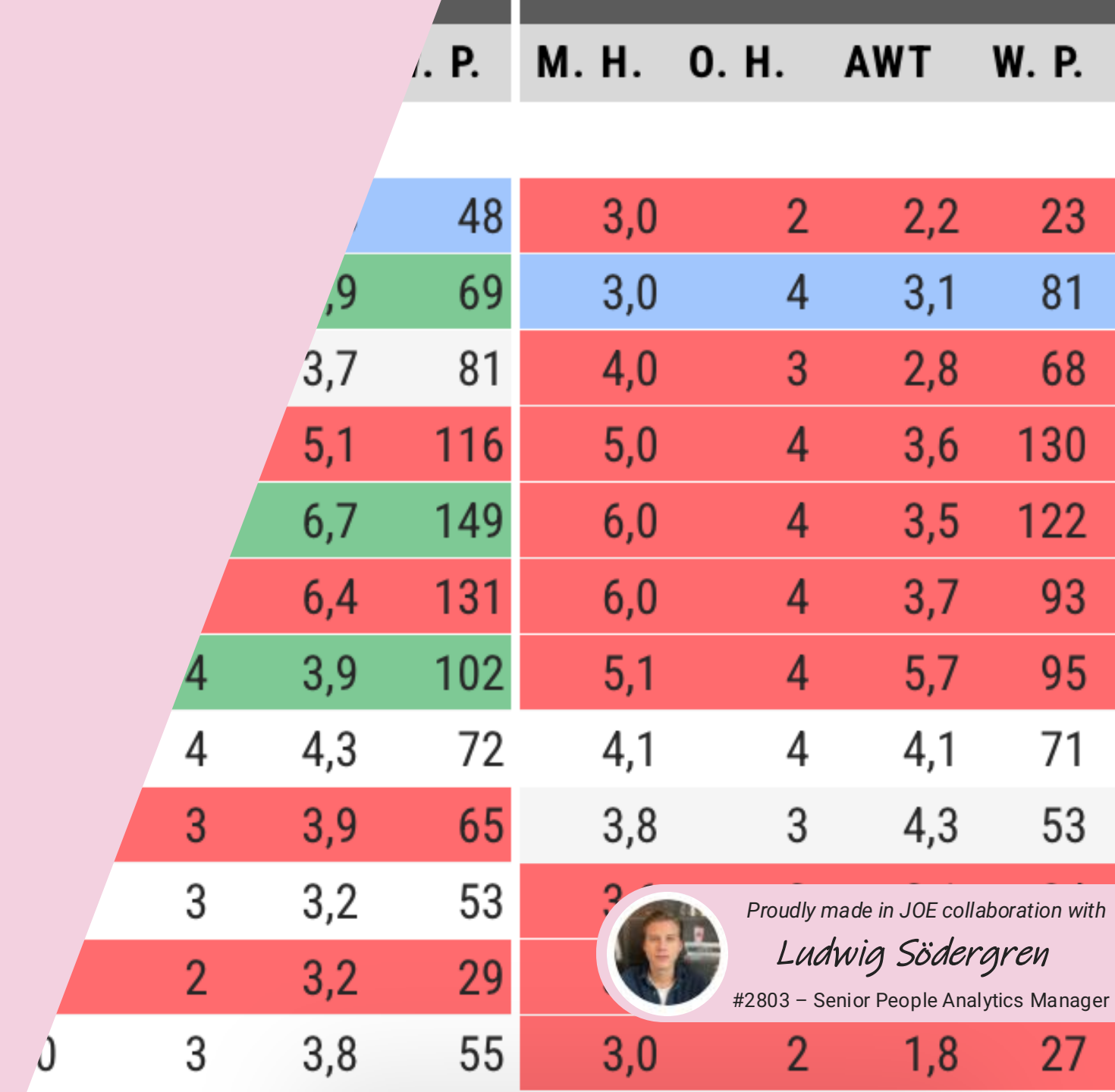
Shiftplanning

Moneyball 2.0 Leadership training



. P.		M. H.	O. H.	AWT	W. P.
	48	3,0	2	2,2	23
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3,7	81	4,0	3	2,8	68
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6,7	149	6,0	4	3,5	122
6,4	131	6,0	4	3,7	93
3,9	102	5,1	4	5,7	95
4,3	72	4,1	4	4,1	71
3,9	65	3,8	3	4,3	53
3,2	53				
3,2	29				
3,8	55	3,0	2	1,8	27

Proudly made in JOE collaboration with

Ludwig Södergren

#2803 – Senior People Analytics Manager

SESSION BREAKDOWN

A big topic broken down in four sessions to give learnings one step at a time

Session 1

LEARNING GOALS

1. **SHIFTPLANNING STATS**
   Learn how to analyse Shiftplanning Stats

2. **BUILDING AN ANALYTICAL MINDSET**
   Learn how to create recommendations & actions based on both operational observations & data analysis

Session 2

LEARNING GOALS

1. **SALARY CONTROLLER – Key KPI's for shiftplanning**
   Learn how to assess own shiftplan based on Revenue Target & Salary % target

2. **TAKING ACTION**
   Learn how to create sustainable recommendations which are sensible from both an operational and cost perspective

Session 3

LEARNING GOALS

1. **MAKING SENSIBLE ADJUSTMENTS**
   Making an adjustments in shiftplanning based on operational observation, analytical mindset, and Salary %

Session 4

LEARNING GOALS

1. **UNDERSTANDING & NAVIGATING WP2 Reports**
   Identifying and navigating the relevant WP2 reports used for shiftplanning

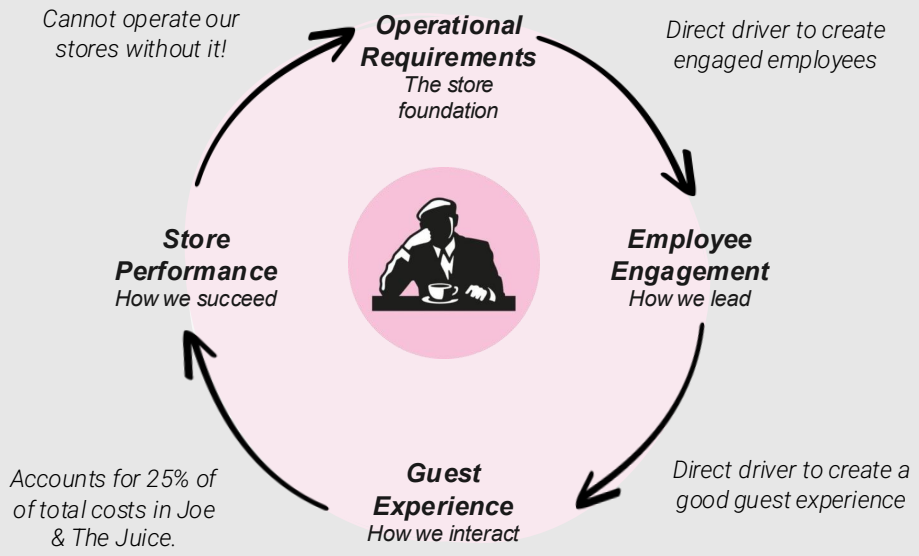
2. **TEMPLATE CREATION**
   Learning how to create a template in advance based on the data available & the information gathered from the store

Aim is to unlock more responsibility at each session ending up with full shiftplan responsibility post session 4

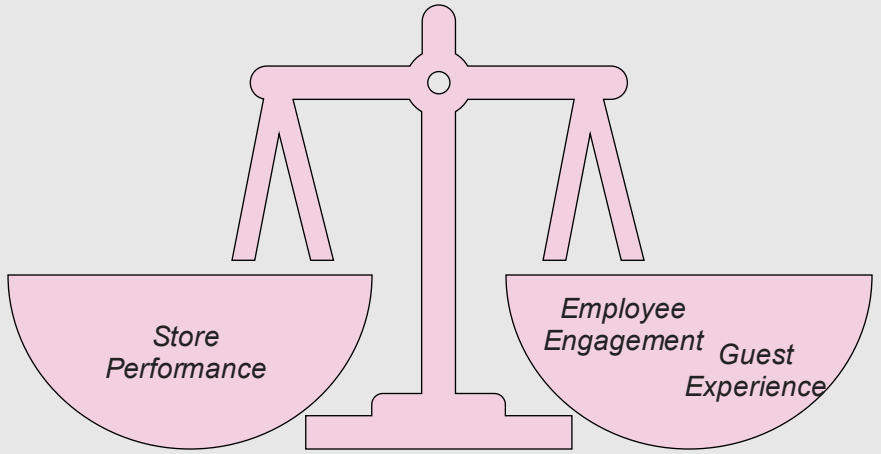
HOW DOES SHIFTPLANNING IMPACT OUR BUSINESS?

Shiftplanning as a huge driver that needs attention

SHIFTPLANNING IS KEY TOOL TO ENSURE OPERATIONAL EXCELLENCE



CREATING THE "PERFECT BALANCE"



DON'T SPEND TOO MANY HOURS TO:

- ✓ Reach Salary % target
- ✓ Reach a healthy Productivity
- ✓ Not spend unnecessary salary hours
- ✓ Make Joe a helathy business who can spend the money in the right way

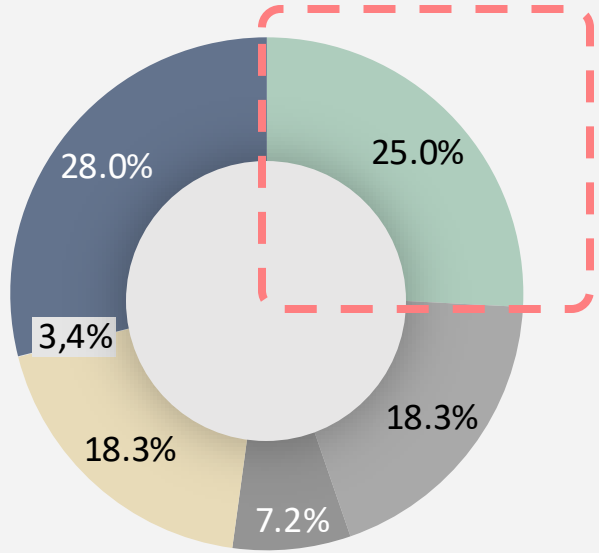
ENOUGH JUICERS ON SHIFT TO:

- ✓ Create a good team spirit
- ✓ Engage employees in the workplace
- ✓ Serve guests
- ✓ Create a great guest experience

WHY IS IT KEY TO BE IN CONTROL OF YOUR SALARY COST UK

Salary cost is the biggest cost of running a Joe & The Juice store

As Managers, you are controlling one of the most crucial components for being able to operate a store in Joe & the Juice. The shift planning is essentially controlling 25,2% of the SOC in Joe & the Juice. Having this responsibility for the business demands the full attention!



SALARY COST BREAK DOWN

- *FRB Ground Floor* = 4,000,000DKK
- *FRB 1st Floor* = 1,300,000DKK
- *Axel Towers* = 1,500,000DKK
- *Vesterbrogade* = 1,650,000DKK
- *Tivoli* = 2,400,000DKK
- *KBH H* = 4,400,000DKK
- Gl. Kongevej = 1.500.000DKK
- Fisketorvet 1 = 2,000,000DKK
- Fisketorvet 2 = 1.200.000DKK

TOTAL = 20mDKK

Fixed	Moving
Delivery fee	Location cost
Cost of goods sold	Salary percentage
Direct operational cost	SOC

Numbers may change for your store

AGENDA

1 Why is this skill important?

2 How to master the skill

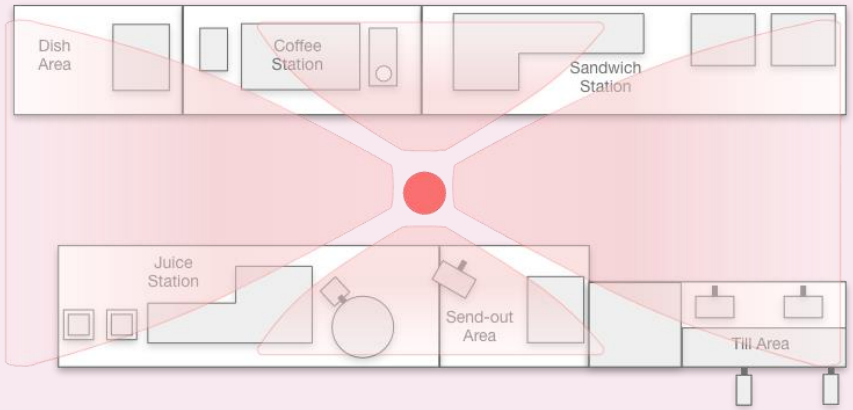
3 Sum-up and Impact

4 How to apply into practice

THE IMPORTANCE OF THE MANAGER ROLES

Manager with ultimate store insights and inputs to determine optimal shiftplanning

MANAGER OPTICS



- ✓ Knows what goes on in the store
- ✓ Able to analyse every minute of the traffic & performance

Missing strong data analysis in decision-making

VS

OPERATIONAL PLANNER OPTICS

- ✓ Decision-making based on data analysis
- ✓ Holistic overview of the store performance

Missing “every-day optics” in decision making

APPENDIX: GLOSSARY

Understanding the lingo of Shiftplanning

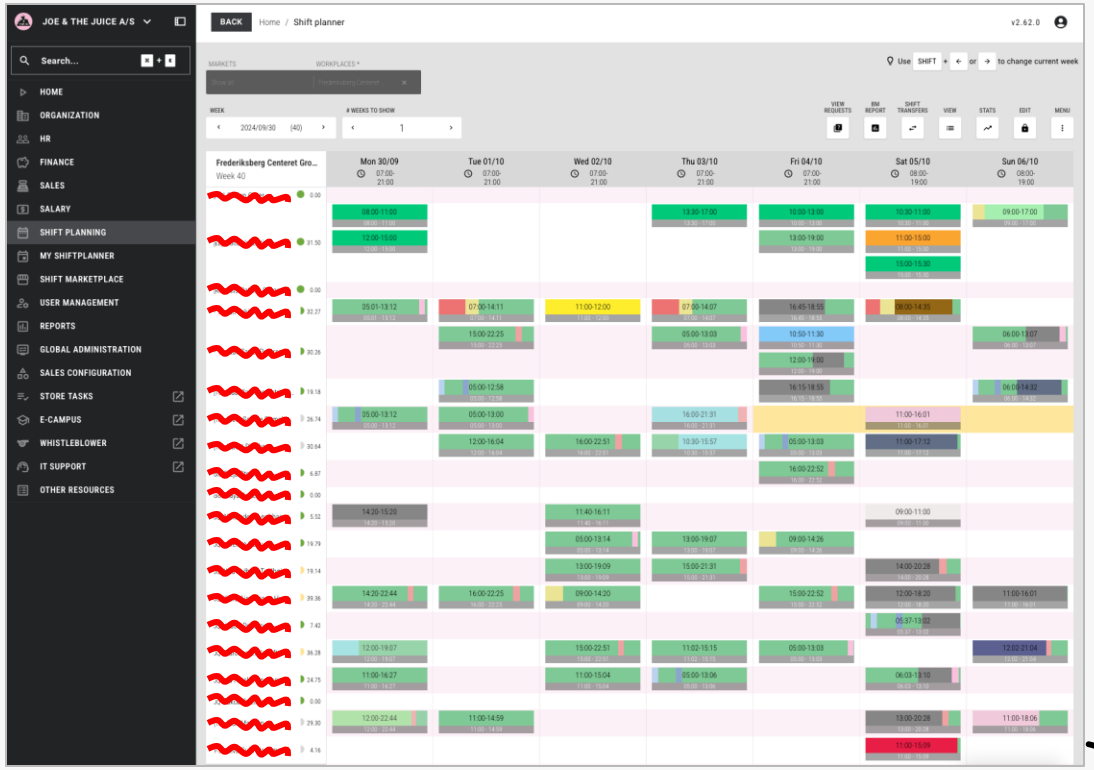
PRODUCTIVITY Productivity is a measure that allows one to understand how many products one juicer is making in an hour on shift	**SAL%** SAL% stands for Salary Percentage. Simply put, how much salary we spent to generate turnover. If we made 100k and spent 25k on salaries, then the SAL% was 25%	**M2D** from the 1st day of the month until the last executed day of the same month	**EOM/EOD/EOY** EOD – End of Day EOM – End of Month EOY – End of Year	**CWT** Orders send out within "Correct Waiting Time" If we made 100 products and 75 of them were made on time the CWT is 75%	**HIT RATIOS** Hit Ratios are a measure that lets us see what percentage of a shift-plan in a store or market is understaffed (blue), overstaffed (red) or optimally staffed (grey)
STORE SALARY Store Salary is a Cost Center assosciated with all the staffing costs needed to ensure the store operations	**OH HOURS** OH hours are shifts, or parts of shifts that are assigned to a store but their cost is not allocated to the Store Salary cost center	**ON TOP HOURS** On Top Hours are often assosciated with OH hours. They are shifts or parts of shifts that are in the shift plan that do not count into the productivity of the store	**SOM TARGET** The SOM target is the turnover forecast that is prepared before the start of each month. This allows us to preciesly forecast the number of hours that should be used during that month	**OPTIMAL HOURS** Optimal hours will not be colored with green, blue and red as the number of man hours used during the specific hour was perfectly in line with the numbers of executed products	**TAGS** Shiftplan Tags help us visualise a certain area of responsibility, task or activity happening in the store

