

# Strategic workforce blueprinting for banking

Proactively align your workforce to drive growth and profitability



In today's profit-squeezed banking environment, you need to increase efficiency, manage costs, and deliver a better customer experience to stay ahead. With just 15% of banks expected to achieve both long-term profitability and growth, innovation, meticulous planning, and superior service is what will set winners apart.

To succeed, you must continuously refine and align your workforce to meet your changing strategies and operational goals. Ensure you have the right skills and talent in place both now and in the future.

## There is a better way to plan

With strategic workforce blueprinting, you can understand exactly what talent levers to pull and how to optimize costs to deliver exceptional customer value. Drive growth at your bank with a centralized, accurate view of your headcount, costs, and capabilities. Model detailed “what-if” scenarios to strike the right balance between addressing your short-term workforce needs and anticipating future talent and skills to achieve your long-term strategic goals.



## Key Benefits

- **Drive sustainable growth.** Gain visibility and align talent and skills with your top-line strategies to identify hiring, upskilling/reskilling, automation, and cost-effective alternatives. By ensuring you have the right people with the right skills to deliver on your strategic goals, you can minimize risk and accelerate revenue growth.
- **Reduce your costs.** Maximize efficiency and transparency with a single view into talent demand and supply, redundancies, and skills and capabilities across multiple lines of business and time horizons. Reallocate staff to where they are needed most to improve productivity and use advanced “what-if” scenario modeling to reduce costs by up to 5%.
- **Improve customer satisfaction.** Accurately forecast demand and FTE capacity across your different channels. By simplifying the process of analyzing historical trends and generating forecasts, you can minimize under- or overstaffing to better serve your customers.

## CUSTOMER STORY



### FORTUNE 500 BANK

One of the world's largest banks, with millions of customers globally, first leveraged Anaplan to transform their contact center operations. Since then, they have vastly expanded their practice to plan for their entire workforce.

#### Challenges:

- **Poor customer experience and regulatory fines** due to inadequate contact center staffing.
- **Redundant resources and recurring annual budget overruns** due to disparate hiring processes across geographies.
- **Oversimplified demand modeling**, resulting in over- and understaffing and increased costs.

#### Results:

Achieved a 10x ROI in the first year of deployment and a 2% decrease in personnel costs as a percentage of net operating income by:

- **Increasing transparency and collaboration** by creating a single source of truth for budget targets across operations, finance, HR, and other stakeholders.
- **Improving forecasting accuracy** with the ability to model unit-level drivers of demand tailored to different lines of business.
- **Gaining real-time visibility into their annual hiring progress**, allowing them to swiftly course correct and ensure alignment with business strategy.

## Key features

#### With Anaplan, you can:

- Hire talent from outside your bank to close remaining critical skills gaps.
- Upskill or reskill internal staff to close identified skills gaps and meet future workforce needs.
- Leverage contractors or reallocate employees to where they are needed most.
- Automate tasks to free up workforce capacity and enable staff to focus on higher-value tasks.

#### Operational workforce planning

- Plan and model workforce against annual operating plan (AOP) and business strategies.
- Roll up the organization for bottom-up planning or cascade down for top-down scenarios.
- Incorporate hiring and attrition trends, role ramp time, and team-work ratio assumptions.
- Align position plans, hiring, and new requisitions with the approved budget to streamline the budget-to-hire process.

#### Strategic workforce planning

- Model your workforce needs against your demand drivers at the right level of granularity for the time horizon under consideration.
- Assess how critical roles and skills will evolve over time and identify talent gaps for future skills like AI/ML.
- Assess changes to your bank's workforce using assumptions such as hiring, mobility, aging and retirement, and turnover.

## Workforce capacity planning

#### Contact center planning

- Generate contact center forecasts across all time horizons, including intra-day, short-term, and long-term.
- Analyze trends against transactional volumes over time to forecast required agent capacity and skill levels.
- Improve SLA and NPS monitoring through skills and capacity rightsizing.

#### Channel optimization

- Accurately forecast demand and FTE capacity across different channels (online, mobile, third-party services, etc.).
- Calculate existing workforce capacity — with integrated data from your workforce management system — to calculate the real utilization rate and inform scheduling and allocation.
- Connect workforce costs with product and service offerings to accurately determine the cost to sell and service customers by channel.

#### Branch planning

- Assess the impact of branch openings, closures, or repurposing on headcount, activity, costs, customer service, and profitability.
- Enable scenario modeling of FTE demand at the branch level, based on forecasting branch activity, to avoid over- or understaffing.
- Simulate headcount changes (e.g., changing in sourcing) and evaluate the impact of realignments or restructuring.

## The Anaplan platform

- **Use advanced “what-if” scenario modeling**, powered by our patented Hyperblock™ calculation engine, to produce ultra-fast calculations at unprecedented scale.
- **Integrate seamlessly** with HCM/HR, finance, operations, and other systems of record using prebuilt connectors or third-party ETL tools.
- **Manage organization-wide workforce data**, workforce plans, and hierarchies in a centralized data hub.
- **Leverage built-in dashboards, reporting, and analytics** with data visualization to provide a single source of truth on business performance.
- **Ensure best-in-class security**, with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.



## About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit [www.anaplan.com](http://www.anaplan.com)

**Anaplan**