

Andrew Reise

Retail Staffing Optimization

Workforce Planning Improves Customer Experience

CASE STUDY

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Executive Summary

Andrew Reise assisted a large financial services company create and deliver a workforce planning solution across more than 6,000 offices. The scope of the program included design, development, and implementation of a solution which enabled field leaders to effectively deploy over 60,000 retail professionals. This initiative represented approximately \$500 million in workforce resources, which were consequently available to provide service at optimal times for their clients.

Business Challenge

The company was losing approximately 25% of their retail workforce annually, due to an aging resource pool. This loss required a significant annual investment in hiring new professionals and was constraining operating capital. Through a separate effort, the company planned to consolidate and close more than 500 retail offices. This created a situation where retail staffing was significantly misallocated throughout North America. Our client needed to develop a strategic capability to assign their retail resources with and be flexible to the changing business conditions.

PROJECT LEADERSHIP

Influence without Authority

The right leadership makes all the difference. Our consultants are strong leaders that can effectively navigate through challenges to help you achieve your goals. We understand your business's unique needs and implement solutions to drive success.

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HOW ANDREW REISE HELPED

Our consultants engaged a cross-functional team to design the staffing solution and ensure it was delivered to the field leaders with excellence.

Andrew Reise led the design, development, and implementation efforts for the staffing solution. Our consultants engaged a cross-functional team to design the staffing solution and ensure it was delivered to the field leaders with excellence. The model was used by field leaders and was integrated into the internal systems of the company.

Design and Development

Andrew Reise consultants became early project leaders assisting in the design and development of the solution. With a heavy focus on creating a new staffing model, we included many functional leaders throughout the organization.

Due to the broad scope of the program, we helped create a model linking complex and disparate data sets. This data represented the needs of: customers, retail professionals, and the financial performance of each geographical location. By combining these three perspectives, the team was able to develop a model which could produce workforce staffing recommendations and the associated financial impact. This ensured the solution was relevant to senior level executives as well as the leaders in the field.

Implementation

To implement the solution, Andrew Reise worked in conjunction with key leaders from the company including: Operational Vice Presidents, Field Leaders, and Human Resources. More than 500 Field Leaders across the country used the tool to ensure they had the appropriate retail professionals in their designated offices to best serve their customers.

Support

Post implementation, our consultants supported the staffing tool, which included directly interfacing with field leaders to make adjustments to the model. Since the activities included both moving retail professionals and closing offices, the model was designed to be flexible to company changes.

RESULTS ACHIEVED

The solution allowed the company to make significant strides to the customer experience provided in their retail locations. Additionally, the company was able to:

- Make strategic decisions on where to allocate their most talented and tenured retail professionals
- Optimally serve the growing Hispanic demographic portion of their client base
- Increase customer and employee retention
- Set a foundation for consistent workforce planning operations which could be further integrated through internal systems

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We speak **Customer.**

It's a language we know very well. We're Andrew Reise, a recognized global thought leader who specializes in improving both sides of the company/customer relationship.

Our unique approach consists of our own methodology and a group of distinctly selected consultants – who are all veterans in customer experience. Our process is proven and our people boast a 'do it all' no-nonsense approach and are empowered to do the right thing even if that means going above and beyond the original scope of work.

The Andrew Reise mission: Bettering the lives of our clients, colleagues, and communities.



IF YOU WANNA COME VISIT US.

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