INTRODUCTION TO SHIFTPLANNING

WP2: SHIFTPLANNING

The must-knows of shiftplanning

WHERE TO GO FOR SHIFT PLANNING



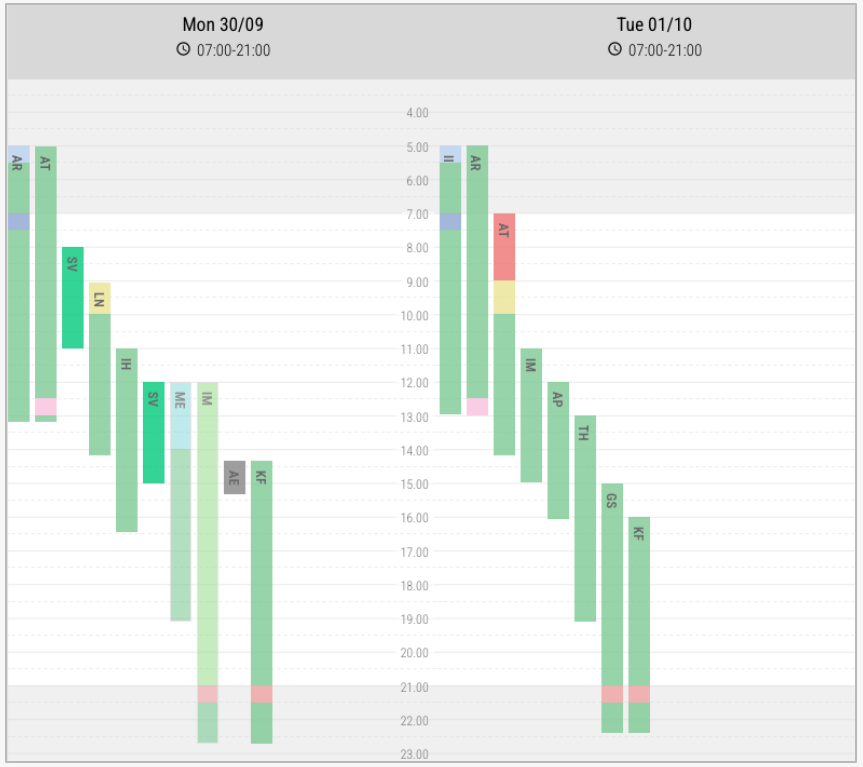
EDIT

Press edit lock to make adjustments

VERTICAL VIEW

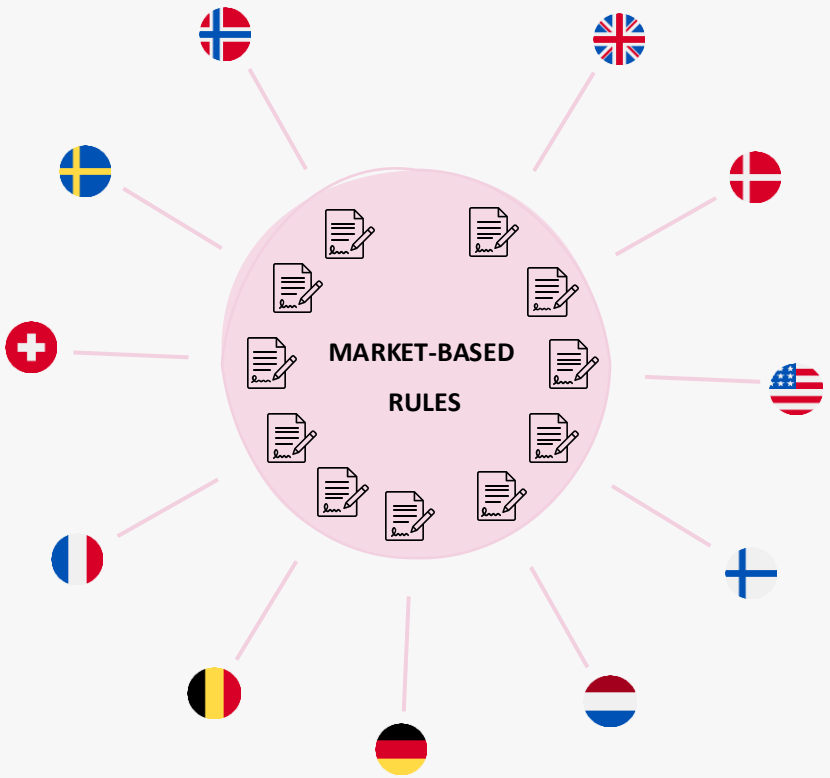
VIEW

Press View button to access vertical view



INTRODUCTION TO COUNTRY REGULATIONS

Denmark



Shiftplanning policies across all markets

Regardless of store and market, the shiftplan needs to apply to following rules:

- *The minimum shift length is 4 hours.*
- *All shifts have a 15-minute paid break.*
- *Eligible employees should not be scheduled for more than 40 hours per week. Any hours worked beyond 40 will be paid overtime at 1.5 times the regular rate.*
- *The schedule must be finalized by the 1st of each month, two months in advance.*
- *All time-off requests must be submitted by the 15th of the month, two months in advance. Example: A request for time-ff in May must be requested and approve by March 15th.*
- *No one is allowed to work 7 days in 1 week (Monday-Sunday).*

NY

Shiftplanning policies in NY

- *Changes to the shift plan are only allowed a minimum of 14 days in advance. If changes are made less than 14 days before the scheduled shift, an adjustment premium must be applied. Under no circumstances can scheduled hours be removed.*
- *There must be a minimum of 11.5 hours of rest between shifts from one day to the next. If an employee has less than 11 hours between shifts, a clopen premium will be applied.*
- *A workday must not exceed 9.5 hours. If a workday reaches 10 hours or more, a premium will be applied.*
- *If a shift is 6 hours or longer, a 30-minute unpaid break must be scheduled and taken.*

INTRODUCTION TO COUNTRY REGULATIONS

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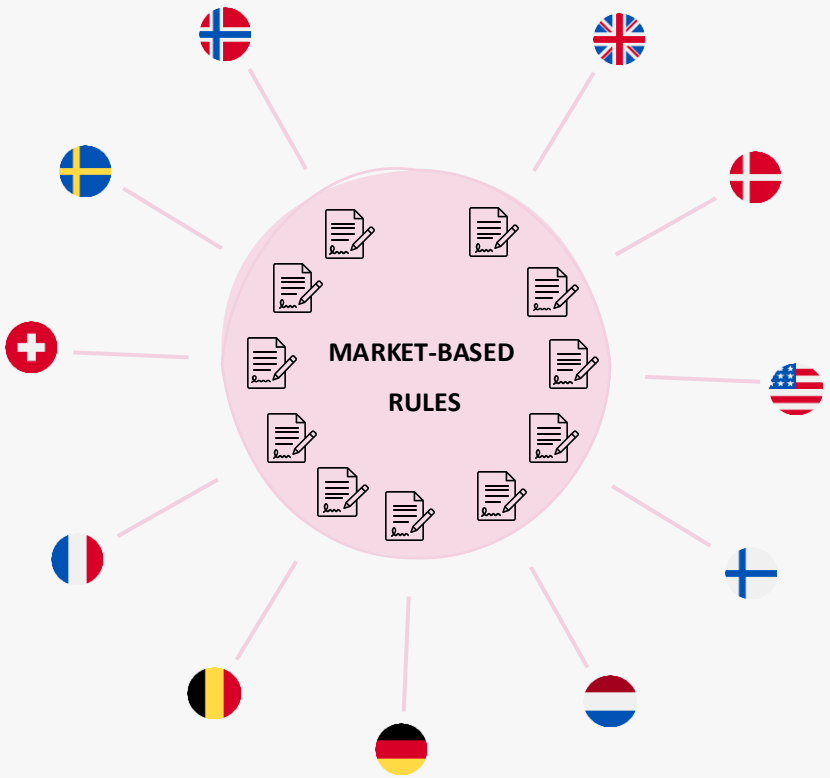

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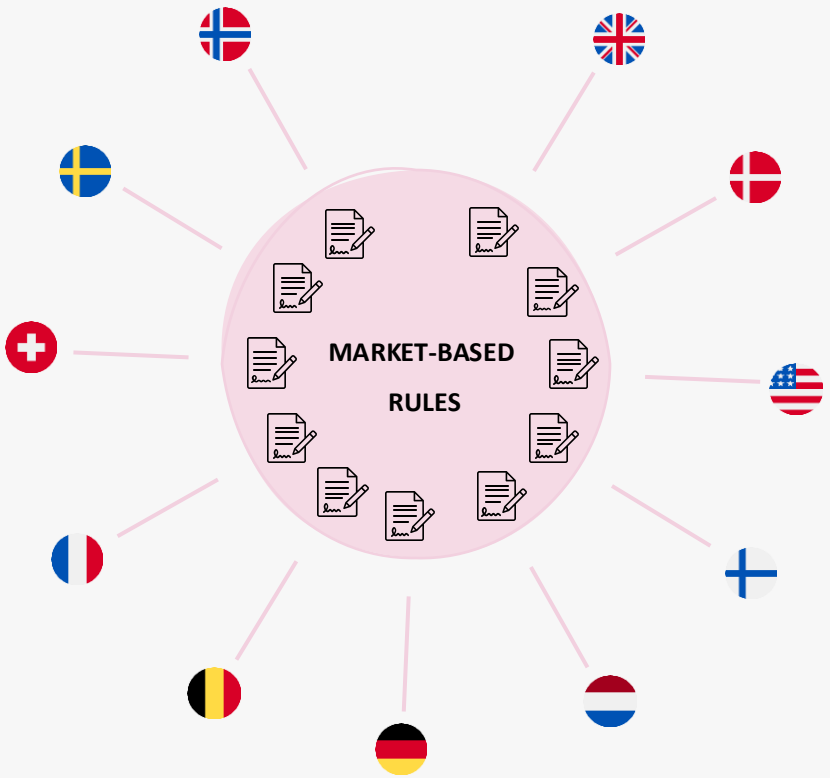
ILL

Shiftplanning policies in ILL

- *Changes to the shift plan are only allowed a minimum of 14 days in advance. If changes are made less than 14 days before the scheduled shift, an adjustment premium must be applied. Under no circumstances can scheduled hours be removed.*
- *There must be a minimum of 11.5 hours of rest between shifts from one day to the next. If an employee has less than 11 hours between shifts, a clopen premium*
- *If an employee clocks out more than 15 minutes after their shift ends due to additional work, a predictability premium will be applied.*

INTRODUCTION TO COUNTRY REGULATIONS

Denmark



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DC

Shiftplanning policies in DC

- *The minimum shift length is 4 hours*
- *Employees should not be scheduled for more than 40 hours per week. Any hours worked beyond 40 will be paid at 1.5 times the regular rate.*
- *Changes to the shift plan are only allowed a minimum of 14 days in advance. Under no circumstances can scheduled hours be removed.*

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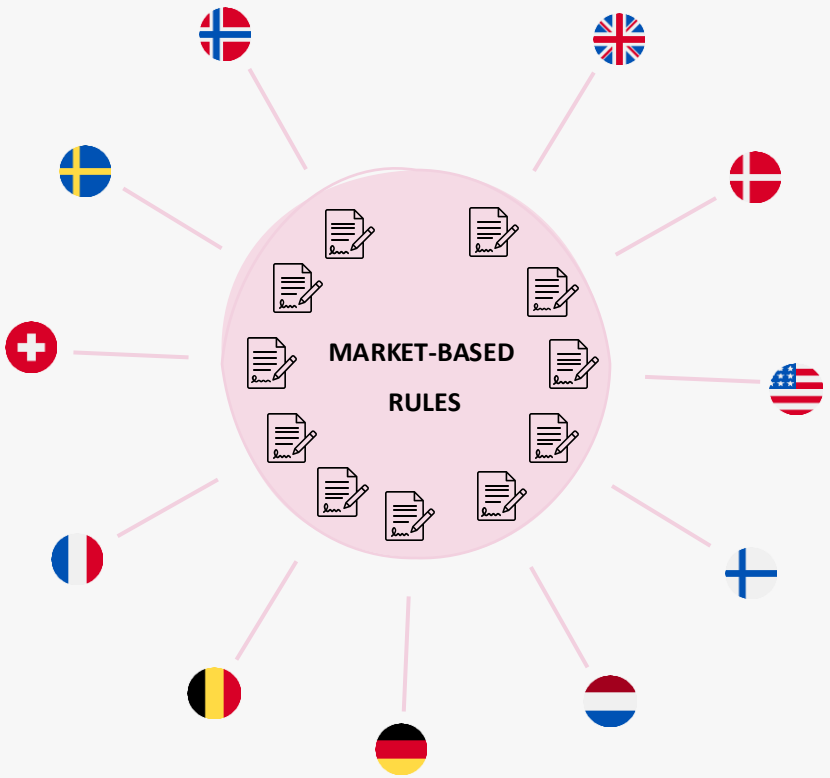

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SEA

Shiftplanning policies in SEA

- *The minimum shift length is 4 hours*
- *Employees should not be scheduled for more than 40 hours per week. Any hours worked beyond 40 will be paid at 1.5 times the regular rate.*
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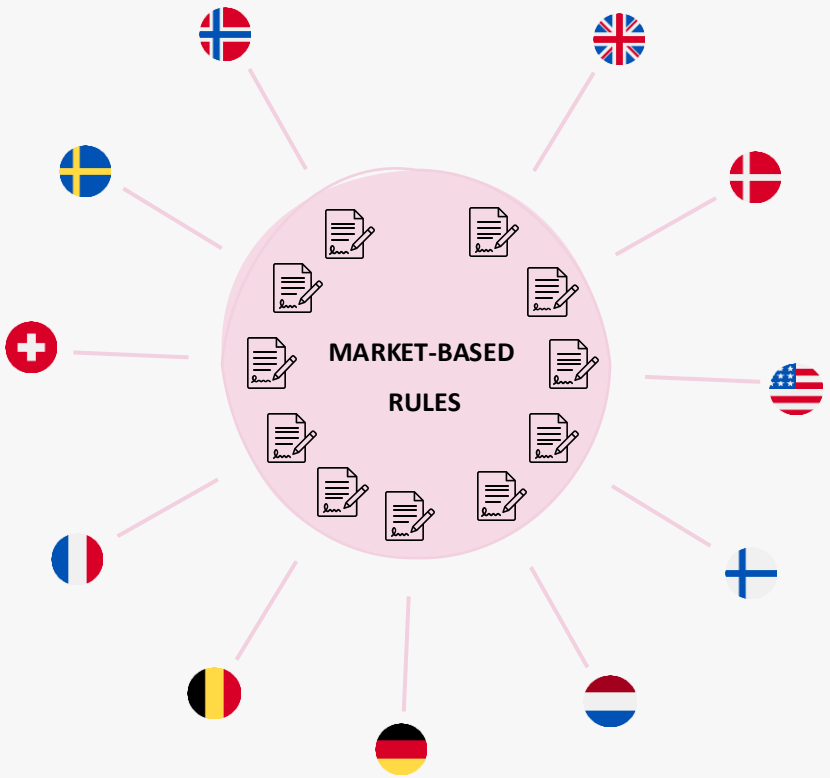

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- *No one is allowed to work 7 days in 1 week (Monday-Sunday).*

SEA

Shiftplanning policies in SEA

- *There must be a minimum of 10.5 hours of rest between shifts from one day to the next. If an employee has less than 10 hours between shifts, a clopen premium will be applied.*
- *If a shift is 5 hours or longer, a 30-minute unpaid break must be scheduled and taken.*
- *Changes to the shift plan are only allowed a minimum of 14 days in advance. Under no circumstances can scheduled hours be removed.*

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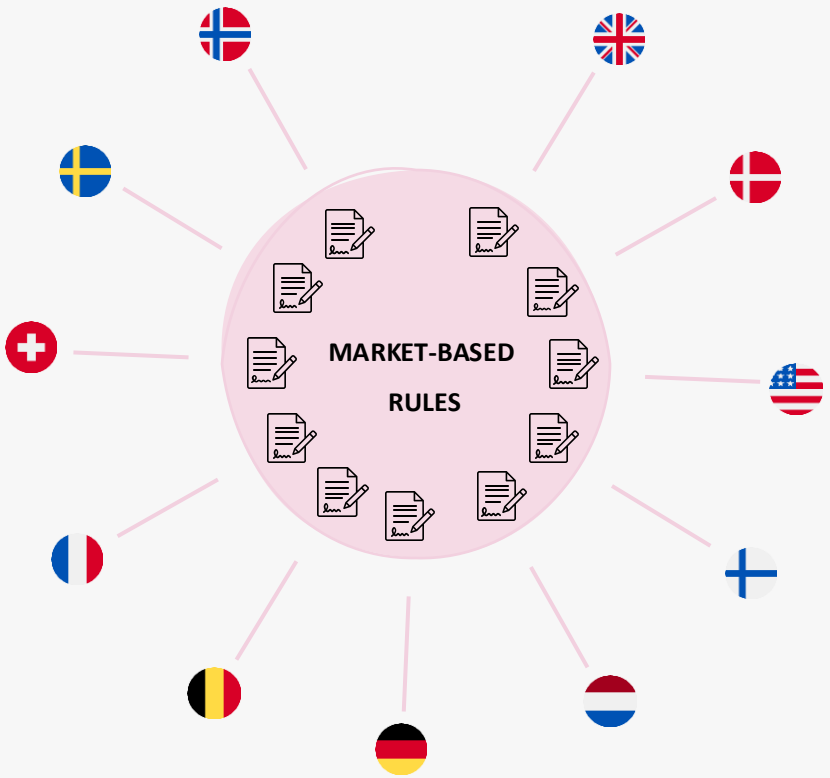

