



StaffPro[®]

Your **All-Inclusive** choice to
Optimize Branch Productivity

Overview

Comprehensive - Flexible - Customizable

*** Each slide title links to a page on the StaffPro website*

Forecasting Staff

- Know the optimal ***number of staff*** on ***each day*** at ***each branch*** doing ***which activity***
- Transaction-based (no time-studies needed!)
- Supports multiple formulas
- Calculated monthly
- Rolling 3-month analysis + 12-month trend analysis

2022-05-30 Forecast Detail (drag to move window)

Item	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30	12:00	12:30	1:00	1:30	2:00	2:30	3:00	3:30	4:00	4:30	5:00	5:30	6:00	6:30	7:00	7:30
^ Teller																										
Forecast	0	0	1	3	4	3	3	4	3	3	3	3	3	3	3	3	3	3	3	2	1	0	0	0	0	0
Actual	0	0	1	2	3	3	3	3	2	2	3	3	3	2	3	3	3	3	3	2	1	0	0	0	0	0
^ CSR																										
Forecast	0	0	0	1.5	1.5	1.5	1.5	1.5	2	2	2	1.5	1.5	1.5	1.5	1.5	1.5	2	2	2	1.5	0	0	0	0	0
Actual	0	0	0	0	2	2	2	2	1	2	2	2	2	1	2	2	2	2	2	2	2	0	0	0	0	0

Over/Under
Service Forecast

Scheduling Staff

- Optimized demand-based schedules ***generated automatically***
- Click-and-Drag user interface – easy to use
- Weekly schedules emailed to employees
- Employees notified of schedule changes
- Handles complex HR scheduling rules
- Reduce manager's time spent scheduling
- Increase branch efficiency

[illegible]

Float Staff

- Fully supported float module
- Better utilize staff within branch clusters
- Simplify Float Requests/Assignments
- Smart Auto-Assign capability

Float Staff Management Page

The screenshot displays the Float Staff Management Page, which is divided into several sections. On the left, a 'Branch' table lists various locations and their staff availability for a specific week. In the center, a 'Requests' section shows a list of requests with details like date, location, and assigned staff. On the right, an 'Employees' section lists staff members and their availability. A 'Request Detail' panel on the far right provides a comprehensive view of a selected request, including its date, location, worktype, time, and note. Callouts highlight key features: 'Request summary by pool for the selected week' points to the Branch table; 'Possible employees for selected request' points to the Employees section; 'Request detail list for selected pool or branch' points to the Request Detail panel; and 'Information and control for the request or employee' points to the bottom of the Request Detail panel.

Branch	5/30	5/31	6/1	6/2	6/3	6/4
1st Demo Financial	1 of 1		1 of 1	1 of 1	1 of 2	
Northwestern	1 of 1		1 of 1	1 of 1	1 of 2	
101 - Main Office			1 of 1		1 of 1	
102 - Valley Mall				1 of 1		
103 - North Broadway	1 of 1				0 of 1	
South End						
104 - Airport Road						
105 - South End						
106 - Industrial						
107 - University						
108 - East						
109 - Downtown						
101 - Main Office			1 of 1		1 of 1	
102 - Valley Mall				1 of 1		
103 - North Broadway	1 of 1				0 of 1	

Requests

- 2022-05-30 103 - North Broadway
Assigned: Cathy Coast
09:00 AM - 05:00 PM
ID: 2872
- 2022-06-01 101 - Main Office
Assigned: Cathy Coast
08:30 AM - 04:00 PM
ID: 2868
- 2022-06-02 102 - Valley Mall
Assigned: Cap America
08:30 AM - 02:00 PM
ID: 2870
- 2022-06-03 103 - North Broadway
Assigned: Loans
08:00 AM - 05:00 PM
ID: 2871

Employees

- Avery, Kinsey
Weekly Approved 40
No availability Not yet scheduled
- Cooke, Bailey
Weekly Approved 32
A:08:00 AM - 06:30 PM (100%) S:09:30 AM - 04:30 PM
FLOAT
- Garage, Francene
Weekly Approved 40
A:08:00 AM - 06:30 PM (100%) Not yet scheduled
- Smith, Janice
Weekly Approved 40
A:08:00 AM - 06:30 PM (100%) Not yet scheduled
- Zuchinni, Lyla
Weekly Approved 40
No availability Not yet scheduled

