



## INFORMS Transactions on Education

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To cite this article:

Dessislava A. Pachamanova (2015) Case—Managing Staffing Inefficiencies Using Analytics. INFORMS Transactions on Education 16(1):23-23. <https://doi.org/10.1287/ited.2015.0146cs>

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## Case

# Managing Staffing Inefficiencies Using Analytics

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*Keywords:* business analytics; data science; problem framing; data analytics lifecycle; experiential learning; role playing

*History:* Received: December 2014; accepted: August 2015.

AdviseInvest is a venture-backed startup. The company's mission is to provide tools and support to help ordinary people gain control of their personal finances. AdviseInvest leverages technology to provide affordable financial advice to a national client base.

Customers who reach AdviseInvest's website complete a customer profile form with basic information about **their background and finances**. They go through five steps:

1. Open an account.
2. **Fill out a profile.**
3. Schedule a free phone conversation.
4. Attend the free phone conversation.
5. **Buy a financial plan.**

There are three types of financial plans: **Beginner**, **Intermediate**, and **Advanced**. Each is sold at a **different price**, and there are varying **degrees of per-**

**sonalization**. After a customer purchases a financial plan, the customer is assigned a financial planner who helps determine the customer's goals and advises the customer on spending decisions.

### Staffing Challenges

At **each stage of the process**, a **percentage of customers are lost**. Steps 3 and 4 are particularly challenging because approximately 50% of those who schedule a phone conversation fail to pick up the call. This leads to inefficiencies from a staffing perspective.

### Assignment

Your goal is to determine whether there is an analytics challenge for AdviseInvest, to identify the stakeholders, and to use the **Data Analytics Lifecycle framework** to outline the steps in a potential analytics project. The Director of Sales has made herself available for an interview.