region		
	↳ View 3: [Deep Dive] PPH	PPH risk analysis by looking at PPH of Planned, Actual, Guidance, OP2, Benchmark, and % comparison between each other, and discuss how to solve		Extends to Station level, with 9 PPH tables horizontal lays out that reads left to right		
	↳ View 4: [Deep Dive] Staffing & LO	Staffing risk analysis by looking at Staffing %, HC and LO together and discuss how to solve	30 Mins Incremental	Extends to Station level, include both views side by side in 1 table. Have + and - to be able open and close to support presentation as needed		
	↳ View 5: [Deep Dive] Volume	Volume risk analysis by looking at Volume with its WoW changes and discuss how to solve		Extends to Station level		

Mockups

View 1: [Overview] PPH

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Labor Start Week	Planned Volume	Actual Volume	Guidance Needed Hours	Planned Needed Hours	Planned Norm Hours	Actual Hours	Guidance PPH Undiluted	Planned PPH Undiluted	Actual PPH Undiluted	OP2 PPH	Guidance PPH Deviation Undiluted	Planned PPH Deviation Undiluted	OP2 Deviation
1													
2	2025-10	131.1M	123.3M	2,124,273	2,135,427	2,008,217	2,064,402	62.3	62.0	60.1	-3.4%	-3.1%	
3	2025-11	129.1M	122.9M	2,095,149	2,104,284	2,001,901	2,031,039	62.1	62.0	60.8	-2.1%	-1.8%	
4	2025-12	125.8M	122.7M	2,030,115	2,040,519	1,990,026	2,008,745	62.5	62.2	61.5	-1.6%	-1.3%	
5	2025-13	131.6M	53.6M	2,097,884	2,118,141	862,899	868,077	63.2	62.7	62.2	-1.6%	-0.9%	
6	2025-14	136.1M	0.0	2,124,878	2,134,853	0	0	64.5	64.3	64.3			
7	2025-15	130.1M	0.0	2,035,514	2,032,466	0	0	64.3	64.3	64.4			
8	2025-16	124.4M	0.0	1,959,568	1,951,842	0	0	64.2	64.2	64.4			
9	2025-17	121.9M	0.0	1,914,983	1,903,708	0	0	64.3	64.3	64.7			
10	2025-18	128.8M	0.0	2,023,883	2,012,009	0	0	64.7	64.7	65.1			
11	2025-19	129.8M	0.0	2,029,296	2,017,496	0	0	64.8	64.8	65.2			
12	2025-20	127.8M	0.0	1,998,389	1,986,401	0	0	64.7	64.7	65.2			
13	2025-21	127.1M	0.0	1,980,826	1,968,113	0	0	64.7	64.7	65.1			
14	2025-22	123.8M	0.0	1,935,742	1,923,972	0	0	64.6	64.6	65.0			
15	2025-23	129.8M	0.0	2,031,571	2,019,486	0	0	64.8	64.8	65.2			
16	2025-24	132.8M	0.0	2,072,889	2,062,850	0	0	64.9	64.9	65.3			
17	2025-25	129.5M	0.0	2,023,827	2,017,387	0	0	64.8	64.8	65.0			
18	2025-26	105.1M	0.0	1,642,254	1,639,229	0	0	64.5	64.5	64.6			