Request Detail

Date * 2022-06-03
Location * 103 - North Broadway
Worktype * Loans
Time * 08:00 AM to * 05:00 PM
Note

Employee Detail

Employee
Date 2022-06-03
Location 103
Work Type Loans
Time * 08:00 AM to * 05:00 PM
Lunch No lunch

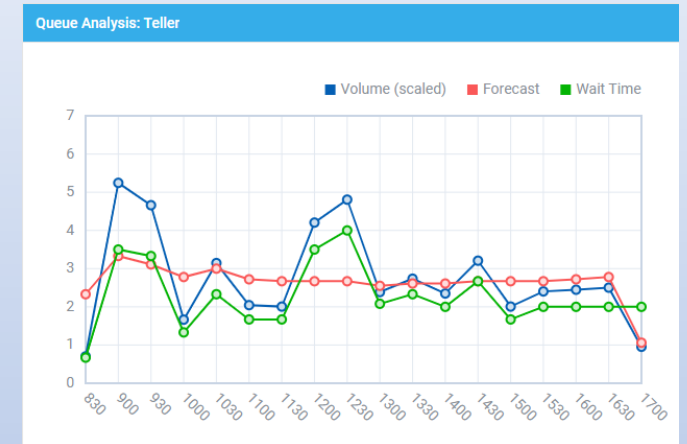
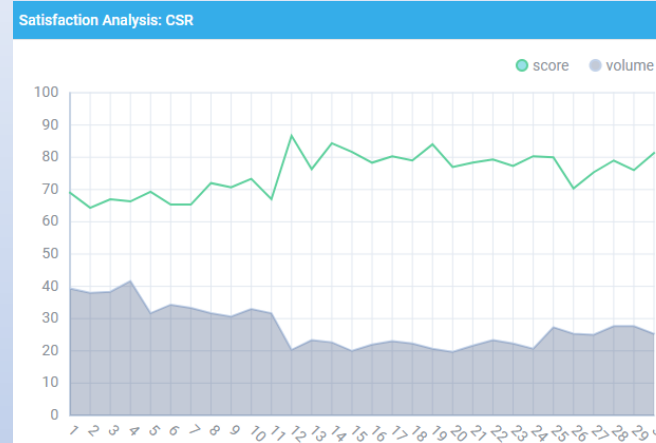
Request summary by pool for the selected week

Possible employees for selected request

Information and control for the request or employee

Dashboard Analytics

- Make better informed decisions
- Visibility into **key metrics**
- Get a clear picture from any level
- Gain insights into what questions to ask
- Any number of analytics per tab
- Export analytics to Excel CSV



Branch Dashboard Selections

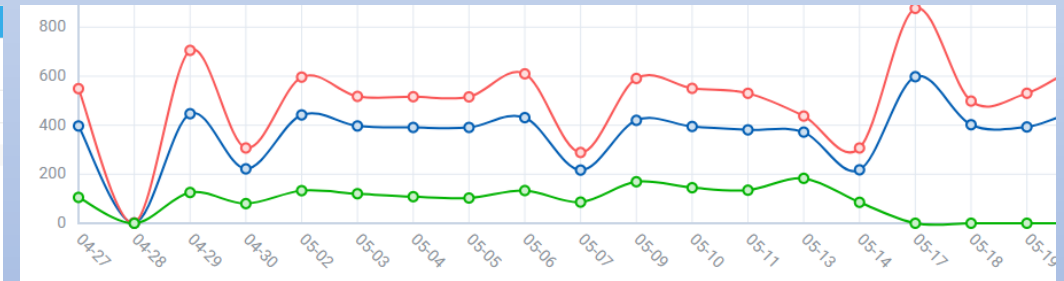
Refresh 2022-06-06 Export

Organization

- 1st Demo Financial
 - City Center
 - 101 - Main Office
 - 102 - Valley Mall
 - 103 - North Broadway
 - University
 - South End
 - Popperville
 - 104 - Airport Road
 - 105 - South End
 - 106 - Industrial