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- *No one is allowed to work 7 days in 1 week (Monday-Sunday).*

SFO

Shiftplanning policies in SFO

- *If a shift is 6 hours or longer, a 30-minute unpaid break must be scheduled and taken. The break must be executed before the 5th hour of the shift. If the break is missed, less than 30 minutes or executed later than the 5th hour of work, a premium will be applied.*
- *A workday must not exceed 8 hours. Employees are entitled to overtime pay if they work more than 8 hours.*
- *Changes to the shift plan are only allowed a minimum of 14 days in advance. If changes are made less than 14 days before the scheduled shift, an adjustment premium must be applied. Under no circumstances can scheduled hours be removed. If changes are made within 24 hours an additional premium will be applied.*
- *An employee may not be scheduled to work alone for more than 3.5 hour. If so, a premium must be applied*
- *Any hours worked beyond 12 hours in a workday must be paid at double.*

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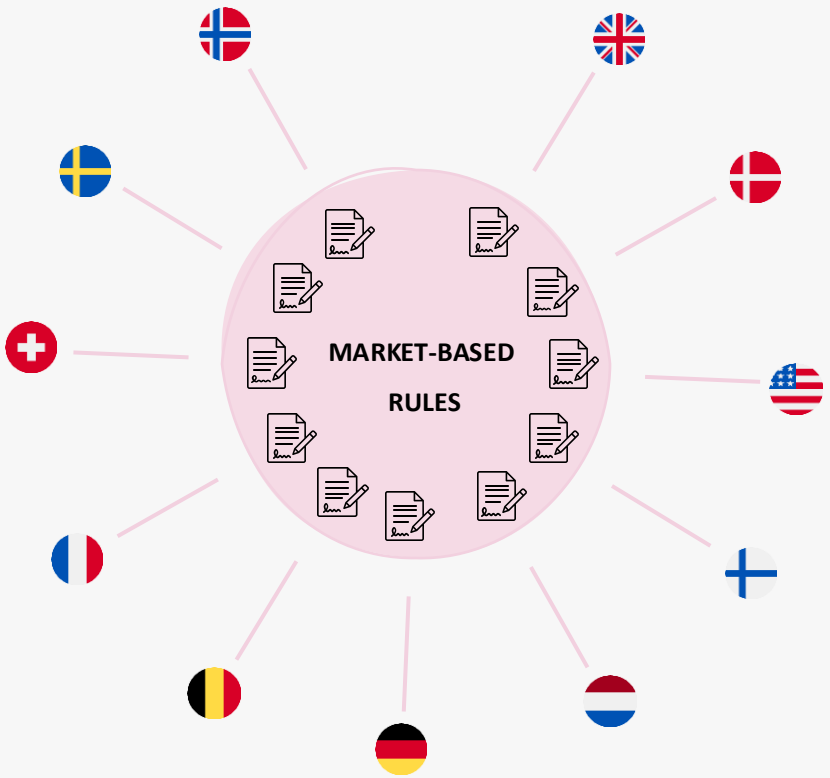

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LA

Shiftplanning policies in LA

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- *A workday must not exceed 8 hours. Employees are entitled to overtime pay if they work more than 8 hours.*
- *Changes to the shift plan are only allowed a minimum of 14 days in advance. If changes are made less than 14 days before the scheduled shift, an adjustment premium must be applied. Under no circumstances can scheduled hours be removed.*
- *An employee may not be scheduled to work alone for more than 3.5 hour. If so, a premium must be applied*
- *There must be a minimum of 10,5 hours of rest between shifts from one day to the next. If an employee has less than 10 hours between shifts, a clopen premium will be applied.*
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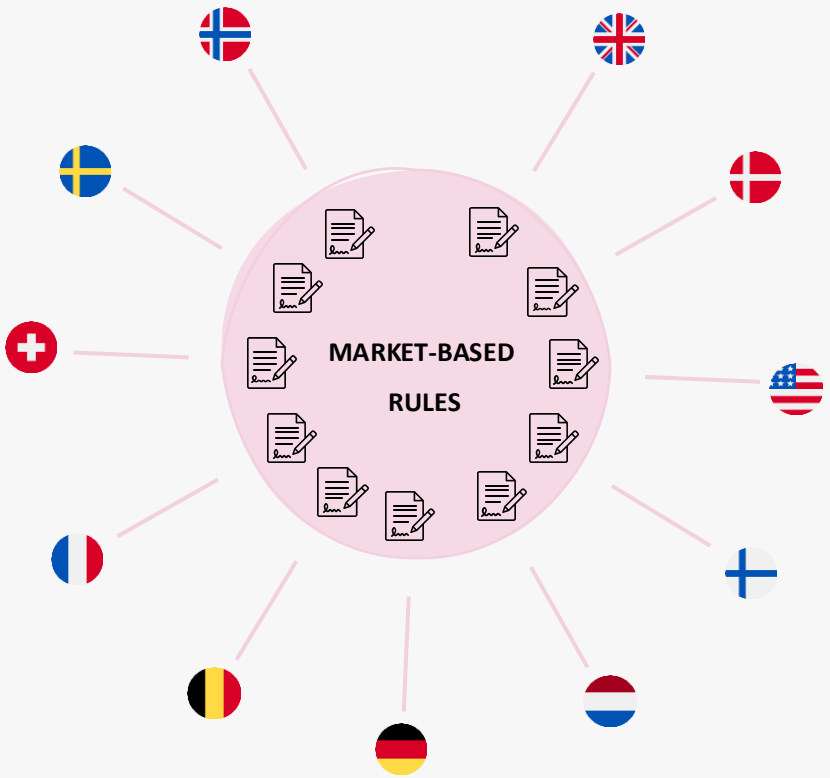

Shiftplanning policies across all markets

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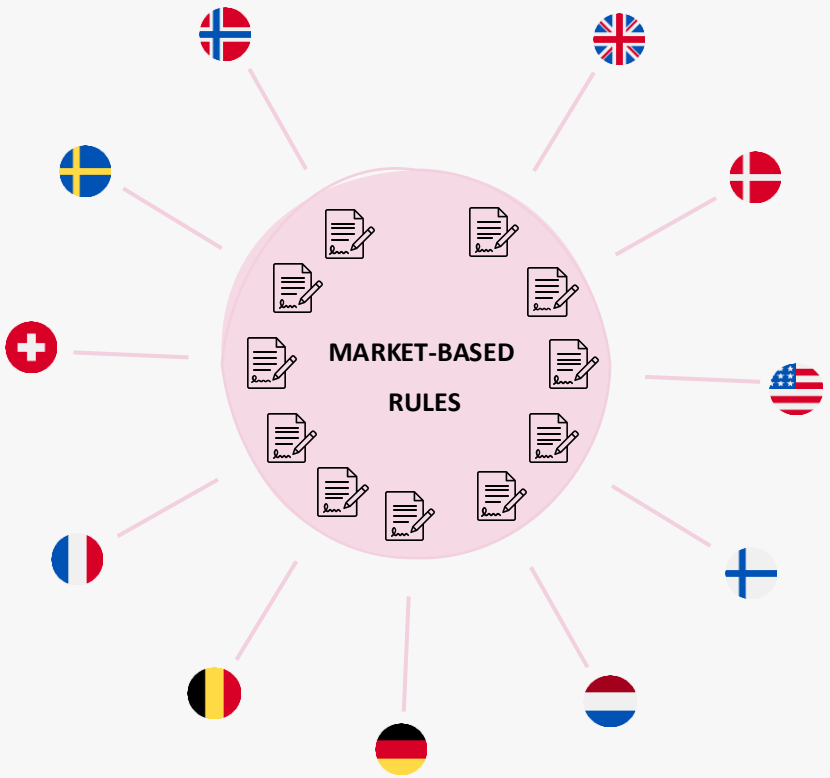

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SD

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- *A workday must not exceed 8 hours. Employees are entitled to overtime pay if they work more than 8 hours.*
- *Any hours worked beyond 12 hours in a workday must be paid at double.*
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- *Changes to the shift plan are only allowed a minimum of 14 days in advance. If changes are made less than 14 days before the scheduled shift, an adjustment premium must be applied. Under no circumstances can scheduled hours be removed.*

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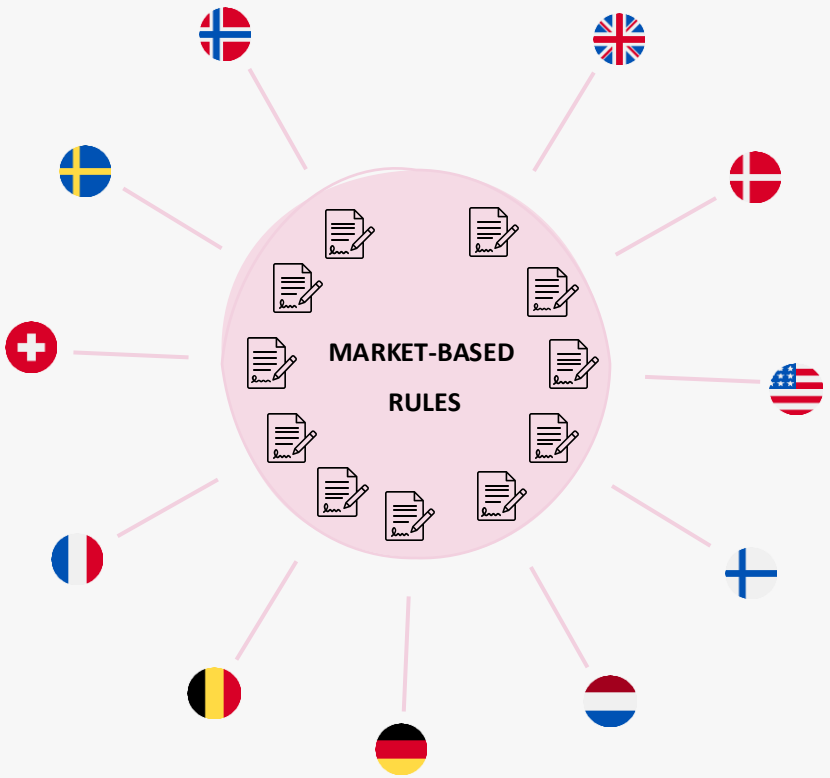

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MN

Shiftplanning policies in Minneapolis

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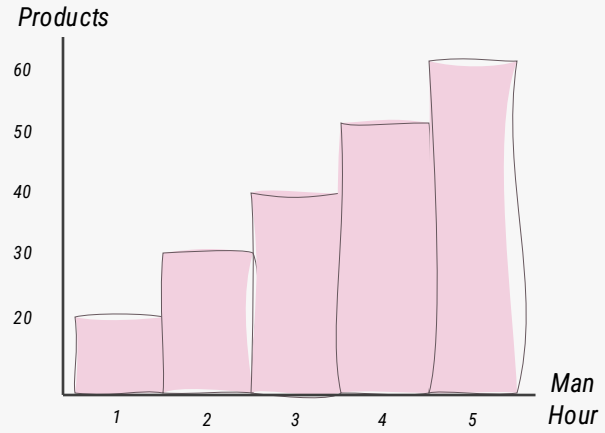
SHIFTPLANNING GRIDS

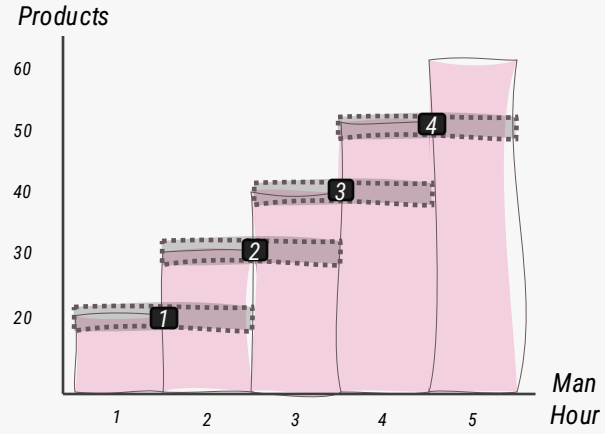
The origin the shiftplanning stats

Audit Grids

Legacy Grid



Audit Grid



***Note**: Only used in US & UK*

WP2 Example

Employees	Minimum	Maximum	Optimal	Minimum (Audit range)	Maximum (Audit range)
Search..	Search..	Search..	Search..	Search..	Search..
1	0	23	17	0	23
2	24	45	40	24	45
3	46	90	79	46	90
4	91	131	121	91	131
5	132	153	148	132	153
6	154	171	167	154	171
7	172	194	189	172	194
8	195	234	225	195	234
9	235	275	265	235	275
10	276	315	305	276	315
11	316	356	346	316	356
12	357	396	386	357	396
13	397	437	427	397	437
14	438	477	467	438	477
15	478	518	508	478	518

[CHECKOUT ALL SHIFTPLANNING GRIDS]

Click me

Grid Adjustments

The local Operational Planner is in charge of ensuring that the store is paired up with the correct Shiftplan Grid.

Before changing to a new grid, they will get approval from the Market Manager after assessing:

- ***Market standards***
- ***Low Seniority***

HIT RATIO – DIFFERENCE IN COLORS

Four different categories which offers insights on effectiveness of planning

Too Slow

Too many employees on shift

When the store doesn't surpass the minimum weighted products in the grid

Optimal

Indicates that the store is staffed ideally

"Close" being too busy

Indication that the hour is close to being on max capacity

Optimal ← In between → *Too Busy*

Too Busy

Indicates that the store is above max capacity

When store surpasses the maximum weighted products in the grid

SHIFTPLANNING TAGS

Shiftplan Tags help us visualise a certain area of responsibility, task or activity happening in the store

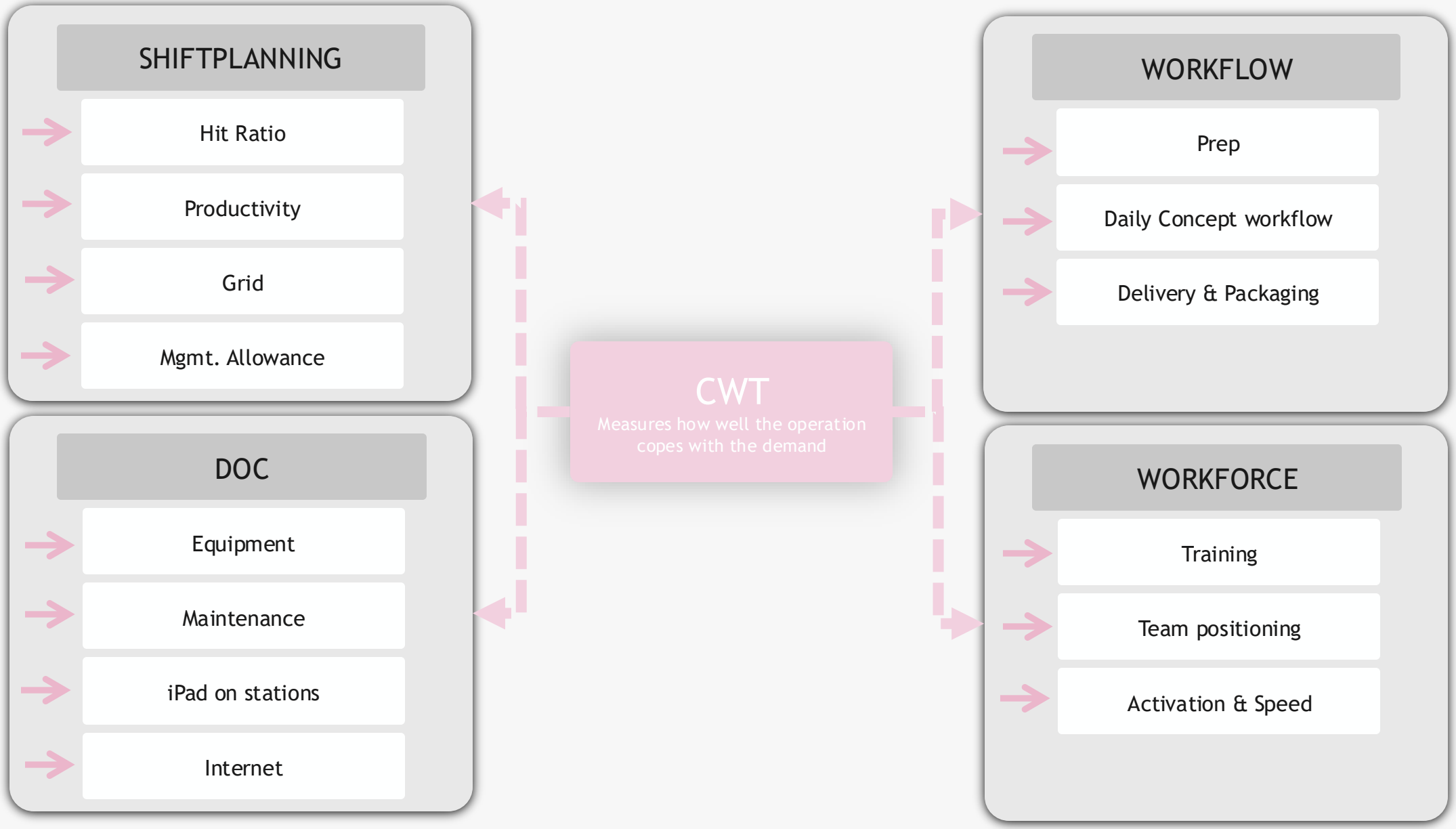
Example

TAG	INCLUDED IN PRODUCTIVITY?	"COST CENTER"	DESCRIPTION
Admin	NO	Store Salary	This tag is used to do admin tasks, however the salary is still paid out of the store salary
Break	NO	Store Salary	We use this tag to show when a juicer is supposed to take a break. They are not making products during the break, but their salary is still paid out from the Store Salary bucket.
Till Captain	YES	Store Salary	We use this tag for team positioning and ensuring a juicer understand what their role is during the day.
Shift-Change Re-stock	NO	Store Salary	We use these tags to dedicate time for crucial DCWF tasks during the day. Be aware that they are part of the store cost – so they might result in less hours for the remaining of the day

Remember: Some tags are mandatory, some tags are very useful, and some tags might not be relevant for your store!