View 2: [Overview] Volume Trend



View 3: [Deep Dive] PPH

View 4: [Deep Dive] Staffing & LO

View 5: [Deep Dive] Volume

Rolled Volume											
		metric_week									
region	station	2025-15	2025-16	2025-17	2025-18	2025-19	2025-20	2025-21	2025-22	2025-23	2025-24
		rolled_volu...									
Almond Belt	DCX5	4,837	0	0	0	0	0	0	0	0	0
	DFO2	9,420	0	0	0	0	0	0	0	0	0
	DFO3	8,166	0	0	0	0	0	0	0	0	0
	DSF7	7,851	0	0	0	0	0	0	0	0	0
	DUR3	78,715	0	0	0	0	0	0	0	0	0
	DXC5	67,857	0	0	0	0	0	0	0	0	0
	DXC8	39,386	0	0	0	0	0	0	0	0	0
	Almond Belt ...	216,231	0	0	0	0	0	0	0	0	0
Baker	DSK4	15,209	0	0	0	0	0	0	0	0	0
	DSW3	27,508	0	0	0	0	0	0	0	0	0
	DWA2	67,132	0	0	0	0	0	0	0	0	0
	DWAS	15,435	0	0	0	0	0	0	0	0	0
	DWAG	11,900	0	0	0	0	0	0	0	0	0
	DWS4	1,570	0	0	0	0	0	0	0	0	0
	Baker Subtotal	138,754	0	0	0	0	0	0	0	0	0
Baltimore	DBA8	34,879	0	0	0	0	0	0	0	0	0
	DL1	14,479	0	0	0	0	0	0	0	0	0
	DMD2	68,218	0	0	0	0	0	0	0	0	0
	DMD4	327	0	0	0	0	0	0	0	0	0
	DMD5	2,443	0	0	0	0	0	0	0	0	0
	DMD6	85,556	0	0	0	0	0	0	0	0	0
	Baltimore Subtotal	205,902	0	0	0	0	0	0	0	0	0

Volume Analysis														
		planned_act_week												
region	station	2025-15	2025-16	2025-17	2025-18	2025-19	2025-20	2025-21	2025-22	2025-23	2025-24	2025-25	2025-26	2025-27
		volume	volume	volume	volume	volume	volume	volume	volume	volume	volume	volume	volume	volume
Almond Belt	DCX5	-5.43%	-9.42%	+4.59%	+0.64%	-0.82%	+0.68%	-3.21%	+5.86%	+1.14%	-5.16%	+2.59%	-10.34%	
	DFO2	-1.21%	-13.87%	+21.30%	-9.40%	-0.04%	+0.24%	-4.16%	+8.41%	+1.53%	-5.20%	+2.86%	-12.35%	
	DFO3	-0.99%	-10.25%	+7.70%	+0.50%	-0.01%	+0.57%	-2.87%	+5.16%	+0.95%	-5.28%	+6.93%	+0.45%	
	DSF7	-1.41%	-22.44%	+4.07%	+13.55%	-9.28%	-1.16%	-5.34%	+9.22%	+0.62%	-8.04%	+3.05%	-9.54%	
	DUR3	-0.29%	-11.69%	+8.35%	+12.76%	-6.15%	+8.33%	+15.52%	+7.72%	-17.71%	-14.03%	+16.95%	-22.57%	
	DXC5	-8.05%	-14.35%	+19.76%	-13.73%	+14.46%	+0.58%	-16.74%	+17.71%	+1.04%	-14.54%	+41.07%	-32.00%	
	DXC8	-21.23%	-12.57%	+18.19%	-6.83%	-0.56%	+8.08%	-9.48%	+13.93%	+1.26%	-12.44%	+2.52%	+7.53%	
	Almond Belt ...	-5.56%	-15.77%	+12.29%	-0.33%	-0.75%	2.92%	-2.43%	9.67%	-3.80%	-9.99%	12.13%	-13.56%	
Baker	DSK4	+11.67%	-16.42%	+27.64%	+1.90%	-8.00%	-3.15%	-3.51%	+6.38%	+1.35%	-4.85%	-8.85%	-11.04%	
	DSW3	+1.56%	-7.76%	+8.17%	+3.70%	-0.23%	-12.21%	+9.74%	+11.25%	+1.52%	-20.25%	+27.27%	-14.76%	
	DWA2	-3.61%	-10.35%	+7.92%	+4.78%	-1.18%	+0.26%	-5.24%	+6.69%	+1.25%	-2.77%	+1.76%	-9.55%	
	DWAS	-14.07%	-8.08%	+13.58%	+9.69%	-9.34%	-0.12%	-2.98%	+7.05%	+1.82%	-4.19%	-0.25%	-10.90%	
	DWAG	-19.94%	-8.70%	+7.33%	+4.11%	+0.39%	+0.24%	-3.13%	+5.90%	+1.35%	-3.72%	+0.89%	-9.51%	
	DWS4	-14.92%	-9.08%	+22.15%	-4.64%	-4.67%	+0.54%	-2.61%	+6.12%	+1.94%	-4.91%	+1.36%	-10.45%	
	Baker Subtotal	-6.19%	-10.34%	14.16%	2.84%	-3.59%	-2.60%	-1.52%	7.30%	1.50%	-7.04%	3.56%	-11.10%	
Baltimore	DBA8	-1.16%	-9.80%	+6.32%	+2.38%	-0.23%	-1.10%	-1.82%	+6.37%	+1.78%	-4.98%	+1.63%	-10.91%	
	DLD1	-15.88%	+3.46%	-7.70%	+15.06%	-0.58%	-1.08%	-2.44%	+6.81%	-10.52%	-5.48%	+2.23%	-11.23%	
	DMD2	-9.48%	+4.42%	-8.06%	+16.89%	-1.07%	-0.87%	-2.01%	+5.78%	+2.41%	-4.24%	+13.48%	-19.52%	
	DMD4	-20.52%	-9.53%	+6.27%	-0.41%	-1.03%	+16.24%	-1.13%	+6.52%	+2.95%	-18.70%	+24.44%	-27.02%	
	DMD5	-2.23%	-0.79%	+21.40%	+1.94%	-10.43%	-1.03%	-2.08%	+5.14%	+12.67%	-7.60%	+25.51%	-17.76%	
	DMD6	-3.10%	-9.18%	+0.98%	+11.74%	-9.09%	+8.53%	-9.84%	+38.61%	-14.25%	-17.58%	+26.11%	-13.20%	
	Baltimore Subtotal	-10.64%	-2.42%	-0.91%	10.52%	-3.67%	3.28%	-3.89%	13.58%	-4.94%	-10.34%	15.16%	-16.38%	