Employees

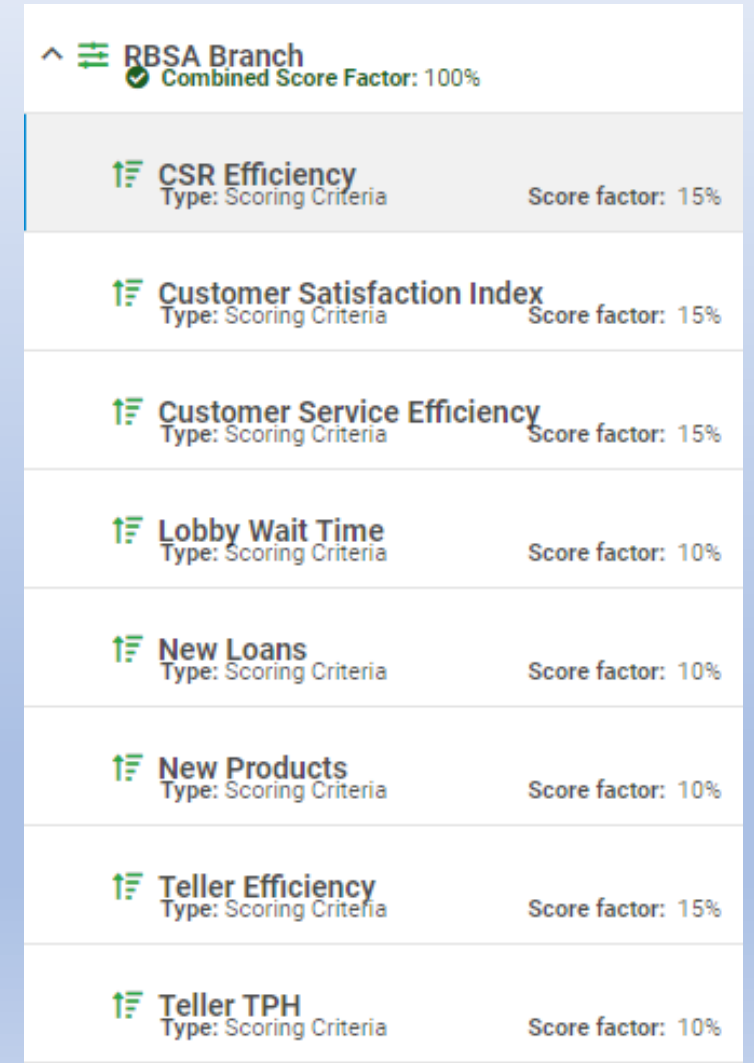
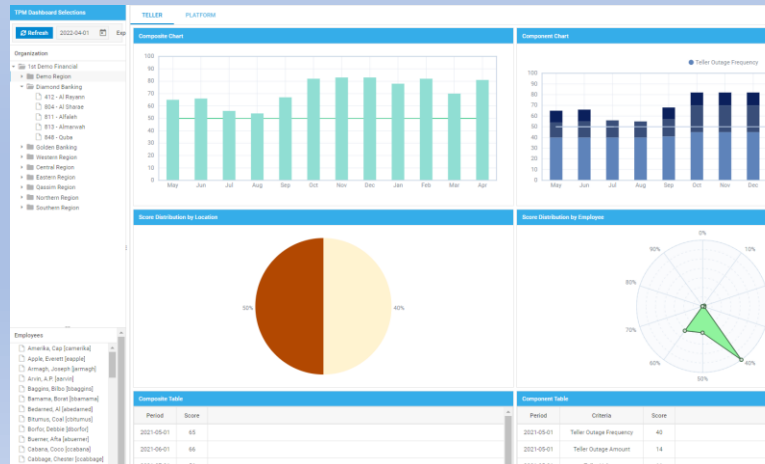
- Armagh, Joseph [jarmagh]
- Arvin, A.P. [aarvin]
- Bitumus, Coal [cbitumus]
- Cabbage, Chester [ccabbage]
- Cadabra, Abra [abcde]