DEEP DIVE: CORRECT WAITING TIME

Indicator of how Operation is coping with the demand



EXERCISE: Sit together ASTM & STM for 10 mins:

Brainstorm the below scenario

You are a STM of a high revenue store. You see that every Saturday the Waiting Time goes down after the lunch rush, especially during shift swap.

The stats say that the staffing has been optimal during every hour of the day.

What could be the reasons for the Waiting Time going up?

HOW TO INTERPRET DATA IN THE SHIFT PLANNING STATS

Four key data points to analyse & **today's first exercise**

M.H. (Man Hours)

The number of Juicers that were on the shiftplan for the given hour

O.H. (Optimal hours)

The number of Juicers that were supposed to be on the shiftplan to reach an "optimal" hour

AWT (Average Waiting Time)

The total time our guest is waiting in average for their order (Order is placed ←→ Order is received and tapped out on the List)

W.P. (Weighted Products)

Number of sold products based on the complexity level
(Water = 0.1 /Juice = 1 / Sandwich = 1.3)

Select height: ORIGINAL | 33% | 66% | 100%

2024/10/07 (41) | HOURLY | HALF HOURLY | DEFAULT | AUDIT

WEEK	MONDAY				TUESDAY				WEDNESDAY				THURSDAY				FRIDAY				SATURDAY				SUNDAY			
WORKPLACE	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.
7:00 - 8:00	1,5	1	5,0	13	1,5	1	2,2	14	1,5	1	2,5	18	1,5	1	3,9	20	1,5	1	4,5	11								
8:00 - 9:00	2,0	1	3,0	14	2,0	2	2,4	37	2,0	2	4,5	34	2,0	2	2,2	35	2,0	1	3,4	21	1,5	1	2,0	14	1,5	1	5,0	16
9:00 - 10:00	2,0	2	3,0	52	2,0	2	3,1	38	2,0	1	4,1	28	2,0	2	3,3	50	2,0	2	4,2	47	2,0	2	5,7	41	2,0	2	4,2	37
10:00 - 11:00	3,0	3	5,3	93	3,0	3	3,7	64	3,0	2	2,3	46	3,5	2	4,8	54	3,0	3	3,2	57	3,0	3	3,1	89	3,0	3	3,7	66
11:00 - 12:00	4,0	3	4,8	107	4,0	4	5,7	116	4,3	4	5,8	116	5,0	4	4,9	128	4,0	4	7,0	148	6,0	6	4,0	191	5,0	3	2,9	89
12:00 - 13:00	5,5	4	6,6	147	4,5	4	8,5	142	4,5	4	5,3	149	4,5	4	5,4	117	4,5	5	5,9	173	6,5	8	6,4	245	6,4	5	3,9	166
13:00 - 14:00	4,4	4	6,8	116	4,0	3	5,9	105	4,3	4	5,2	138	4,2	4	7,5	149	4,1	4	4,5	129	6,2	8	8,8	254	6,1	6	5,3	196
14:00 - 15:00	4,5	3	9,8	85	3,2	3	5,1	90	3,3	3	3,1	104	3,1	4	5,2	127	3,4	4	4,2	123	6,6	5	6,3	181	5,5	5	8,7	185
15:00 - 16:00	4,3	3	10,2	93	3,0	3	5,6	85	3,1	3	4,0	89	3,2	3	6,1	83	3,0	3	5,0	107	5,2	4	6,4	133	5,0	4	6,8	113
16:00 - 17:00	3,5	3	6,8	93	3,1	3	5,0	87	3,2	3	5,3	93	3,0	3	3,8	101	5,0	3	3,3	76	4,0	3	4,3	75	4,0	3	5,8	76
17:00 - 18:00	3,0	3	10,1	67	3,0	3	4,9	72	3,0	3	9,6	94	3,0	3	4,2	82	6,0	2	3,2	51	3,2	2	5,2	49	3,0	2	4,1	47
18:00 - 19:00	3,0	3	14,0	82	3,0	3	4,6	64	3,0	3	5,3	83	3,0	3	4,9	77	5,8	11	2,5	395	2,3	2	5,5	52	2,1	2	6,4	33
19:00 - 20:00	2,1	1	8,3	24	2,1	2	5,5	33	2,2	2	6,7	52	2,1	2	4,0	48	2,0	2	2,8	29								
20:00 - 21:00	2,0	1	3,9	8	2,0	1	3,4	18	2,0	1	2,7	13	2,0	1	4,8	19	2,0	1	5,1	17								

Issues or feedback?

Optimal Planning

10 minute exercise

Which day of the week above is in your opinion planned in the most optimal way & why?

HOW TO SPOT A ”RED THREAD?”

Example: Week 37 *Magasin Kgs. Nytorv, Denmark*

Select height: ORIGINAL | 33% | 66% | 100%

2024/09/09 (37) | HOURLY | HALF HOURLY | DEFAULT | AUDIT

WEEK	MONDAY				TUESDAY				WEDNESDAY				THURSDAY				FRIDAY			
WORKPLACE	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.
10:00 - 11:00	1,5	1	2,1	25	2,0	2	3,9	43	1,5	2	3,0	34	2,0	2	3,9	43	1,5	1	1,8	24
11:00 - 12:00	2,0	3	3,6	63	3,0	2	2,3	51	2,1	2	4,2	52	3,0	2	2,3	51	2,0	3	3,2	56
12:00 - 13:00	3,0	3	3,4	96	3,0	3	2,9	79	3,0	3	2,4	56	3,0	3	3,9	57	2,5	2	2,6	39
13:00 - 14:00	3,0	3	2,3	60	3,0	3	2,7	60	3,0	3	2,4	58	3,0	3	3,2	82	3,0	3	3,8	82
14:00 - 15:00	2,1	3	2,5	56	2,1	2	2,9	51	3,0	2	3,0	44	2,1	3	3,0	57	3,0	2	3,0	44
15:00 - 16:00	2,0	2	2,6	40	2,3	2	2,2	45	2,0	2	2,5	49	2,2	2	4,0	47	2,0	2	3,0	41
16:00 - 17:00	2,0	2	3,4	37	2,0	2	2,7	38	2,0	3	2,8	64	2,0	1	2,8	27	2,0	2	3,8	41
17:00 - 18:00	2,0	2	2,6	30	2,0	1	2,4	23	2,0	2	3,2	44	2,0	3	4,0	56	2,0	2	4,6	42
18:00 - 19:00	1,0	1	3,6	24	1,0	3	4,6	56	1,0	2	3,7	43	1,0	2	6,2	34	1,0	2	3,6	35
19:00 - 20:00	1,1	1	2,1	14	1,1	1	4,4	26	1,3	1	2,6	17	1,4	1	2,8	11	1,5	1	3,4	18

Let’s look at the hour between 18.00 – 19.00 // *What do we know based on the data?*

HOUR 18-19	Monday	Tuesday	Wednesday	Thursday	Friday
M.H.	*1 person*	*1 person*	*1 person*	*1 person*	*1 person*
O.H.	*1 person*	*3 person*	*2 person*	*2 person*	*2 person*
AWT	*Is higher than average of remaining hours, but not spiking up except for Thursday. However, just because the team is managing doesn’t mean that the guest experience were on point!*				
W.P.	*24 products*	*56 products*	*43 products*	*34 products*	*35 products*
Color coding	*Green (busy)*	*Blue (too busy)*	*Blue (too busy)*	*Blue (too busy)*	*Blue (too busy)*

CONCLUSION:

Invest 1x hour between 18.00 – 19.00

Monday to Friday

Salary cost: 200*5 = 1000kr

*Keep an eye on your investment the following weeks to confirm or adjust the decision

EXERCISE: Sit together ASTM & STM for 10 mins:

Step 1. *Choose your own shiftplan and analyse the previous two weeks*

Step 2. *Analyse the data available:*

→ *M.H – O.H. – AWT – W.P. & color coding*

Step 3. *Spot a red thread based on the data available*

Step 4*. Present the red thread to the group*

Note: *If no red threads can be identified, argue why that is based on the data?*

Step 5. *Based on the red thread you have found check your shiftplans for the coming two weeks and see if the red thread will continue.*

Step 6. *If you believe the red thread will continue, note what changes you would like to make.*

Step 7. *Ask the juicers whose shifts you would like to adjust for permission.*

Step 8. *If permission is received adjust the shift plan.*

HOMEWORK FOR NEXT SESSION

Dedicating time to analyse Shiftplanning Stats to ensure your store hits hit-ratios

From now on, you are responsible for making recommendations for the shiftplan to your Operational Planner!

Task 1

Analyzing the shiftplan based on today's learnings!

Step 1. *During the week, analyze the shiftplan of your store*

Step 2. *See if there are any possibilities of adjusting the staffing up/down based on the data points you see in the stats on WP2 combined with what you experience in the store*

Step 3. *Reach out to your Operational Planner with any requested adjustments to your shiftplan and write a description of why the change is beneficial for the store*

Step 4. *Receive confirmation/denial email from Operational Planner*

Step 5. *If confirmed, adjust the shiftplan accordingly*
→ Be aware of any market regulations

All participants to present their adjustments at next session

SESSION 2

“SALARY CONTROLLER”

TODAY’s AGENDA

Last session we build an analytical mindset towards shiftplanning stats

LEARNING GOALS

1. **SHIFTPLANNING STATS**
   Learn how to analyse Shiftplanning Stats

2. **BUILDING AN ANALYTICAL MINDSET**
   Learn how to create recommendations & actions based on both operational observations & data analysis

Session 2

LEARNING GOALS

1. **SALARY CONTROLLER – Key KPI’s for shiftplanning**
   Learn how to assess own shiftplan based on Revenue Target & Salary % target

2. **TAKING ACTION**
   Learn how to create sustainable recommendations which are sensible from both an operational and cost perspective

Session 3

LEARNING GOALS

1. **MAKING SENSIBLE ADJUSTMENTS**
   Making an adjustments in shiftplanning based on operational observation, analytical mindset, and Salary %

Session 4

LEARNING GOALS

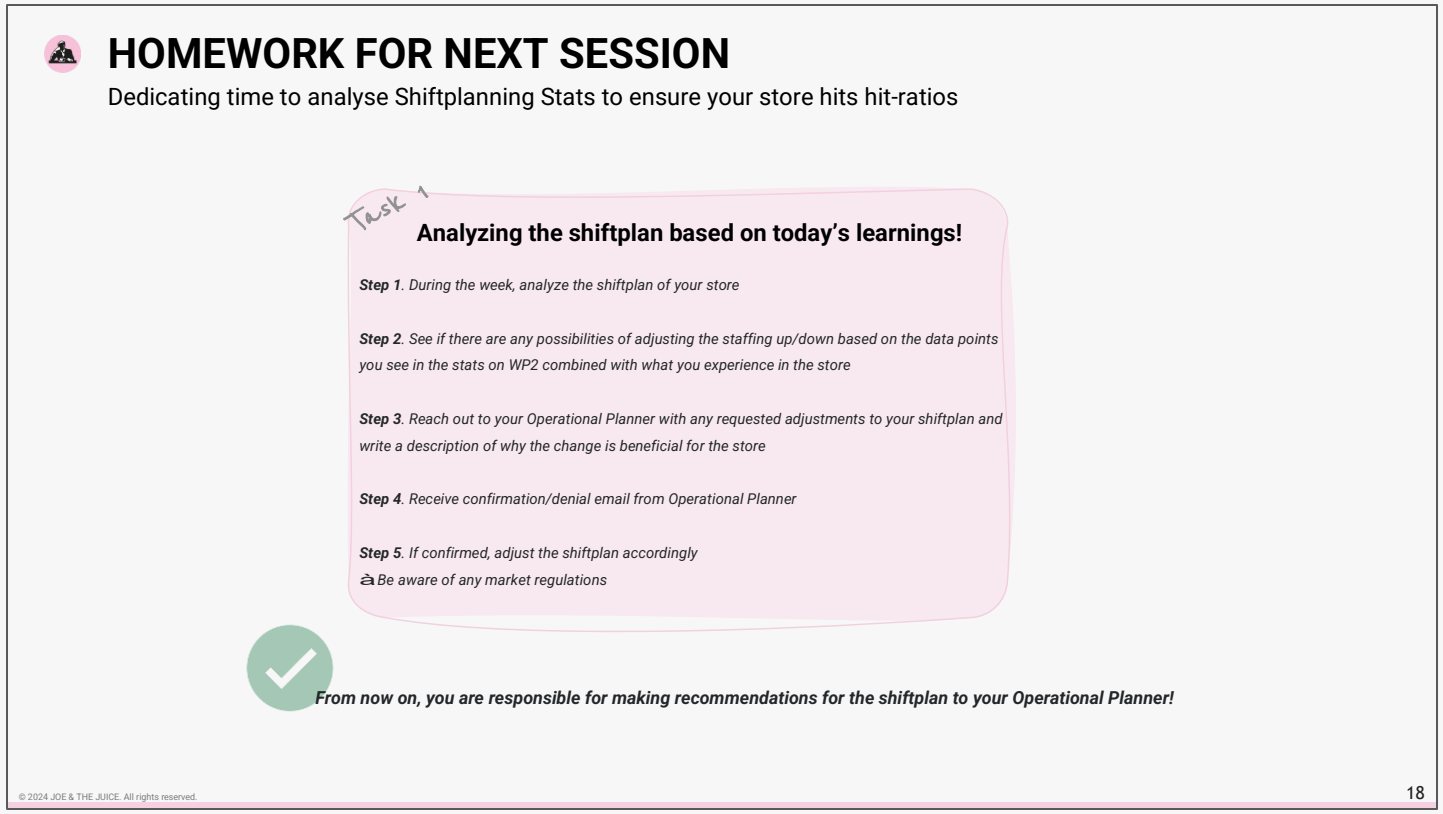
1. **UNDERSTANDING & NAVIGATING WP2 Reports**
   Identifying and navigating the relevant WP2 reports used for shiftplanning

2. **TEMPLATE CREATION**
   Learning how to create a template in advance based on the data available & the information gathered from the store

Aim is to unlock more responsibility at each session ending up with full shiftplan responsibility post session 4

HOMEWORK PRESENTATION

Did anyone make any suggested adjustments to the Operational Planner? How did it go?



THE SALARY CONTROLLER OVERVIEW

Offering great insights in how a store is performing on the key components of shiftplanning

1

Diving into the performance of various KPIs:

- *Revenue*
- *Productivity*
- *Waiting Time*
- *Salary Cost*
- *Hours*
- *Average Salary Cost*
- *Salary %*

Analysis of above measures can enlighten the correct actions needed!

2

The aim end of month is to…

- Reach Revenue Target
- Reach Salary % Target

In other words, the aim is to staff correctly – so the team is able to generate Revenue, without ”overspending” hours

This can only be achieved through great planning, data analysis and cautious corrections!

NOW: Open up the Salary Controller which has been shared with you!

Let’s dive into it!

SECTION 1 – TURNOVER / HIT RATIO & WAITING TIME

Example: Denmark

REGION in DKK	TURNOVER TARGET (SOM)	PLANNING (-3%)	EOM FC	M2D
Nordics	74.583.505	72.346.000	74.583.505	36.097.976
Other EU	34.299.182	33.270.207	34.299.182	18.501.388
UK	63.461.416	61.994.763	63.461.416	31.911.687
US	59.417.043	57.634.531	59.417.043	28.594.505
GROUP	**231.761.146**	**225.245.502**	**231.761.146**	**115.105.556**
DENMARK	**TARGET (SOM)**	**PLANNING (-3%)**	**EOM FC**	**M2D**
Magasin Aarhus [Aarhus]	687.465	666.841	687.465	354.135
Østerbrogade 48 [Copenhagen]	457.820	444.085	457.820	198.005
Fisketorvet [Copenhagen]	550.516	534.001	550.516	261.229
Skindergade 33 [Copenhagen]	398.818	386.853	398.818	191.320
Waterfront [Hellerup]	659.445	639.661	659.445	343.237
Ordrupvej 82 [Charlottenlund]	405.483	393.319	405.483	216.745
Købmagergade 30 [Copenhagen]	695.242	674.385	695.242	334.658

TURNOVER:

- SOM – The forecasted Turnover
- Planning (-3%) - 97% of the turnover, to understand what we need to plan for if we are missing turnover
- EOM – the bookkept Turnover that we receive two weeks into the succeeding month
- M2D- The Turnover executed from the 1st to the last day of the month.