Part 5 - Project Plan

	A	B	C	D	E	F	G	
1	Milestone	Epic	Tasks	Sub-tasks	Sizing (S = 1 day, M = 2-3 day, L = 1 Week, XL = 2-3 Week)	Status	ECD	
2	Dataset	Includes all required data sources	Planned		S	Completed	4/18/2025	
3			Actual		S	Completed	4/18/2025	
4			Guidance		L	Completed	4/18/2025	
5			OP2 PPH	Ingest OP2 PPH excel data from finance into a datalake table	S	Completed	4/25/2025	
6			Benchmark PPH	Request benchmark data access from GSBA team	M	Completed	4/25/2025	
7			WFS RR, Lock Week		S	Completed	4/25/2025	
8			30 Mins Incremental Refresh	Query Optimization	Fine tune data filters and optimize query logic	L	Completed	5/5/2025
9			Structure that supports horizontal layout from left to right	Add a labelling column	without slowing down the query performance	M	Completed	5/5/2025
10			Custom Tag Availability Check	Identify POC and confirm availability	without slowing down the query performance	S	Completed	4/18/2025
11	Visualization	Build out views			M	Completed	5/5/2025	
12		Conditional Formatting for flags	Flag involves multiple conditions		S	Completed	5/5/2025	
13			Flag involves parameter control		S	Completed	5/5/2025	
14	Review	Bi-Weekly Check In	Check in with Zach, Sayak, Katelyn on progress		S	Completed	4/25/2025	
15		Final Review	Final Review with leadership Rachel, Joe, Jerid, Amit, Zach, Sayak, Katelyn		S	Completed	5/5/2025	

Appendix

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A. Case Study: Texazona

Sub Super Region Texazona weekly output review call on Thursday (60 minutes) requires the AMZL UTR P&O team do 8 manual excel sheets pulled from 3 dashboards, and 2 additional excel data sources to provide [Region + Week] level data. Under Texazona, Phoenix Region output review call on Wednesday (60 minutes) requires additional [Station + Cycle + Daily] grain user reports downloaded from ALPS UI to deep dive on top of the above process.

Throughout the week, the same pull process repeats three times a day from Wed to Thu and once on Fri, each time takes minimum ~15 mins to consolidate and flag. With similar or more complex processes occurring across all 12 Super Regions and 69 Regions, these manual approaches create inconsistencies in format,

metrics, and update timelines. This lack of standardization complicates work coverage during absences and requires unnecessary additional training during handoffs.

B. * Items Explained

* Custom Tags (for past two weeks)

04/04 — Per Sayak's request, pulls custom tagged plans besides the Latest Weekly Plan, which might pose challenge on query time, hence needs further confirmation.

04/14 — Team aligned on adding this as a side feature (filter) if data available in the backend, and build out PoP based on this as part of PULSE Phase 2.

