

Personnel Assignment Analysis - Complete Deliverables Index

Analysis Date: November 6, 2025

Project: Phoenix Territory Reorganization - Personnel/Route Assignment Study

Status: ✓ Complete



Primary Deliverables

1. Personnel Assignment Analysis.xlsx

Comprehensive Excel workbook with 7 tabs:

- **Executive Summary:** High-level statistics and branch staffing overview
- **Technician Summary:** Complete details for all 32 technicians with color-coded alignment status
- **West Branch:** Recommended technicians and assignments for West territory
- **Central Branch:** Recommended technicians and assignments for Central territory
- **East Branch:** Recommended technicians and assignments for East territory
- **Tucson Branch:** Recommended technicians and assignments for Tucson territory
- **All Accounts Detail:** Complete account listing with current and new assignments

Features:

- Color-coded recommendations (Green=Assign Here, Yellow=Primary/Split, Orange=Consider, Red=Reassign)
 - Sortable columns for easy analysis
 - Account counts and percentages for each technician
 - Branch-by-branch summaries
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2. PERSONNEL_ASSIGNMENT_REPORT.txt

Detailed narrative report including:

- Executive summary of findings
 - Alignment status breakdown
 - Branch-by-branch staffing recommendations
 - Technician-by-technician analysis for mixed territory cases
 - Implementation considerations
 - Next steps and recommendations
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3. Personnel Assignment Overview.png

Six-panel visualization dashboard:

1. Technician alignment status distribution (pie chart)

2. Account distribution by new territory (bar chart)
 3. Recommended technicians by branch (bar chart)
 4. Top 15 technicians by account count (horizontal bar)
 5. Route complexity analysis (territories per technician)
 6. Branch comparison matrix (accounts vs technicians)
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4. Personnel_Territory_Distribution.png

Territory-specific technician rankings:

- Four panels (West, Central, East, Tucson)
 - Top 20 technicians per territory
 - Color-coded by recommendation status
 - Account counts displayed
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Supporting Data Files

5. personnel_analysis_all_accounts.csv

Complete dataset with all 1,674 accounts including:

- Customer information
- Current route and technician assignments
- New territory assignments
- Days of service
- Parsed route components (Office, Territory, Route Number, Technician)

6. personnel_technician_summary.csv

Summary statistics for all 32 technicians:

- Account counts by territory
 - Alignment status
 - Primary territory recommendation
 - Percentage of accounts in primary territory
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Key Findings Summary

Metric	Value
Total Accounts	1,674
Total Technicians	32
Fully Aligned	13 (40.6%)
Mostly Aligned	10 (31.3%)
Mixed Territory	9 (28.1%)
Highly Fragmented	0 (0%)

Branch Staffing

Branch	Accounts	Recommended Technicians	Avg Accounts/Tech
West	519	11	47.2
Central	512	10	51.2
East	557	10	55.7
Tucson	74	1	74.0

Implementation Impact

- **Low Impact (Fully + Mostly Aligned):** 23 technicians (71.9%) can transition smoothly
- **Medium-High Impact (Mixed Territory):** 9 technicians (28.1%) require strategic planning

How to Use These Deliverables

1. **Start with the Excel file (Personnel_Assignment_Analysis.xlsx):**
 - Review the Executive Summary tab
 - Examine the Technician Summary for the complete picture
 - Dive into individual branch tabs for territory-specific details
2. **Review visualizations** for quick insights:
 - `Personnel_Assignment_Overview.png` for high-level statistics
 - `Personnel_Territory_Distribution.png` for territory-specific rankings
3. **Read the detailed report (PERSONNEL_ASSIGNMENT_REPORT.txt):**
 - Understand implementation considerations

- Review next steps and recommendations
- Identify technicians requiring strategic decisions

4. Use CSV files for further analysis or integration:

- Import into other systems
 - Perform custom calculations
 - Create additional reports
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Next Actions

Immediate:

- ✓ Review technician assignments in Excel workbook
- ✓ Identify technicians with mixed territory status requiring decisions
- ✓ Evaluate unassigned accounts (40 accounts currently unassigned)

Planning Phase:

- Confirm fully aligned technician assignments
- Plan reassignment of accounts for mostly aligned technicians
- Make strategic decisions on 9 mixed territory technicians
- Consider technician preferences and geographic feasibility

Implementation:

- Phase assignments starting with fully aligned technicians
 - Gradually transition mixed territory cases
 - Balance workloads within each branch
 - Monitor customer service continuity
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Notes

- The map application at **phoenixnewlocations.abacusai.app** remains unchanged per your request
 - This analysis is based on current route assignments and new territory zip code mapping
 - All recommendations are data-driven based on account distribution
 - Final personnel decisions should consider technician preferences, skills, and logistics
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Questions or need additional analysis? All source data is available in the CSV files for further exploration.