REGION in DKK	HITRATIO M2D S. H.	O. H	2B. H.
Nordics	21%	62%	18%
Other EU	42%	39%	19%
UK	44%	42%	14%
US	52%	37%	12%
GROUP	**38%**	**46%**	**15%**
DENMARK	**S. H.**	**O. H**	**2B. H.**
Magasin Aarhus [Aarhus]	16%	66%	18%
Østerbrogade 48 [Copenhagen]	16%	65%	19%
Fisketorvet [Copenhagen]	21%	55%	23%
Skindergade 33 [Copenhagen]	14%	62%	23%
Waterfront [Hellerup]	19%	66%	15%
Ordrupvej 82 [Charlottenlund]	22%	67%	11%
Købmagergade 30 [Copenhagen]	22%	61%	17%

HIT RATIO:

- S.H. - slow hours (overstaffed)
- O.H. - optimal hours
- 2B.H. - too busy hours (understaffed)

REGION in DKK	WAITING TIME CWT	AVG. WT	TAP-OUT
Nordics	65%	3,6	3%
Other EU	62%	3,3	2%
UK	69%	3,3	4%
US	59%	3,5	3%
GROUP	**65%**	**3,4**	**3%**
DENMARK	**CWT**	**AVG. WT**	**TAP-OUT**
Magasin Aarhus [Aarhus]	68%	3,6	3%
Østerbrogade 48 [Copenhagen]	74%	3,2	7%
Fisketorvet [Copenhagen]	79%	3,3	3%
Skindergade 33 [Copenhagen]	75%	3,5	4%
Waterfront [Hellerup]	66%	3,9	1%
Ordrupvej 82 [Charlottenlund]	67%	3,9	5%
Købmagergade 30 [Copenhagen]	67%	4,0	3%

WAITING TIME:

- CWT – how often are the orders in the store on time?
- AVG. WT – average waiting time
- TAP-OUT – how many products are tapped out within 15 seconds of ordering?

SECTION 2 – SALARY / HOURS / PRODUCTIVITY

Example: Denmark

REGION in DKK	SALARY				
	TARGET	PLAN	SOM	EOM	M2D
Nordics	20.661.389	20.041.547	20.334.737	20.349.775	10.134.174
Other EU	8.432.118	8.179.155	9.405.578	9.511.324	4.574.584
UK	15.403.035	15.047.056	16.098.085	16.164.568	7.757.767
US	13.251.429	12.853.886	13.145.702	13.267.073	6.413.995
GROUP	**57.747.971**	**56.121.644**	**58.984.102**	**59.292.739**	**28.880.520**
DENMARK	**TARGET**	**PLAN**	**SOM**	**EOM**	**M2D**
Magasin Aarhus [Aarhus]	189.302	183.623	178.415	179.430	88.027
Østerbrogade 48 [Copenhagen]	160.490	155.675	154.246	150.724	76.091
Fisketorvet [Copenhagen]	166.508	161.513	160.091	155.379	73.978
Skindergade 33 [Copenhagen]	125.401	121.639	126.156	123.129	62.597
Waterfront [Hellerup]	224.776	218.032	223.085	226.042	110.736
Ordrupvej 82 [Charlottenlund]	130.817	126.893	143.912	141.834	71.251
Købmagergade 30 [Copenhagen]	172.285	167.116	179.702	180.321	90.962

SALARY:

- **Target –** how much money you should be spending on your shift plans
- **M2D –** how much money was spent on the shiftplans from the first to the last executed day of the month.

HOURS:

- **Target** - How many hours you need to have on your shiftplan to reach the SAL% target based on the forecasted SOM.
- **Plan -** How many hours you need to have on your shiftplan to reach the SAL% target based on the reduced forecasted SOM.
- **Plan DIF / TAR vs EOM** - the difference between your planning and the targets. Use plan dif to plan defensively.

REGION in DKK	HOURS					
	TARGET	PLAN	SOM	EOM	PLAN DIF	TAR vs EOM
Nordics	112.387	109.015	111.221	110.973	1.957	-1.414
Other EU	54.599	52.961	61.657	61.944	8.982	7.344
UK	110.344	106.067	116.339	115.745	9.679	5.401
US	87.401	84.779	88.448	87.508	2.729	107
GROUP	**364.732**	**352.822**	**377.665**	**376.170**	**23.348**	**11.438**
DENMARK	**TARGET**	**PLAN**	**SOM**	**EOM**	**PLAN DIF**	**TAR vs EOM**
Magasin Aarhus [Aarhus]	939	911	918	922	7	-16
Østerbrogade 48 [Copenhagen]	793	770	784	763	14	-30
Fisketorvet [Copenhagen]	829	804	805	795	1	-34
Skindergade 33 [Copenhagen]	628	609	647	631	38	3
Waterfront [Hellerup]	1.121	1.087	1.125	1.142	37	21
Ordrupvej 82 [Charlottenlund]	659	639	720	712	80	53
Købmagergade 30 [Copenhagen]	884	857	927	928	69	44

REGION in DKK	PRODUCTIVITY				
	TARGET	SOM	EOM	M2D	FUELED
Nordics	16,0	16,2	16,2	16,0	17,0
Other EU	14,6	12,9	12,9	14,6	14,7
UK	14,5	13,8	13,9	14,7	13,4
US	13,3	13,1	13,3	12,9	12,4
GROUP	**14,7**	**14,2**	**14,3**	**14,7**	**15,8**
DENMARK	**TARGET**	**SOM**	**EOM**	**M2D**	**FUELED**
Magasin Aarhus [Aarhus]	17,7	18,1	18,0	19,7	21,7
Østerbrogade 48 [Copenhagen]	16,1	16,3	16,7	15,0	15,0
Fisketorvet [Copenhagen]	17,3	17,8	18,0	15,6	17,4
Skindergade 33 [Copenhagen]	16,6	16,1	16,5	15,2	16,2
Waterfront [Hellerup]	17,2	17,1	16,9	17,8	18,7
Ordrupvej 82 [Charlottenlund]	16,9	15,4	15,6	15,4	15,8
Købmagergade 30 [Copenhagen]	18,7	17,9	17,8	17,5	19,3

PRODUCTIVITY:

- **Target** – The productivity you need to perform at to reach the target sal%
- **M2D** – The nominal productivity from the first to the last completed day of the month
- **Fueled** – The weighted productivity, where each product has a different value

SECTION 3 – AVG. SALARY / SALARY %

Example: Denmark

REGION in DKK	AVG. SALARY TARGET	SOM	EOM	M2D
Nordics	183,8	182,8	183,4	177,9
Other EU	154,4	152,5	153,5	163,3
UK	139,6	138,4	139,7	140,5
US	151,6	148,6	151,6	152,3
GROUP	**158,3**	**156,2**	**157,6**	**158,4**
DENMARK	**TARGET**	**SOM**	**EOM**	**M2D**
Magasin Aarhus [Aarhus]	201,6	194,4	194,5	194,0
Østerbrogade 48 [Copenhagen]	202,3	196,7	197,5	197,3
Fisketorvet [Copenhagen]	200,9	198,9	195,5	193,5
Skindergade 33 [Copenhagen]	199,7	195,1	195,1	195,0
Waterfront [Hellerup]	200,5	198,4	198,0	197,3
Ordrupvej 82 [Charlottenlund]	198,5	200,0	199,2	197,7
Købmagergade 30 [Copenhagen]	195,0	194,0	194,4	194,9

AVG. SALARY:

- **Target** - the targeted average salary based on the last few weeks
- **M2D** – the average salary from the 1st to the last executed day of the month

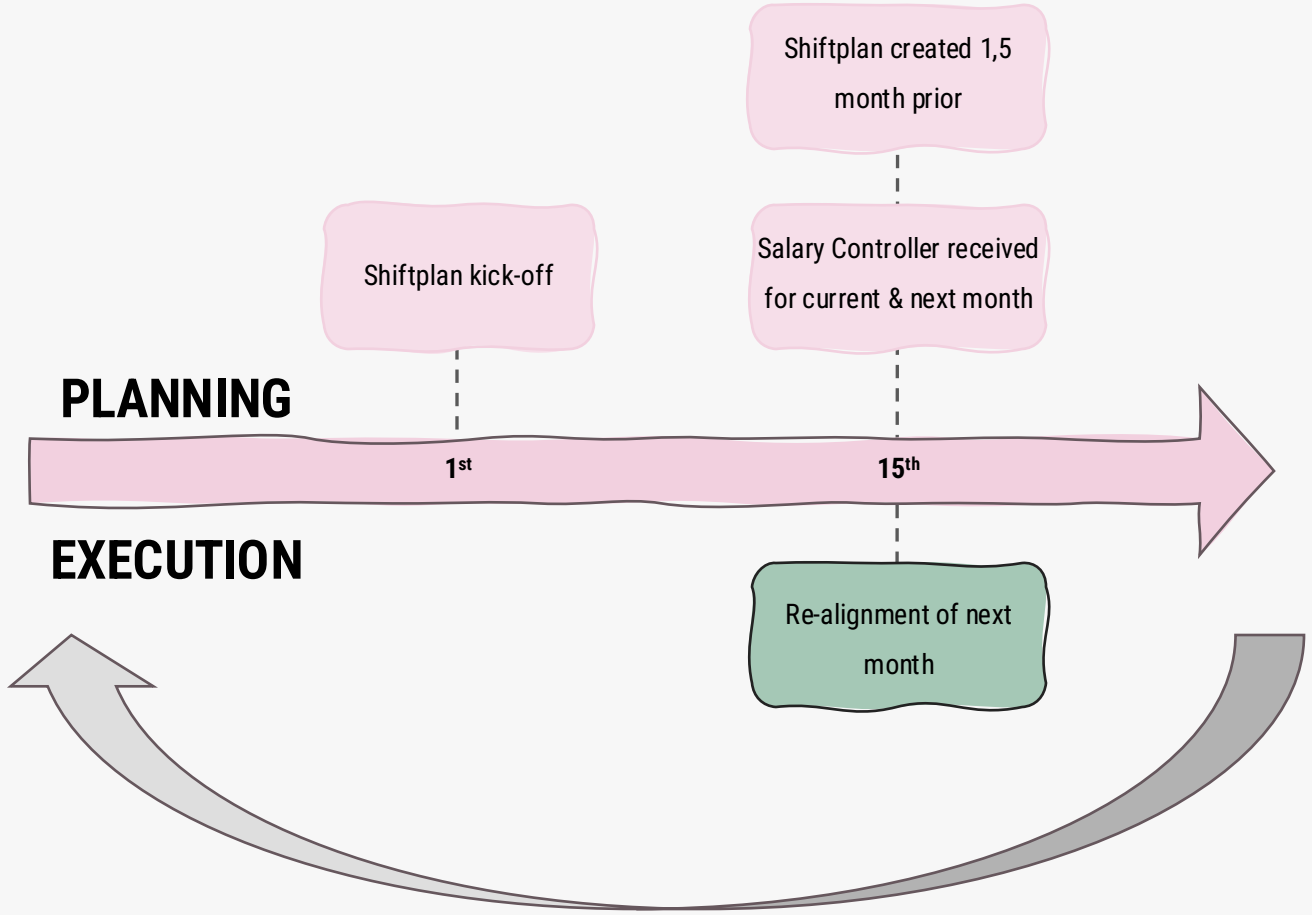
REGION in DKK	SALARY% TARGET	PLAN (-3%)	SOM	EOM	M2D	TAR vs M2D
Nordics	27,7%	27,7%	27,3%	27,3%	28,1%	0,4%
Other EU	24,6%	24,6%	27,4%	27,7%	24,7%	0,1%
UK	24,3%	24,3%	25,4%	25,5%	24,3%	0,0%
US	22,3%	22,3%	22,1%	22,3%	22,4%	0,1%
GROUP	**24,9%**	**24,9%**	**25,5%**	**25,6%**	**25,1%**	**0,2%**
DENMARK	**TARGET**	**PLAN (-3%)**	**SOM**	**EOM**	**M2D**	**TAR vs M2D**
Magasin Aarhus [Aarhus]	27,5%	27,5%	26,0%	26,1%	24,9%	-2,7%
Østerbrogade 48 [Copenhagen]	35,1%	35,1%	33,7%	32,9%	38,4%	3,4%
Fisketorvet [Copenhagen]	30,2%	30,2%	29,1%	28,2%	28,3%	-1,9%
Skindergade 33 [Copenhagen]	31,4%	31,4%	31,6%	30,9%	32,7%	1,3%
Waterfront [Hellerup]	34,1%	34,1%	33,8%	34,3%	32,3%	-1,8%
Ordrupvej 82 [Charlottenlund]	32,3%	32,3%	35,5%	35,0%	32,9%	0,6%
Købmagergade 30 [Copenhagen]	24,8%	24,8%	25,8%	25,9%	27,2%	2,4%

SALARY %:

- **Target –** The targeted Salary % for your store
- **EOM –** the Salary % you would reach with your current planning, if you reach the targeted turnover.
- **M2D –** the Salary % your store performed since the 1st to the last completed day of the month.

WHAT ARE WE USING THE SALARY CONTROLLER FOR?

Assessing existing month & re-aligning upcoming month based on current performance & trends



Salary Controller should also be used to correct existing month but be aware of market regulations!

LOOKING AHEAD AND TAKING CAUTIOUS ACTIONS

Analyzing Hours and hold against Revenue Target to plan towards hitting the Salary % target

Re-alignment of next month

Turnover Target drives hours

Hours drive Salary percentage

REGION in DKK	TURNOVER TARGET (SOM)	TURNOVER PLANNING (-3%)	TURNOVER EOM FC	SALARY TARGET	SALARY PLAN	SALARY SOM	SALARY EOM	HOURS TARGET	HOURS PLAN	HOURS SOM	HOURS EOM	HOURS PLAN DIF	HOURS TAR vs EOM	PRODUCTIVITY TARGET	PRODUCTIVITY SOM	PRODUCTIVITY EOM	AVG. SALARY TARGET	AVG. SALARY SOM	AVG. SALARY EOM	SALARY% TARGET	SALARY% PLAN (-3%)	SALARY% SOM	SALARY% EOM	SALARY% TAR vs EOM
Nordics	66.585.725	64.588.153	66.585.725	18.900.766	18.333.743	18.936.430	18.945.841	102.361	99.290	103.450	103.514	4.224	1.153	15,9	15,7	15,7	184,6	183,0	183,0	28,4%	28,4%	28,4%	28,5%	0,1%
Other EU	31.569.445	30.622.361	31.569.445	7.879.744	7.643.351	9.003.679	9.003.679	51.130	49.596	59.167	59.167	9.571	8.037	14,6	12,6	12,6	154,1	152,2	152,2	25,0%	25,0%	28,5%	28,5%	3,6%
UK	63.736.025	61.823.944	63.736.025	15.712.504	15.241.129	15.453.826	15.453.826	112.254	108.886	112.489	112.489	3.602	235	14,6	14,6	14,6	140,0	137,4	137,4	24,7%	24,7%	24,2%	24,2%	-0,4%
US	53.496.589	51.891.692	53.496.589	11.970.911	11.611.784	12.459.267	12.459.267	79.072	76.700	83.392	83.392	6.692	4.320	13,1	12,4	12,4	151,4	149,4	149,4	22,4%	22,4%	23,3%	23,3%	0,9%
GROUP	**215.387.784**	**208.926.151**	**215.387.784**	**54.463.925**	**52.830.007**	**55.853.202**	**55.862.613**	**344.817**	**334.473**	**358.498**	**358.562**	**24.089**	**13.744**	**14,7**	**14,1**	**14,1**	**158,0**	**155,8**	**155,8**	**25,3%**	**25,3%**	**25,9%**	**25,9%**	**0,6%**
DENMARK	**TARGET (SOM)**	**PLANNING (-3%)**	**EOM FC**	**TARGET**	**PLAN**	**SOM**	**EOM**	**TARGET**	**PLAN**	**SOM**	**EOM**	**PLAN DIF**	**TAR vs EOM**	**TARGET**	**SOM**	**EOM**	**TARGET**	**SOM**	**EOM**	**TARGET**	**PLAN (-3%)**	**SOM**	**EOM**	**TAR vs EOM**
Magasin Aarhus [Aarhus]	643.816	624.501	643.816	177.347	172.027	181.918	181.918	884	858	938	938	80	53	18,0	17,0	17,0	200,6	194,0	194,0	27,5%	27,5%	28,3%	28,3%	0,7%
Østerbrogade 48 [Copenhagen]	412.908	400.521	412.908	144.998	140.648	142.170	142.170	721	699	727	727	27	6	16,4	16,3	16,3	201,2	195,7	195,7	35,1%	35,1%	34,4%	34,4%	-0,7%
Fisketorvet [Copenhagen]	513.358	497.957	513.358	143.716	139.405	154.332	154.332	719	698	780	780	82	61	16,3	15,0	15,0	199,8	197,9	197,9	28,0%	28,0%	30,1%	30,1%	2,1%
Skindergade 33 [Copenhagen]	400.000	388.000	400.000	128.365	124.514	111.962	111.962	646	627	577	577	-50	-69	16,7	18,7	18,7	198,6	194,0	194,0	32,1%	32,1%	28,0%	28,0%	-4,1%
Waterfront [Hellerup]	769.431	746.348	769.431	251.236	243.699	218.070	218.070	1.260	1.222	1.099	1.099	-123	-161	18,0	20,6	20,6	199,4	198,4	198,4	32,7%	32,7%	28,3%	28,3%	-4,3%
Ordrupvej 82 [Charlottenlund]	437.358	424.237	437.358	133.074	129.081	133.214	133.214	674	654	672	672	18	-2	17,5	17,6	17,6	197,4	198,2	198,2	30,4%	30,4%	30,5%	30,5%	0,0%
Købmagergade 30 [Copenhagen]	607.117	588.904	607.117	183.985	178.465	169.617	169.617	949	920	874	874	-46	-75	16,5	18,0	18,0	193,9	194,1	194,1	30,3%	30,3%	27,9%	27,9%	-2,4%