* Cadence

Six data sources and large amount of data makes a refresh cadence of 30 mins challenging (original LPR dashboard takes ~50 minutes to refresh each time), hence requires proper data filtering and query optimization.

C. Progress Track

Past 30 Days

- 3/10/2025: Initial convo started on Slack
- 3/14/2025: First Meeting between BIE, P&O, Strategy and Product to start the convo
 - Identified best home for Output Review tool - [Labor Planning Review Dashboard](#)
 - Defined next steps of collecting initial requirements
- WK12-13: P&O team collected all current Output Review files being used in reviews by sub-super region, and consolidated what is needed from each in a standardize view, including:
 - Data sources, time range of data, display view/formatting, risk flagging logic
- 3/26/2025: Second Meeting, reviewed above output mockups
- 04/04/2025: Third meeting, aligned on documenting all relevant info and have all parties' alignment before proceeding with implementation

D. Existing Content in Labor Planning Review Dashboard

Sheet Name	Insights	Cadence
Plan IDs	Provides the Latest Weekly plan id for Station, Region, Sub Super, Super	Hourly
Attendance Risk	This view provides a comparison of actual, guidance and planned Attendance and categorizes Attendance risk based on user defined thresholds	Hourly
Attrition Risk	This view provides a comparison of actual, guidance and planned Attrition and categorizes Attrition risk based on user defined thresholds	Hourly
VET/VTO Escalations	This view displays planned VET/ VTO percentages at a station - cycle level and categorizes VET/ VTO Risk for stations based on the user defined thresholds	Hourly
RV Risk	This view displays planned Rolled Volume at a station - cycle level and categorizes Rolled Volume Risk for stations based on the user defined thresholds	Hourly
PPH Risk	This view provides a comparison of actual and planned PPH and categorized PPH risk based on user defined thresholds	Hourly
LO Risk	This view displays Labor Order at a station - cycle level with custom flags and comparison to staffing %	Hourly

E. BI 2025 Best Practices Compliance Check

Are We creating more unnecessary tabs? **No**

1. This is going to be one tab containing all necessary data and serving as a one-stop-shop dashboard for potentially all 12 Sub Super Regions and 69 Regions
2. Upon checking against [One Stop Shop](#), most of them don't already exist based on the specific structure & format
3. Why can't we use the existing tabs in the Labor Planning Review Dashboard?
 - a. They contain similar data, but don't meet most requirements for the output review call
 - b. User report on possibly inaccurate data/logic
 - c. Inefficient backend design, causing the dataset takes ~50 mins to refresh, and becomes difficult to maintain after many iterations

F. Input Assumptions Review Process

Input review process will be addressed by [BIRD](#) (Bulk Input Review & Delivery) UI, hence not discussed in this doc

Tech Documentation

Data	Tool	Cadence	Account	Note
AWS Glue process planned & guidance pph data, export to s3	Glue Job: lpr_pph_plan_guidance	Every 30 mins	AWS Account: 227345254668	This intends to mimic the GAP-PPH logic. Reason why it's not in quicksight is it would scan 200 GB data due to the complex logic and timeout. This is a workaround.
Above picked up by crawler	Crawler: Cradle_Sourced_Crawler-copy	Every 30 minutes, starting at 40 minutes past the hour	AWS Account: 227345254668	
Above referenced in quicksight dateset, along with Actual, OP2, Benchmark data	Quicksight Dataset: LPR - PPH Base	Incremental refresh every 30 mins at 45 mins past the hour	amzlbiaquicksight	Owner Access Granted to: prasrrao-team
Staffing & LO data are processed in quicksight dataset	Quicksight Dataset: LPR - Staffing	Incremental refresh every 30 mins at 45 mins past the hour	amzlbiaquicksight	Owner Access Granted to: prasrrao-team
Rolled Volume data are processed in quicksight dataset	Quicksight Dataset: Rolled Volume Weekly	Incremental refresh every 30 mins at 45	amzlbiaquicksight	Owner Access Granted to: prasrrao-team

		mins past the hour		
All the above consolidated into one quicksight dashboard, two tabs: 'Presentation View', 'Presentation Volume'	Analysis: Labor Planning Review Analysis Dashboard: Labor Planning Review Dashboard	amzlbiaquicksight	Analysis Owner: Yazan Shnoudi	

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