Daily Staff Analysis Table						Weekly Staff Analysis Table		
Date	Trans	Weight	Actual	Project	Sched.	Week Of	Trans	Weight
	Total	Total	Hours	Hours	Hours		Total	Total
2022-04-27	3257	3512	397.0	549.4	105.5	2022-05-02	19438	21028
2022-04-28	2	2	1.0	1.3	.0	2022-05-09	14937	16111
2022-04-29	5507	5935	447.0	705.5	125.5	2022-05-16	20216	21855
2022-04-30	1808	1943	222.0	307.2	80.3	2022-05-23	19129	20702

Performance Measurement Scorecarding

- “You can’t improve what you don’t measure”
- Tiered Performance Measurement (TPM) – compare peer-groups
- Increase the percentage of high-performers
- Identify employees or branches that need improvement
- Supports any number of scorecards



Reports

- Answer management questions
- Dive deep into validating assumptions
- Robust set of standard reports in categories like:

- Branch Scheduling
- Float Scheduling
- Transaction Detail & Breakdown
- Cash Ordering
- Performance Measurements
- Benchmarking

7/30/2017 **Hourly by Teller**

		7 AM	8 AM	9 AM	10AM	11AM	12PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	Total
101 Main Office	Mon 11/14/16													
	Amerika, Cap	0	0	18	35	24	25	9	5	27	30	4	0	177
	Cabbage, Chester	0	0	1	0	0	5	16	18	10	11	1	0	62
	Coat, Cathy	0	0	7	2	4	18	1	3	12	6	0	0	53
	Dave, Carrie	0	0	1	0	0	4	0	0	0	4	1	0	10
	Borfor, Debbie	0	5	26	37	22	0	22	26	28	34	1	0	201
	Bayou, Grace	0	7	27	22	30	15	21	9	7	25	1	0	164
	Forrest, Mitch	0	0	0	0	0	0	1	0	0	3	3	0	7
	Actual Count	0	12	80	96	80	67	70	61	84	113	11	0	674
	Weighted	0	12	70	92	82	66	71	61	72	103	8	0	637
	Projected Staff	0	1	3	3	3	3-	3	2	3	3+	1	0	
Branch Total		0	12	80	96	80	67	70	61	84	113	11	0	674

Reports

My Saved Reports

My Hourly User

Staffing

12 Month by Day of Week

12 Month Branch Summary

Teller Balancing Summary

Staffing Baseline Summary Ext

Hourly by Type

Hourly by User

Staff Comparison Chart

Branch Staffing Summary

Teller Detail

TPM Base by Branch

Weekly Branch Comparison

Weekly Branch Summary

Weekly by Type

Weekly by User

Management

Staffing Baseline Summary

Benchmark Summary

Benchmark Detail

Selections

Organization

Search for

1st Demo Financial

City Center

101 - Main Office

102 - Valley Mall

103 - North Broadway

University

107 - University

108 - East River

110 - New Towne Centre

South End

Popperville

109 - Downtown

104 - Airport Road

105 - South End

106 - Industrial

Report: Hourly by User

Create Report

PDF

Date Ranges

Refresh

Save

Forget

Report Title

My Hourly User Report

Start Date *

2022-05-23

End Date *

2022-05-29

Services

All

My Reports

Report Title	Date	Forma	Delete	Config
Staffing				
Weekly Branch Comparison	06/06/2022	PDF		
Weekly Branch Comparison	06/06/2022	PDF		

Process Automation Forms

- Streamline your operations
- Reduce manual spreadsheet data entry
- Easily incorporate forms data into other modules like Analytics and Performance Measurement
- Set alerts and monitor form progress and completion
- Merge data from other systems
- Export data to other systems

The screenshot displays a web application interface for process automation forms, organized into three main panels:

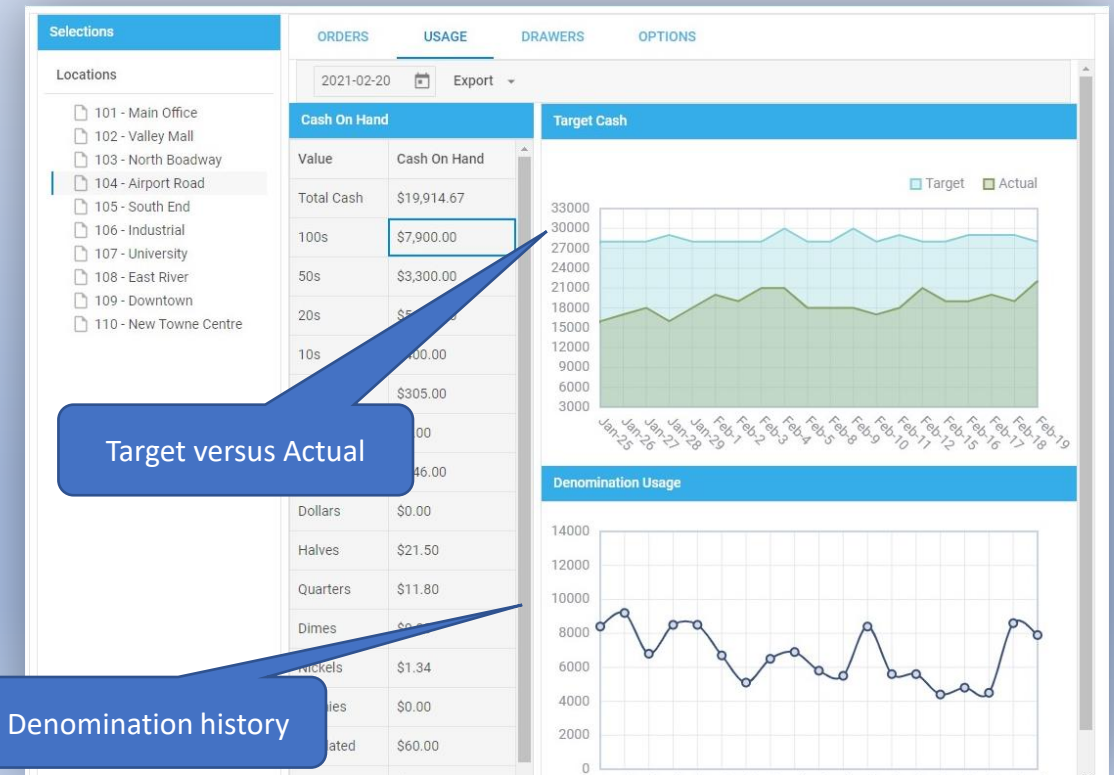
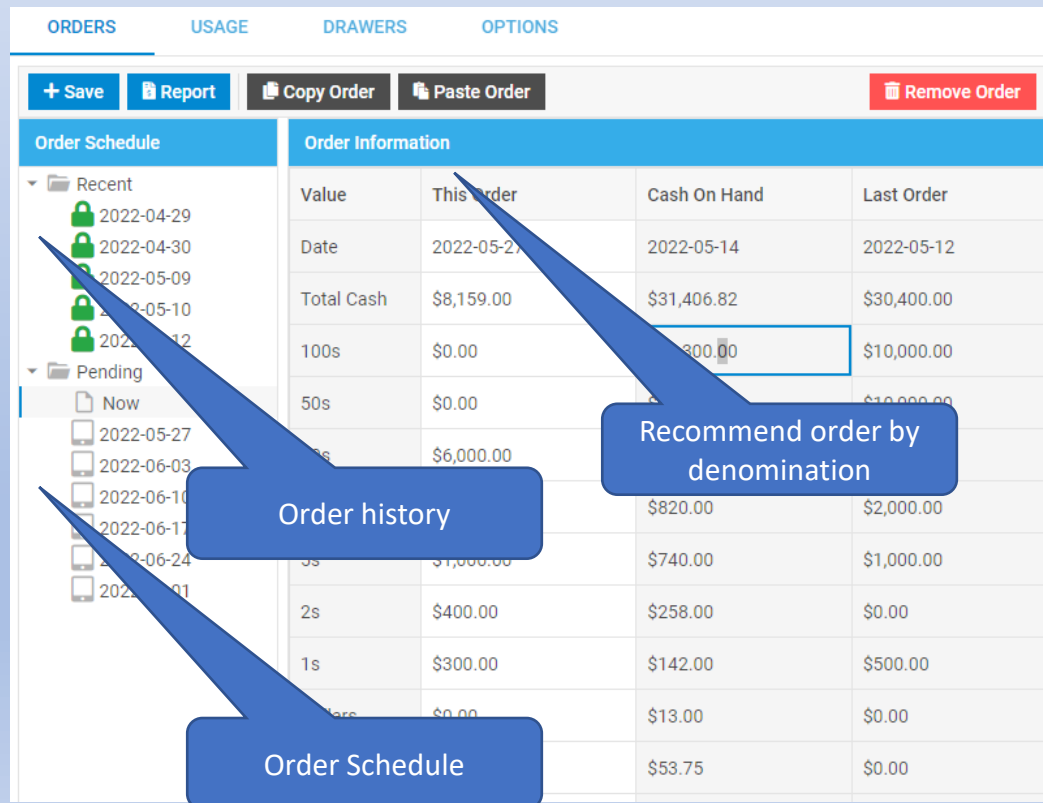
- My Forms (Left Panel):** Features a 'Refresh' button and a dropdown menu set to '101 - Main Office'. Below is a tree view of form categories: 'Active Forms' (containing 'Branch Forms [2022-05-01]', 'Cash Items Log [2022-05-01]', and 'Card Reconciliation [2022-05-10]'), 'Form Library' (containing 'Branch Forms', 'Assessment', 'Cash Items Log', 'Card Reconciliation', and 'Update Loans'), and 'Completed / Cancelled Forms' (containing 'Update Loans [2021-10-15]' and 'Loan Update [2015-03-18]').
- Active Form (Middle Panel):** Displays 'Form Information' for 'Card Reconciliation'. It includes a 'Submit' button (green) and a 'Decline' button (red). Fields shown are: Form Name (Card Reconciliation), Status (Active), Created By (dbasri), Owner Id, Open Date (with a help icon), and Next Date. A 'View PDF' button is at the bottom. Below this is a 'Folder Notes' section with '+ Add Note' and '- Remove Note' buttons. A note is visible: '2022-05-27 by David Basri, Form: Card Reconciliation, Card recon was late last month'.
- Card Reconciliation Fields (Right Panel):** Includes 'Refresh', 'Clear', 'Prev', 'Next', and 'Page 1 of 1' controls. It contains a table for data entry:

Field	Value
Previous Recon	2022-04-22
Previous Count	73
Issued Cards	22
Cards Received	0
Current Count	51
Over/Under	

Cash Ordering

- Create cash order schedules by branch
- Cash usage analysis & order recommendation
- Adjusts denominations and strap/roll by currency

- Calculates target cash level based on usage
- current cash on hand & denomination history
- Charts target versus actual



Data Integrations

Unlimited Interfaces

- Unique for each data source
- Can be
 - File import
 - Web Service
 - FTP
 - Database
 - Other methods
- Ability to export to other systems

Typical Data sources

- Transactions
 - Teller
 - Customer Service
 - Cash
- Human Resources
 - Active Employees
 - Employee Profile
 - PTO/Vacation Time
- Other Examples
 - Lobby Tracking
 - Cash Automation Devices
 - Check Capture
 - ITMS / Video Teller Activity
 - Loan Origination
 - Customer Satisfaction Surveys

Point Enterprises, Inc.
Rock Hill, SC U.S.A.
www.pointent.com

Quick Facts:

- PEI Founded 1996
- StaffPro PC version introduced 1999, browser version in 2001
- Largest client 650 branches. Smallest client 7 branches
- Developed entirely in-house by PEI
- Unlimited users
- Designed to be customizable without affecting integrity of the base application