REGION in DKK	TURNOVER TARGET (SOM)	TURNOVER PLANNING (-3%)	TURNOVER EOM FC
Nordics	66.585.725	64.588.153	66.585.725
Other EU	31.569.445	30.622.361	31.569.445
UK	63.736.025	61.823.944	63.736.025
US	53.496.589	51.891.692	53.496.589
GROUP	**215.387.784**	**208.926.151**	**215.387.784**
GROUP	**215.387.784**	**208.926.151**	**215.387.784**
DENMARK	**TARGET (SOM)**	**PLANNING (-3%)**	**EOM FC**
Magasin Aarhus [Aarhus]	643.816	624.501	643.816
Østerbrogade 48 [Copenhagen]	412.908	400.521	412.908
Fisketorvet [Copenhagen]	513.358	497.957	513.358
Skindergade 33 [Copenhagen]	400.000	388.000	400.000
Waterfront [Hellerup]	769.431	746.348	769.431
Ordrupvej 82 [Charlottenlund]	437.358	424.237	437.358
Købmagergade 30 [Copenhagen]	607.117	588.904	607.117

REGION in DKK	HOURS TARGET	HOURS PLAN	HOURS SOM	HOURS EOM	HOURS PLAN DIF	HOURS TAR vs EOM
Nordics	102.361	99.290	103.450	103.514	4.224	1.153
Other EU	51.130	49.596	59.167	59.167	9.571	8.037
UK	112.254	108.886	112.489	112.489	3.602	235
US	79.072	76.700	83.392	83.392	6.692	4.320
GROUP	**344.817**	**334.473**	**358.498**	**358.562**	**24.089**	**13.744**
DENMARK	**TARGET**	**PLAN**	**SOM**	**EOM**	**PLAN DIF**	**TAR vs EOM**
Magasin Aarhus [Aarhus]	884	858	938	938	80	53
Østerbrogade 48 [Copenhagen]	721	699	727	727	27	6
Fisketorvet [Copenhagen]	719	698	780	780	82	61
Skindergade 33 [Copenhagen]	646	627	577	577	-50	-69
Waterfront [Hellerup]	1.260	1.222	1.099	1.099	-123	-161
Ordrupvej 82 [Charlottenlund]	674	654	672	672	18	-2
Købmagergade 30 [Copenhagen]	949	920	874	874	-46	-75

Example: Magasin Århus:

- 53 over planned hours
- Indicates overplanning based on Revenue Target setting for store
- **Option 1**: Revenue target is too low (compared to actual Revenue) → **Action:** Reach out to MM/DM and highlight that Revenue target is off
- **Option 2**: Planned too many hours (too optimistic in templating) → **Action:** Re-adjust template to align with the hours

GREAT PLANNING REMOVES THE NEED FOR CORRECTION

Let’s open the most recent Salary Controller and analyse some stores where the month isn’t going as planned

Correction for remaining of September made

Bremerholm
- Good CWT
- Good Hit-Ratios
- Good SAL%
- A bit of room to invest since the prod is high

Aarhus Hovedbanegaard
- Good Prod
- Good Hit Ratios
- Low SAL% (room for investment)
- Good CWT

Lyngby Storcenter
- Good Prod
- Good CWT
- Good Hit Ratios
- Good SAL%

Vestsjællands Centeret
- Good Hit Ratios
- Bad Waiting Time
- Bad Productivity
- Bad SAL%

Islands Brygge
- Bad Hit Ratios
- Understaffed
- Bad CWT
- SAL% too low

Axel Towers
- Good Turnover
- Good Productivity
- Bad CWT
- Bad SAL%
- Bad Hit Ratios

EXERCISE: ANALYZING THE SALARY CONTROLLER

Choose your own store & sit together ASTM & STM

EXECUTION

***Step 1**. Open up the most recent Salary controller*

***Step 2**. Look at the **current month** and see how it's executed by analyzing the data:*

- *Turnover*
- *Hit-Ratio*
- *Waiting Time*
- *Salary*
- *Hours*
- *Productivity*
- *Avg. Salary*
- *Salary %*

***Step 3**. Make an example of how you would request changes to the Operational Planner. It can either be adding or removing hours with the aim of hitting the Salary %*

EXERCISE: ANALYZING THE SALARY CONTROLLER

Choose your own store & sit together ASTM & STM

PLANNING

***Step 1**. Open the most recent Salary controller*

***Step 2**. Look at the **upcoming month** and based on the target hours column, analyse the templates and outline where you believe the store is under- or over-staffed*

Step 3.** Adjust the templates for the upcoming month to get closer to the Salary Controller target. It can either be adding or removing hours with the aim of hitting the Salary % / Productivity target. **Remember to follow the local market regulations!

***Step 4**. Write an email outlining the changes to the Operational Planner.*

***Note**. Take all holidays and special events into consideration. If you are unsure about changes, consult with the present Shift Planning expert.*

HOMEWORK FOR NEXT SESSION

Dedicating time to analyse Shiftplanning Stats & Salary Controller to ensure your store hits the targets

From now on, you are responsible for making recommendations for the shiftplan to your Operational Planner, based on the insights in the Salary Controller!

Homework

Analyzing the shiftplan based on today's learnings!

***Step 1**. During the week, analyze the shiftplan of your store*

***Step 2**. See if there are any possibilities of adjusting the staffing up/down based on the data points you see in the stats on WP2 & Salary Controller combined with what you experience in the store*

***Step 3**. Reach out to your Operational Planner with any requested adjustments to you shiftplan and write a description of why the change is beneficial for the store*

***Step 4**. Receive confirmation/denial email from Operational Planner*

***Step 5**. If confirmed, adjust the shiftplan accordingly*
→ Be aware of any market regulations

Homework

Optimize the shiftplan for current & next month

***Step 1**. Look into the template for the upcoming month*

***Step 2**. See if there are any possibilities of adjusting the current template by using the same hours allocated*

***Step 3**. Reach out to your Operational Planner with any requested adjustments to you shiftplan and write a description of why the change is beneficial for the store*

***Step 4**. Receive confirmation/denial email from Operational Planner*

***Step 5**. If confirmed, adjust the shiftplan accordingly*
→ Be aware of any market regulations

All participants to present their adjustments at next session

SESSION 3

“MAKING SENSIBLE ADJUSTMENTS”

TODAY’s AGENDA

We have now bulit an analytical mindset and learned how to gather insights from the Salary Controller

LEARNING GOALS

1. **SHIFTPLANNING STATS**
   Learn how to analyse Shiftplanning Stats

2. **BUILDING AN ANALYTICAL MINDSET**
   Learn how to create recommendations & actions based on both operational observations & data analysis

LEARNING GOALS

1. **SALARY CONTROLLER – Key KPI’s for shiftplanning**
   Learn how to assess own shiftplan based on Revenue Target & Salary % target

2. **TAKING ACTION**
   Learn how to create sustainable recommendations which are sensible from both an operational and cost perspective

Session 3

LEARNING GOALS

1. **MAKING SENSIBLE ADJUSTMENTS**
   Making an adjustments in shiftplanning based on operational observation, analytical mindset, and Salary %

Session 4

LEARNING GOALS

1. **UNDERSTANDING & NAVIGATING WP2 Reports**
   Identifying and navigating the relevant WP2 reports used for shiftplanning

2. **TEMPLATE CREATION**
   Learning how to create a template in advance based on the data available & the information gathered from the store

Aim is to unlock more responsibility at each session ending up with full shiftplan responsibility post session 4

HOMEWORK PRESENTATION

Did anyone make any suggested adjustments to the Operational Planner? How did it go?

HOMEWORK FOR NEXT SESSION

Dedicating time to analyse Shiftplanning Stats & Salary Controller to ensure your store hits the targets

From now on, you are responsible for making recommendations for the shiftplan to your Operational Planner, based on the insights in the Salary Controller!

Homework

Analyzing the shiftplan based on today's learnings!

Step 1. *During the week, analyze the shiftplan of your store*

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Step 4. *Receive confirmation/denial email from Operational Planner*

Step 5. *If confirmed, adjust the shiftplan accordingly*
→Be aware of any market regulations

Homework

Optimize the shiftplan for current & next month

Step 1. *Look into the template for the upcoming month*

Step 2. *See if there are any possibilities of adjusting the current template by using the same hours allocated*

Step 3. *Reach out to your Operational Planner with any requested adjustments to you shiftplan and write a description of why the change is beneficial for the store*

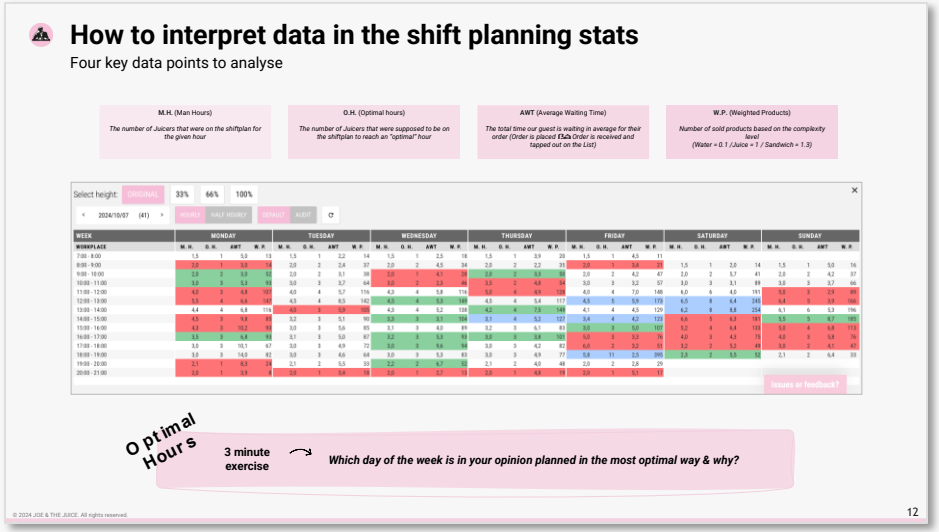
Step 4. *Receive confirmation/denial email from Operational Planner*

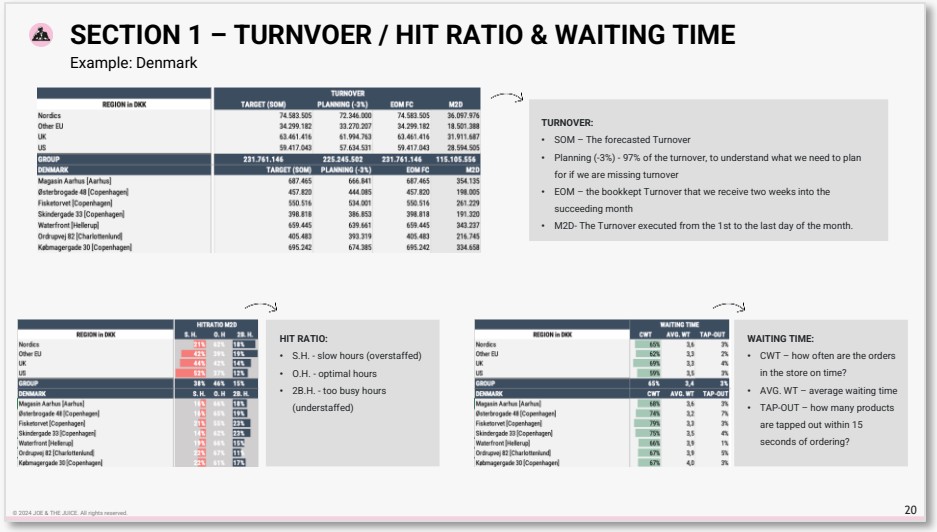
Step 5. *If confirmed, adjust the shiftplan accordingly*
à Be aware of any market regulations

All participants to present their adjustments at next session

RECAP FROM SESSION 1 & 2

What were the main take aways?





KEY POINTS FOR "LOOKING AHEAD":

- How to review the shiftplanning stats
- Operationally / Stats
- Assess DCWF based on CWT to identify operational challenges
- How to spot a red thread which needs attention
- Review the possible investments / saving in-store

KEY POINTS FOR "SALARY CONTROLLER":

- Get a holistic view on store performance based on all operational & financial KPIs
- How to analyse if investments in shifts are justified
- *Planning tool*: Assessing upcoming months based on revenue & trends
- *Execution tool*: Look at current performance of Revenue Target & Salary % to assess if any adjustments are needed

OTHER NOTES FROM SESSION 1 & 2

Recapped points that are important to remember

HOW TO MAKE SHIFTPLAN ADJUSTMENTS?

- Start with small adjustments → *You don't want to jump the gun*
- It helps looking at Monday – Thursday & Friday – Sunday
- You usually need minimum a week of data // Don't begin making corrective actions only 2 days in the month
- There will always be good & bad days
- **Gradually build up the level of adjustment ->** Start slow not to make drastic decisions

SHIFTPLANNING TAGS

- Remember, shiftplan tags will blur your optics!
- How do they impact the Hit-ratios again?
- Re-stock only to be used when the stockroom is externally located
- Shift-change tag to be used when it's beneficial to allocate a Juicer to carry out a structured shift change

All Shiftplan Tags will be a Salary Cost to the store which cannot be seen in Shiftplanning Stats

Recap

Shift-Change Re-stock	NO	Store Salary	We use these tags to dedicate time for crucial DCWF tasks during the day. Be aware that they are part of the store cost – so they might result in less hours for the remaining of the day

DAILY TASKS

As a manager…

SENSIBLE ADJUSTMENTS IN THE STORE

Merging operational observations with analytical mindset while using the Salary Controller insights

OPERATIONAL OBSERVATION

What is the operational reasoning? How can the investment increase store performance?

Identifying the need for the store

+

ANALYTICAL MINDSET

Is it a reasonable change based on shiftplanning stats & data?

Sense checking that the idea is an actual need and not just a "moment in time"

+

SALARY CONTROLLER INSIGHTS

Is the store "able" to do the investment based on Revenue Target & Salary %?

Making sure that the need is "sensible" from a P&L perspective!
"Higher Revenue allows for more shifts"

To make sensible investments or reduction of hours, we need to utilise all learnings we've been through so far!

HOW TO ASSESS IF YOUR ADJUSTMENT IS SENSIBLE?

Four-step adjnustment sense checking -> If all criteria are met, the idea is feasible

HIT-RATIOS

Do we experience any hours which are “out-of-normal” & deviates from grid / audit grid?

CWT

How did the team cope with the hour?

ACCEPTABLE REASONING?

- ✓ Store Capacity
- ✓ Juicer Capabilities
- ✓ Team Performance
- ✓ Number of Juicers on shift
- ✓ DCWF: Daily tasks & routines
- ✓ Broken equipment

Could the challenge be solved with looking into the above?

YES **NO**

Solution should be found elsewhere

REVENUE

Are we capturing full potential? (Transactions & Revenue)

SAL%

Do we have the possibility to invest hours based on the Salary % target & performance?

SENSIBLE ADJUSTMENT: EXAMPLE 1

Do we experience any hours which are “out-of-normal” & deviates from grid / audit grid?

HIT-RATIOS

MONDAY – FRIDAY			
M. H.	O. H.	AWT	W. P.
3,0	3	2,9	64
4,2	3	2,6	107
5,5	5	4,1	178
6,0	6	4,1	206
5,2	6	4,6	206
4,7	5	4,2	183
4,0	4	7	117
3,4	3	6,8	84
3,0	3	6,5	70
2,1	2	7,1	44

How did the team cope with the hour?

CWT

“During the busy hours, the team coped well. However, there were a fatigue in the afternoon hours following the busy hours”

YES **NO**

ACCEPTABLE REASONING?

Juicer Capabilities

= Strong team on shift

Store Capacity

= Full capacity not reached

Team Performance

= Team worked well together

DCWF

= No

Broken equipment

= No

Are we capturing full potential? (Transactions & Revenue)

REVENUE

We are not based on Hit-ratios

Do we have the possibility to invest hours based on the Salary % target & performance?

SAL%

Sal% = -0.5 (below target)

? **Invest hours during the busy period. No need to assess Revenue as investment is sensible from both operational, analytical and Sal% criteria**

SENSIBLE ADJUSTMENT: EXAMPLE 2

Do we experience any hours which are “out-of-normal” & deviates from grid / audit grid?

HIT-RATIOS

MONDAY – FRIDAY			
M. H.	O. H.	AWT	W. P.
3,0	3	2,9	64
4,2	3	2,6	107
5,5	5	4,1	178
6,0	6	4,1	206
5,2	6	4,6	206
4,7	5	4,2	183
4,0	4	2,5	117
3,4	3	3	84
3,0	3	2,1	70
2,1	2	2,5	44

How did the team cope with the hour?

CWT

“During the busy hours, the team coped well. However, the middle of the rush, the store ran out of Tuna”

YES **NO**

ACCEPTABLE REASONING?

DCWF

= During Rush period, the team had to prep more Tuna

Are we capturing full potential? (Transactions & Revenue)

REVENUE

We are not based on Hit-ratios

Do we have the possibility to invest hours based on the Salary % target & performance?

