

## Automatic Allocation of CSRs Across Services and Regions: A Tutorial

In the LINKS Services Marketing Simulation, the allocation of experienced CSRs across services and regions occurs automatically.

The steps involved in this automatic allocation process are shown in this tutorial, via an extended example using illustrative/sample data for firm 9 in a particular quarter of a previous industry for the LINKS Services Marketing Simulation.

**Step 1:** Determine potential sales. “Potential sales” equal current-quarter sales volume plus unfilled orders. [Data Source: LINKS Service P&L Statements]

		Total	Region 1	Region 2	Region 3
<b>Service 9-1</b>	Service Calls	55,809	22,956	0	32,853
	Unfilled Orders	0	0	0	0
<b>Service 9-2</b>	Service Calls	33,811	15,108	9,741	8,962
	Unfilled Orders	1,408	0	1,408	0
Total Potential Sales		91,028	38,064	11,149	41,815
% Distribution of Potential Sales By Region			41.8%	12.3%	45.9%

**Step 2:** Allocate beginning-of-quarter experienced CSRs to regions proportional to potential sales across regions. [Data Source: LINKS Service Operations Report {Staffing Report}]

	Total	Region 1	Region 2	Region 3
Beginning-of-Quarter Experienced CSRs	347			
Distribution of Potential Regional Sales [from Step 1]		41.8%	12.3%	45.9%
Allocated CSRs Based on Sales Potential %s		145	43	159
- Resignations During This Quarter	-34	-20	-10	-4
= Available Experienced CSRs During This Quarter	313	125	33	155

Since resignations are unpredictable during a quarter, there will be some statistical differences in the final allocations (Available Experienced CSRs During This Quarter) across the regions compared to the intended proportional allocations by potential regional sales.

*Note: Roundings in these CSR allocation calculations may yield minor differences in resulting calculations of “Available Experienced CSRs During This Quarter.”*

**Step 3:** Determine within-region CSR time allocations to services in each region based on relative demand and CSR productivity, and then display calculations and data related to capacity utilization, cost-per-call, and turnover. [Data Source: LINKS Service Operations Report]

	Region 1	Region 2	Region 3
<b>Service 9-1 Productivity Report</b>			
Net CSR Productivity [based on service 9-1 design configuration]	458.2	458.2	458.2
CSRs [from Step 2]	125	33	155
Potential Sales [from Step 1]	22,956	0	32,853
CSRs Required For These Potential Sales	50.10	0.00	71.70
Time Allocation [based on calculated CSRs from above]	<b>51%</b>	<b>0%</b>	<b>72%</b>
Hires Productivity [two-thirds of experienced CSR productivity]	305.5		
Hires [firm 9's current decision]	99		
Potential CSR Capacity [see sample calculation below]	44,631	0	51,132
CSR Maximum Capacity Limit [firm 9's current decision]	95%	95%	95%
Actual CSR Capacity	42,399	0	48,575
<b>Service 9-1 Activity Report</b>			
Service Calls [from Step 1]	22,956	0	32,853
CSR Capacity [from above]	44,631	0	51,132
CSR Utilization [service calls divided by CSR capacity]	51%	0%	64%
CSR Cost/Call [\$]	76.66	0.00	67.18
CSR Turnover [%]	16%	0%	2%
<b>Service 9-2 Productivity Report</b>			
Net CSR Productivity [based on service 9-2 design configuration]	310.7	310.7	310.7
CSRs [from Step 2]	125	33	155
Potential Sales [from Step 1]	15,108	11,149	8,962
CSRs Required For These Potential Sales	48.63	35.88	28.84
Time Allocation [based on calculated CSRs from above]	<b>49%</b>	<b>100%</b>	<b>28%</b>
Hires Productivity [two-thirds of experienced CSR productivity]	207.2		
Hires [firm 9's current decision]	99		
Potential CSR Capacity [see sample calculation below]	29,081	10,254	13,485
CSR Maximum Capacity Limit [firm 9's current decision]	95%	95%	95%
Actual CSR Capacity	27,626	9,741	12,810
<b>Service 9-2 Activity Report</b>			
Service Calls [from Step 1]	15,108	9,741	8,962
CSR Capacity [from above]	29,081	10,254	13,485
CSR Utilization [service calls divided by CSR capacity]	52%	95%	66%
CSR Cost/Call [\$]	111.92	83.12	95.77
CSR Turnover [%]	13%	19%	5%

*Sample Calculation of "Potential CSR Capacity": For service 9-2 in region 3, a 28% time allocation of 155 experienced CSRs in region 3 with net CSR productivity of 310.7 service units per experienced CSR yields 13,484 units of "Potential CSR Capacity." In region 1, the multiplicative product of CSR time allocation, hires productivity, and number of hires would be added to the experienced CSR capacity calculation to obtain the region-1 "Potential CSR Capacity."*