# MAXIMUS

# MAXDAT Production Planning for Contact Center

# Features and Metrics Supported

# 31-May-2013

To-Be Features

1. Ability to manually load production plan data using a simple (requiring no more than 30 minutes of training) 1-2 step process from Arena output (csv file) to database where “actuals” data is stored for reporting.
2. Ability to load data from any source that has been inserted to standardized staging tables. This enables push of actual data from external systems, event processors, etc.
3. Ability to update plan data for all or part of a plan period by following the same steps as #1 or #2 above for the plan and without affecting actuals already calculated for the production plan.
4. Ability to join on date and/or date and interval , e.g., 30 minutes and unit of work (contact center queues) to actuals data.
5. Grain per unit of work will be by time interval (default is 30 minutes) for both forecast and actuals. Grain may vary for different units of work within the same plan and period but will be consistent within a single unit of work. For example, a unit-of-work will not contain a forecast by hour for one week and by date for another week.
6. Ability to drill in to details on actuals data within a single unit-of-work. Drilling to individual record details will be configured per-report and limited to reports for a specific unit of work where detail data is available.
7. Actual Counts and metric values will be calculated and updated on a schedule to be configurable by plan and unit-of-work.
8. Identifiers will be captured for actual counts to enable drilling to details within reports.
9. **Randall Comment: I do not think this feature and its metrics are going to be applicable for contact center – but I am still confirming** ~~Calculations for actual inventory metrics will be performed only for the current day and hour (if applicable).~~ 
   1. ~~Actual Inventory intervalby unit of work~~
   2. ~~Actual Inventory Average Age intervalby unit of work~~
   3. ~~Actual Inventory Min Age intervalby unit of work~~
   4. ~~Actual Inventory Max Age intervalby unit of work~~
   5. ~~Actual Inventory Mean Age intervalby unit of work~~
   6. ~~Actual Inventory Median Age intervalby unit of work~~
   7. ~~Actual Inventory Standard Deviation Age intervalby unit of work~~
   8. ~~Actual Inventory Jeopardy intervalby unit of work~~
   9. ~~Percent Deviation Inventory Average Age intervalby unit of work~~
   10. ~~Percent Deviation Inventory Min Age intervalby unit of work~~
   11. ~~Percent Deviation Inventory Max Age intervalby unit of work~~
   12. ~~Percent Deviation Inventory Mean Age intervalby unit of work~~
   13. ~~Percent Deviation Inventory Median Age intervalby unit of work~~
   14. ~~Percent Deviation Inventory Standard Deviation Age intervalby unit of work~~
10. **Randall Comment: I do not think this feature and its metrics are going to be applicable for contact center – but I am still confirming** ~~During load of daily forecast data, the system will calculate the average age of inventory and forecast jeopardy inventory for each date. Business rules for jeopardy and average age will be easily configurable.~~
11. Actual Contacts Created measures ,Contacts Offered measures, Contacts Handled measures , Contacts Handled per “Time Bucket” measures (Randall comment “ Need a better metrics definition) but for now you get the idea) Staff Hours Assigned, and handle time measures will be calculated and updated by interval for 1 day following the plan date.
12. All metrics that have a “forecasted” and “actual” measure will also also have calculated a simple deviation metric and a percent deviation metrics, e.g., For the pair metrics of Forecasted Contacts Created and Actual Contacts Created there will be a Deviation Contacts Created and a Percentage Deviation Contacts Created Metrics
13. All metric of central tendency , i.e., measure an average (Average Handle Time) will have a Mean , Median, Min, Max, and Standard Deviation Metrics , For Example the Average Handle Time will have Mean Handle Time , Median Handle Time, etc.
14. Ability to manually load actuals from a formatted text file (csv)
15. Ability to process and load actuals from defined standard staging area. This enables push of actual data from external systems, event processors, etc.
16. Attributes Required for Reporting
    1. Region
    2. State or Province ( Might be able to be handled by Region)
    3. Project
    4. Program
    5. Site ( Need to discuss how best to add this to BPM events tables)
    6. Production Plan Name
    7. Plan Start Date
    8. Plan Start Hour
    9. Plan End Date
    10. Plan End Hour
    11. Forecast Last Modified Date
    12. Plan Creation Date
    13. Unit of Work Type (This needs to be added to BPM tables)
    14. Unit of Work Name (e.g., Queue Name )
    15. Time Unit (used of handle times etc, default is minutes)
    16. Plan Date
    17. Plan Hour
17. Metrics Required for Reporting ( all by interval)
    1. Forecast Contacts Created
    2. Forecast Contacts Offered
    3. Forecast Contacts Handled
    4. Forecasted Average Speed to Handle
    5. Forecast Contacts Abandoned
    6. ~~Forecast Inventory~~
    7. ~~Forecast Inventory Average Age~~
    8. ~~Forecast Inventory Jeopardy~~
    9. Forecast Average Time to Claim (Average Speed to Answer)
    10. Forecast Average Handle Time
    11. Forecast Labor Minutes Total
    12. Forecast Labor Minutes Available (Hours?) – Time logged on
    13. Forecast Labor Minutes Waiting – logged in but not handling a call
    14. Forecast Total Headcount ( all staff – regardless of status)
    15. Forecast Headcount (logged on) – note : may need to be an average over the interval
    16. Forecast Headcount unavailable (logged out for any reason)
    17. Actual Contacts Created – IVR or ACD? Does this need to be staged by itself? Default should be the IVR but could be the switch if the switch handles the IVR calls.
    18. Actual Contacts Offered - ACD
    19. Actual Contacts Handled - ACD
    20. Actual Average Speed to Handle – Is this ANSWER\_WAIT\_TIME?
    21. Actual Time to Handle “Time Bucket” 1 thru n” (**Randall Note: need to list out how many discrete time buckets we will support – key question to Roger –** ANS\_INTERVAL\_X (ACD)
    22. Actual Contacts Abandoned – ACD
    23. ~~Actual Inventory~~ – Task Management
    24. ~~Actual Inventory Average Age~~– Task Management
    25. ~~Actual Inventory Jeopardy~~– Task Management
    26. Actual Average Time to Claim (Average Time to Answer) - ACD
    27. Actual Average Handle Time - ACD
    28. Actual Labor Minutes Total – WFM could come from ACD but prefer it from the WFM
    29. Actual Labor Minutes Available (Hours?) – Time logged on – WFM could come from ACD but prefer it from the WFM
    30. Actual Labor Minutes Waiting – logged in but not handling a call – WFM could come from ACD but prefer it from the WFM Actual Total Headcount ( all staff – regardless of status) – \*\*WFM
    31. Actual Headcount (logged on) - note : may need to be an average over the interval – WFM \*could come from ACD but prefer it from the WFM
    32. Actual Headcount unavailable (logged out for any reason) – WFM \* could come from ACD but prefer it from the WFM