SAL%

Sal% = -1 (below target)

? **Based on the operational knowledge (out of Tuna) & CWT looking acceptable, no investment is needed. Instead, re-emphasize the importance of prepping according to Ideal Prep with the team. Especially since the morning was not busy and the team has a great opportunity to prepare the bar well**

SENSIBLE ADJUSTMENT: EXAMPLE 3

Do we experience any hours which are “out-of-normal” & deviates from grid / audit grid?

HIT-RATIOS

MONDAY – FRIDAY			
M. H.	O. H.	AWT	W. P.
1,5	1	2,2	14
2,0	2	2,4	37
2,0	2	3,1	38
3,0	3	3,7	64
4,0	4	10,5	116
4,5	4	11,3	142
4,0	3	5,9	105
3,2	3	5,1	90
3,0	3	5,6	85
3,1	3	5,0	87
3,0	3	4,9	72
3,0	3	4,6	64
2,1	2	5,5	33
2,0	1	3,4	18

How did the team cope with the hour?

CWT

“Guest had to wait for long time for their orders during the entire lunch rush & afternoon – due to lack of speed in product making

YES **NO**

ACCEPTABLE REASONING?

Juicer Capabilities

= Low seniority team

Are we capturing full potential? (Transactions & Revenue)

REVENUE

Revenue has been higher than expected M2D

Do we have the possibility to invest hours based on the Salary % target & performance?

SAL%

Sal% = *lower than target M2D*

? **Invest these hours into lunch rush to reduce the high waiting time & avoid team fatigueness in the afternoon**

SENSIBLE ADJUSTMENT: EXAMPLE 4

Do we experience any hours which are “out-of-normal” & deviates from grid / audit grid?

HIT-RATIOS

MONDAY – FRIDAY			
M. H.	O. H.	AWT	W. P.
0,5	1		6
1,0	1	4,2	26
1,0	1	3,4	12
2,0	2	3,5	49
3,1	3	6,4	70
3,2	2	4,0	39
2,0	2	3,7	43
2,0	1	3,6	24
1,0	1	3,9	12
1,0	1	3,5	12
1,0	1	3,2	10
1,0	1		

How did the team cope with the hour?

CWT

“The CWT looks acceptable"

YES NO

ACCEPTABLE REASONING?

All criterias are met. However, the STM has noticed high traffic during the hour between 8.00 – 10.00 and would like to invest in these hours, The STM also noticed slow hours in the afternoon.

Are we capturing full potential? (Transactions & Revenue)

REVENUE

Revenue is on point with target (prior to pilot)

Do we have the possibility to invest hours based on the Salary % target & performance?

SAL%

Sal% = *is on point (prior to pilot)*

? **Re-locate the hour 13.00 – 14.00 & 15.00 – 16.00 to 8.00 – 10.00**

SENSIBLE ADJUSTMENT: EXAMPLE 5

Do we experience any hours which are “out-of-normal” & deviates from grid / audit grid?

HIT-RATIOS

MONDAY – FRIDAY			
M. H.	O. H.	AWT	W. P.
0,9	1	3,4	18
1,0	1	2,0	17
1,0	1	2,5	17
2,0	2	2,8	51
3,0	3	4,6	91
2,2	2	3,9	33
1,0	1	3,4	24
1,0	1	3,6	13
1,0	1	3,2	14
1,0	1	7,3	13
1,0	1	7,0	9

How did the team cope with the hour?

CWT

“The CWT looks acceptable"

YES **NO**

ACCEPTABLE REASONING?

All criterias are met. However, the STM has noticed high traffic on the street in the hour between 8.00 – 10.00 and would like to pilot another Juicer from 8.00 to increase the Revenue.

Are we capturing full potential? (Transactions & Revenue)

REVENUE

Revenue is on point with target (prior to pilot)

Do we have the possibility to invest hours based on the Salary % target & performance?

SAL%

Sal% = *is below target (prior to pilot)*

Assess following:

- Are products (W.P) increasing? during the “investment pilot”
- Is this leading to an increased Revenue?
- Without dragging down Sal% above target?

? **Pilot Investment made by STM adding 1 person extra on shift between 8.00 – 10.00**

EXERCISE: Get together in groups and reflect for 30 mins:

Step 1. Look at your store's shiftplan during the last two weeks, where you were present in the store

Step 2. Analyse the data available based on the above examples:

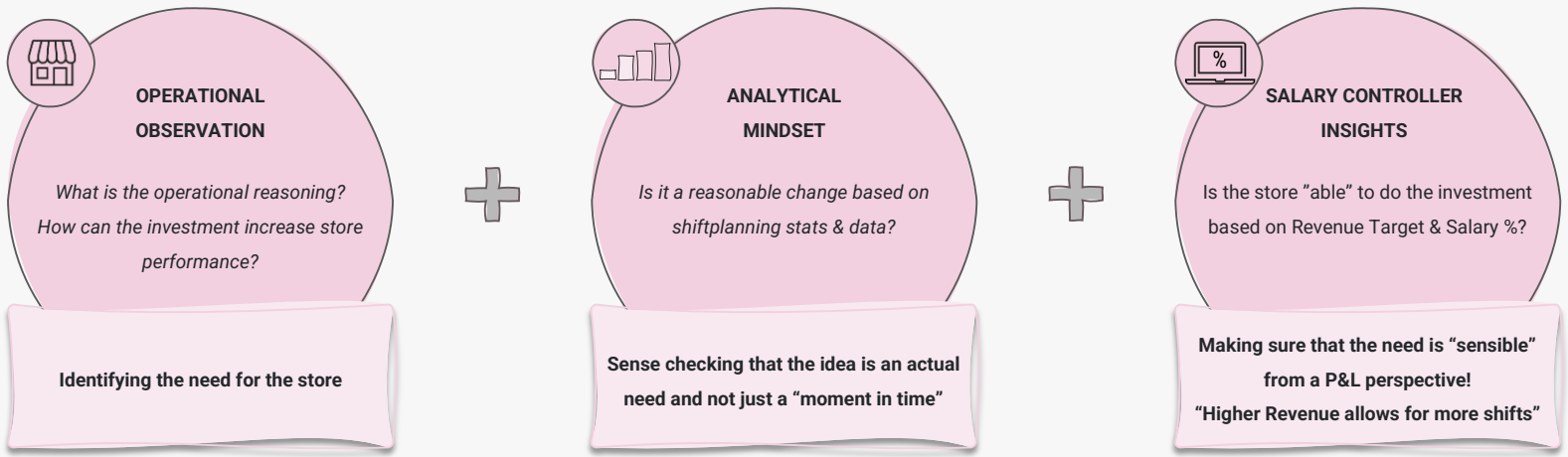
→ Shiftplanning Stats = Hit-Ratio, CWT, Reasoning, Revenue, Sal%

Step 3. Make an action to optimise your shiftplan

Step 4. Present the chosen action to the group

***Note:** Remember, an action can also be "no action or investment" due to operational reasonings*

Remember!



EXERCISE: SALARY WEEKENDS / HIGH REVENUE WEEKEND

Step 1. Open the shift plan of your store and focus on the staffing for the upcoming Salary Weekend

Step 2. Based on your operational experience as well as the stats from previous weeks and the weather forecast – analyse the shift plan and decide whether your staffing is optimal

Step 3. Make changes to the shift plan to ensure optimal staffing for maximising revenue. If no changes are made, explain why you believe the staffing is correct.

Remember!

OPERATIONAL OBSERVATION

What is the operational reasoning? How can the investment increase store performance?

Identifying the need for the store

+

ANALYTICAL MINDSET

Is it a reasonable change based on shiftplanning stats & data?

Sense checking that the idea is an actual need and not just a "moment in time"

+

SALARY CONTROLLER INSIGHTS

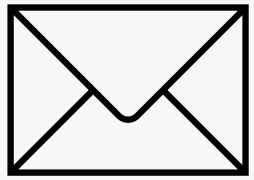
Is the store "able" to do the investment based on Revenue Target & Salary %?

Making sure that the need is "sensible" from a P&L perspective!
"Higher Revenue allows for more shifts"

COMMUNICATION ABOUT SENSIBLE INVESTMENTS

Once a ”sensible investment” is made, communication is key

MANAGER



TEAM

- Highlight shiftplan changes
- Receive approval from Juicer if it affects any shifts with-in regulation period
- Share thoughts about adjustment with the team to drive performance towards goal
- Be aware of any market-specific rules/laws of notice period

DISTRICT MANAGER

- High-level breakdown of thought process
- Highlight shiftplan changes
- Explain aim with adjustment

Case Study: The Art of Shiftplanning as a Store Manager

As a Store Manager at Joe & The Juice, you are responsible for running an efficient and profitable operation while ensuring an optimal guest experience. You are two weeks into a summer month, and your District Manager has set a clear priority:

"Your store MUST reach the Salary Percentage and Productivity targets by end of month—without compromising the guest experience."

Current Store Performance & Challenges

📊 **Revenue:** $30K M2D / $80K Target – You are behind pace – there is a need to capitalize all possible revenue.

📊 **Hit Ratios:** Are you allocating staff correctly across these time periods?

- 60% slow hours
- 30% optimal hours
- 10% busy hours

📊 **Customer Wait Time (CWT):** 62% – A critical indicator of guest experience. Do adjustments need to be made?

📊 **Salary %:** 26.7% M2D (Target: 25.4%) – Higher than target, meaning shiftplan must be adjusted.

📊 **Productivity:** 13.5 M2D (Target: 14.2) – Below target, suggesting that either revenue per shiftplan hour must increase or hours need to be adjusted.

🌞 **Weather Forecast:** Sunny & busy for the next two weeks—higher traffic is expected. How will you prepare your shifts for increased demand without overspending hours?

Your Task: "Shiftplan optimization"

💡 Based on the data, how will you adjust your shiftplan to hit targets while ensuring a smoot operation? Your answer must address each of these points with a structured shift planning approach.

✅ **Shift Allocation:** Which shifts will you reduce, restructure, or potentially increase to match traffic patterns?

✅ **Salary % Control:** How will you remove excess hours while maintaining operational efficiency?

✅ **Productivity Improvement:** How can you align staffing with sales trends to increase productivity per labor hour?

✅ **Guest Experience:** How will you balance efficiency with a sustainable wait time for guests?

BUSINESS CASE: APPENDIX

WEEK	MONDAY				TUESDAY				WEDNESDAY				THURSDAY				FRIDAY				SATURDAY				SUNDAY			
WORKPLACE	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.	M. H.	O. H.	AWT	W. P.
7:00 - 8:00	1,0	1	1,9	25	1,0	1		7	1,0	1	3,5	17	1,0	1	1,1	14	1,0	1	2,3	13								
8:00 - 9:00	2,0	2	1,1	29	2,0	2	1,7	37	1,0	1	1,6	25	1,0	2	1,7	35	1,0	2	2,3	34	1,0	2	2,1	36	1,0	1	0,8	20
9:00 - 10:00	3,0	3	2,2	72	2,0	2	2,0	32	3,0	2	2,1	48	2,0	3	2,8	57	3,0	2	5,9	55	3,0	3	2,1	81	3,0	2	2,6	55
10:00 - 11:00	3,0	3	2,9	57	3,0	2	2,3	53	3,0	3	2,7	75	3,0	3	2,1	65	3,0	4	6,0	117	3,1	3	3,8	91	3,2	3	4,0	103
11:00 - 12:00	3,5	3	2,7	108	4,0	3	1,9	78	4,1	4	3,8	147	3,5	5	5,2	170	5,0	4	6,3	147	8,0	7	4,9	220	6,2	4	3,8	128
12:00 - 13:00	5,0	4	2,8	134	4,9	6	5,1	191	6,0	4	3,1	159	5,0	4	4,9	160	5,2	6	4,8	192	8,2	8	9,5	274	9,0	8	5,3	269
13:00 - 14:00	5,0	4	2,8	137	4,0	4	3,3	120	5,0	4	2,5	121	5,1	4	3,5	160	5,7	4	3,5	156	9,6	8		284	8,3	8	5,4	253
14:00 - 15:00	4,9	3	3,1	94	4,3	4	2,7	120	4,0	4	2,0	119	4,6	4	2,0	127	4,3	4	3,6	124	8,2	8	5,8	260	8,0	7	3,8	213
15:00 - 16:00	4,0	3	4,6	74	3,0	3	2,9	106	4,0	4	2,5	115	4,0	3	3,4	110	4,5	4	5,4	121	6,2	6	8,3	193	6,7	5	3,5	166
16:00 - 17:00	3,0	3	2,4	78	3,0	3	4,3	90	3,0	4	3,0	120	4,1	4	2,9	123	4,0	4	4,2	116	4,3	4	4,8	119	3,9	3	3,6	110
17:00 - 18:00	3,1	3	3,8	93	3,8	3	4,6	107	3,7	4	5,5	143	5,3	3	2,8	78	3,4	3	3,2	88	3,1	3	4,9	84	3,0	3	4,6	70
18:00 - 19:00	3,0	2	3,2	35	3,0	2	3,7	55	3,0	3	4,8	104	3,8	3	3,6	77	3,0	2	4,5	43	2,0	3	8,6	72	3,0	2	2,9	36
19:00 - 20:00	2,9	2	3,0	31	3,0	2	3,1	35	3,0	3	4,5	63	3,0	2	3,5	41	3,0	2	3,0	29								
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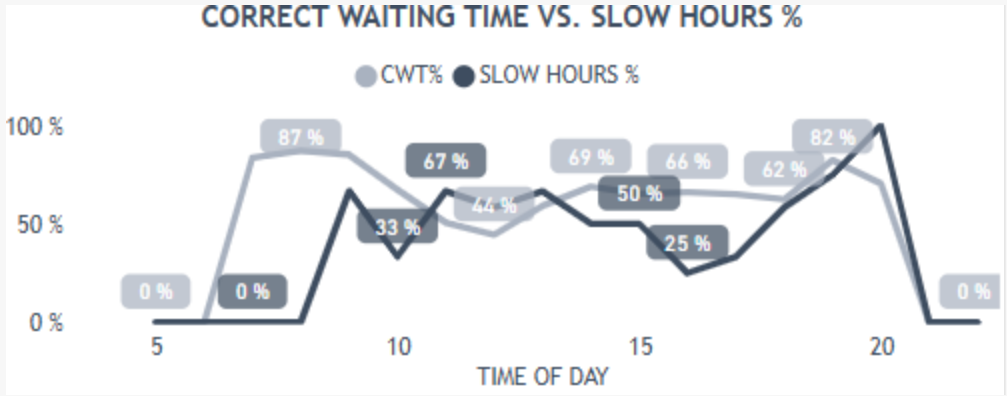
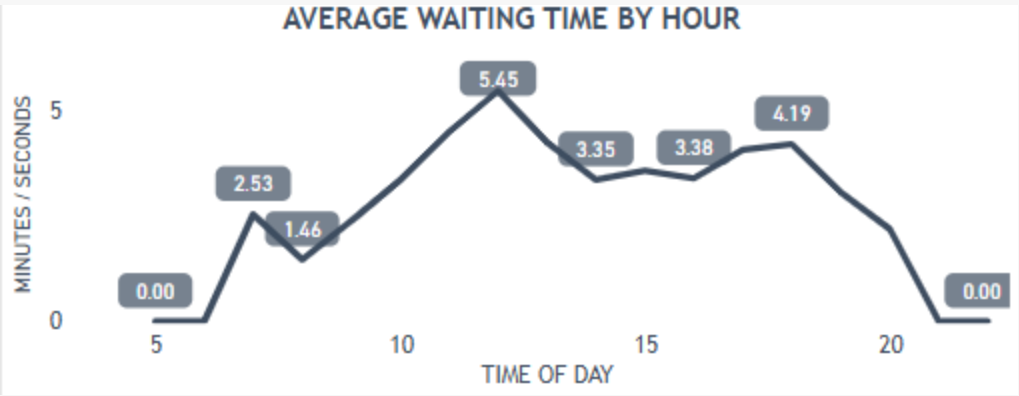
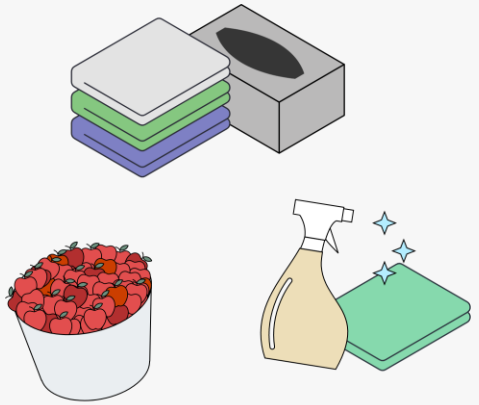




STORE ASSESSMENT

ASSESSING THE COMPLEXITY OF DAILY TASKS

Tailoring your shiftplan to what is actually needed to optimise the shiftplan

PREP	CLOSING PROCEDURES	SHIFT CHANGE & RESTOCK
		
Stop-watch how long time it takes to prepare your store based on Ideal Prep	**Stop-watch how long time it takes to close your store based on DCWF & Ideal Close procedures**	**Stop-watch how long time it takes to carry out an ideal shift-change & ideal re-stock**

HOW & WHERE?

- Carry out exercise with various staff members in your store
- Fill out provided sheet & send to your Operational Planner with the aim to include the real-time in target-setting

Store Manager Tag Time Sheet.xlsx

WHERE ARE WE NOW?

Full autonomy for Shiftplan adjustments

Session 1

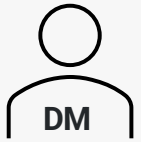
Optimizing shiftplan based on Shiftplanning Stats

Session 2

Optimize the shiftplan for current & next month based on Salary Controller insights

Session 3

From now on, you are fully responsible for making shiftplan adjustments



Use your DM as sparring if needed

SESSION 4

WP2 REPORTS & TEMPLATING

WP2 REPORTS

1. **New Sales Report:** *Revenue deep dive*

2. **Guest Experience:** CWT / Complaints

3. **Salary Report:** This will be the new Salary Controller going forward

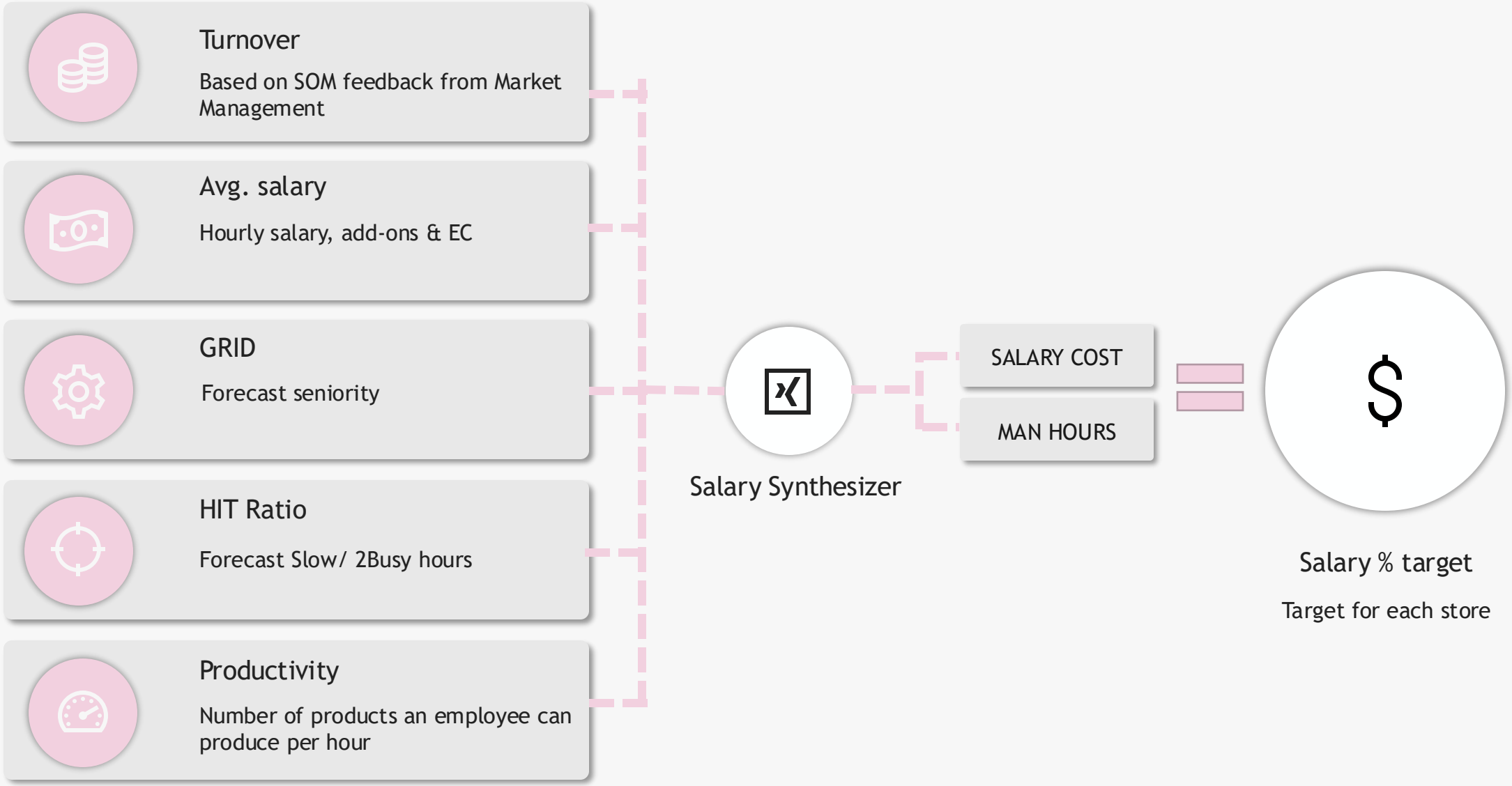
   *Bear in mind that the report is not ready yet…

4. **Shiftplanner Report:** Holistic view of hit-ratios

Let’s check it out!

SHIFTPLAN PROCESS

Generating salary targets



KEY AREAS TO HAVE IN MIND WHEN CREATING A TEMPLATE

All areas can affect the shiftplan and traffic of your store

CURRENT INDEX

- How is your store currently performing vs LY?
- Are we on par with the quantity of products or are we above?
- How does LM, L2M & L3M performance look? (new sales report)

LAST YEAR PERFORMANCE

Look into the shiftplanning LY, how was the weekly split. When was the store busy & when was it slow?

- Week before people get paid = decrease
- "Spring break" = usually impacts stores
  - Malls increased traffic
  - Residential stores = decreased traffic

EVENTS

Is there any events close to your store for the coming month? How will that impact your store?

Example: Taylor Swift is performing in Fields, how will that impact the shopping mall?
→ Look into earlier events similar to the event that will occur).

PUBLIC HOLIDAYS

Are there any public holidays in the month you are templating?
If yes, investigate performance for those days in your store last year (similar to events):

Will the quantity of products increase or decrease in your store due to the public holiday?

Should your store operate during these day?

SALARY WEEKENDS

In general the ***Revenue & Quantity*** of products increase during the salary weekend and a few days after salary weekend!

This means that we should increase the staffing for this weekend and decrease staffing for the week prior to salaries being paid out.

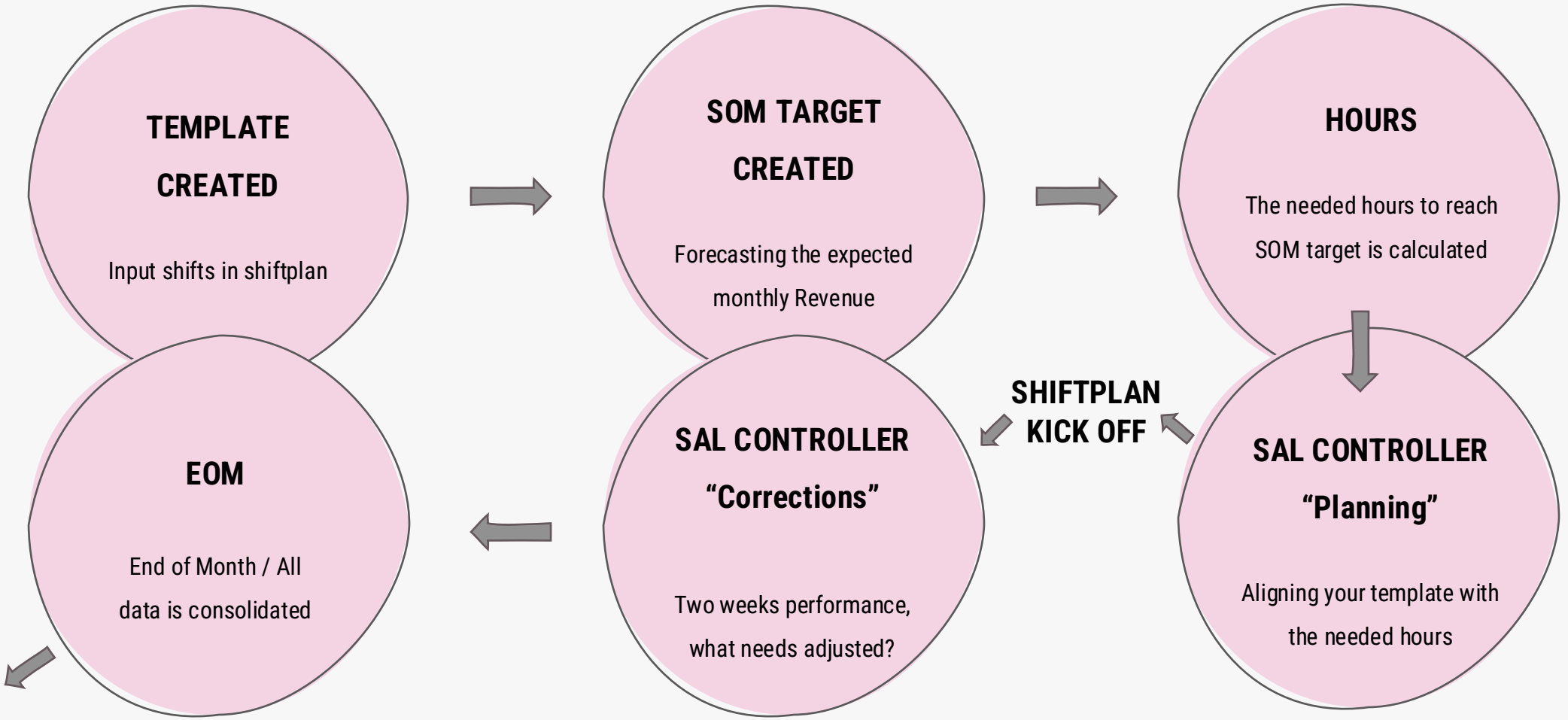
STORE OPENING HOURS

In combination with public holidays and events sometimes the stores are chaning opening hours ***Example***: *Malls the week before christmas!* It's important that this gets updated already at template creation!

****Disclaimer***: *If you want to change opening hours, this needs to be confirmed by the Operational Planner*

THE PROCESS OF CREATING A TEMPLATE

Templating is the first step of making a shiftplan. Looking ahead and forecasting what the shiftplan looks like

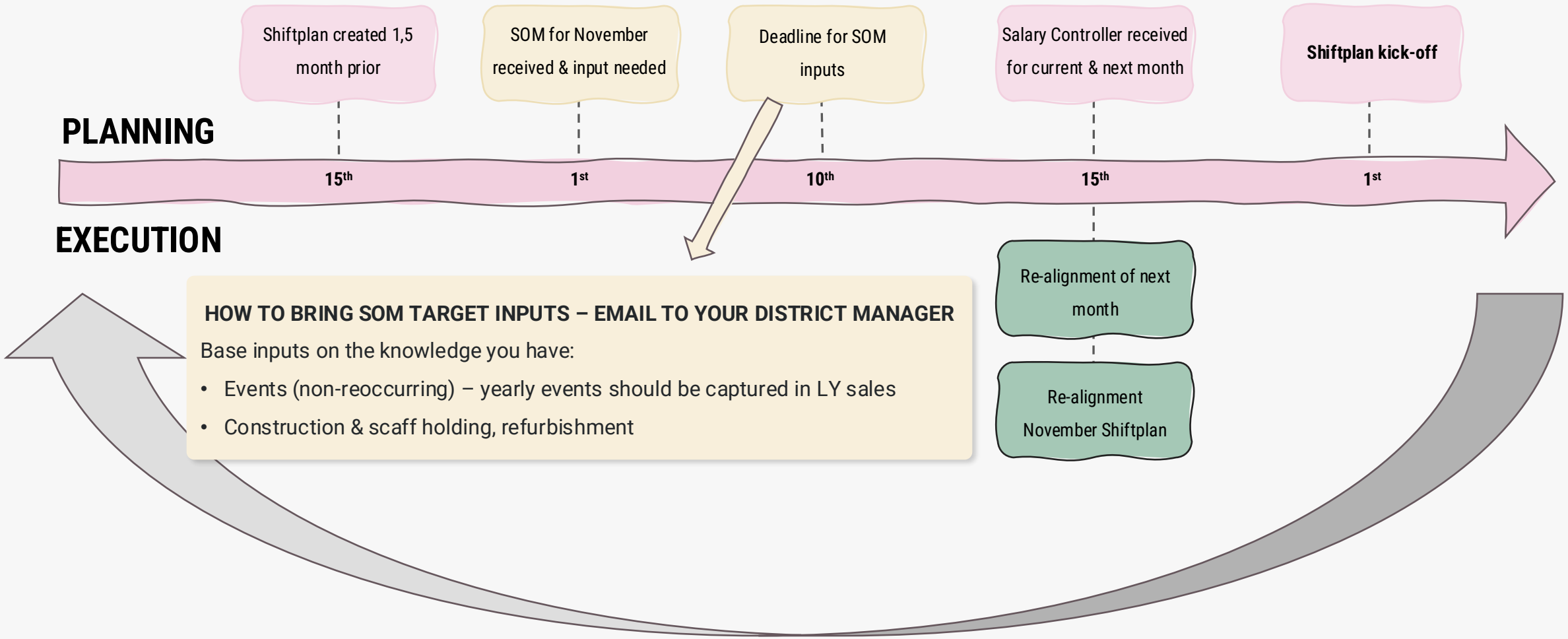


SALARY % TARGET

Good template = Less adjustments & fewer corrections

UPDATED SHIFTPLAN TIMELINE

Show-casing all relevant dates and tasks to consider when making a healthy shiftplan



EXERCISE: Let’s create a template 1 hour

***Step 1**. Open up the Shiftplanning on WP2 and go to <u>your</u> store in Manager groups*

***Step 2**: Analyse the templates from your store in two months using the Shiftplanner Report to compare with same month last year*

Remember:

- *Look into quantity of sold products L3M*
- *Look into SSS (same-store-sales)*
- *Be aware of events, public holidays, salary weekends and opening hours*

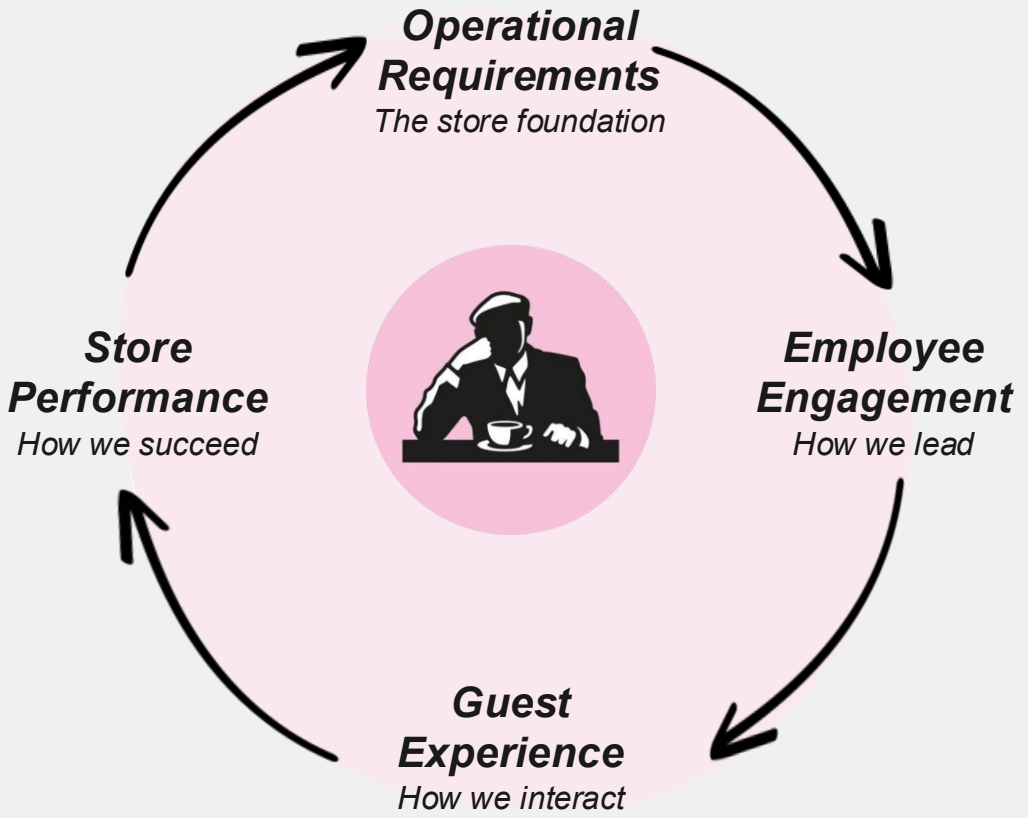
***Step 2**. Create template for month 2-3 months ahead in groups (ASTM & STM)*

***Step 3**. Explain thoughts process to the rest of the group*

SUM-UP AND IMPACT

How does Shiftplanning affect COE?

CIRCLE OF OPERATIONAL EXCELLENCE



How does mastering these skills affect each area within *the Circle of Operational Excellence* in your store?

HOW TO APPLY INTO PRACTICE

The various responsibilities spread out across the four roles with a gradual implementation approach

ASSISTANT STORE MANAGER	• Provide feedback of operational observations • Follow up on hit-ratios & shiftplanning stats & compare with real-life experience • Sign-off on daily clock-in deviations
STORE MANAGER	• Creation of templates • Make adjustments based on Salary controller insights • Make sensible investments/adjustments in the store to increase Revenue &/or reach Salary % target • Communicate weekly clock-in deviations to DM • Ensure DCWF time sheet is updated on a monthly basis
DISTRICT MANAGER	• Daily, Weekly, Monthly support • Full ownership of shiftplanning in the district • Close the week's shiftplanning on WP2 & approve clock-in deviation
OPERATIONAL PLANNER	• Sparring & follow up • Executive decisions towards store not meeting Salary % target

MANAGER SPECIALIST SESSIONS