



# StaffPro<sup>®</sup>

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



# 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 interface. On the left is a calendar grid showing staff availability for various branches from 5/30 to 6/4. The middle section lists requests with details like date, location, and assigned staff. The right section provides detailed information for a specific request or employee, including date, location, worktype, and time.

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, Not yet scheduled

**Request Detail (ID: 2871)**

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

**Employee Detail (Avery, Kinsey)**

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

Request detail list for selected pool or branch

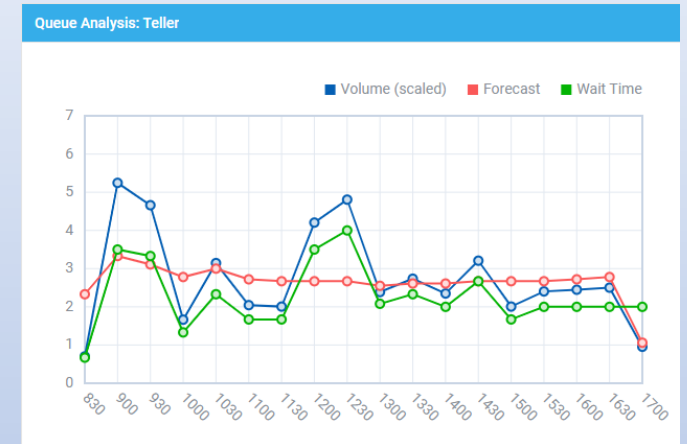
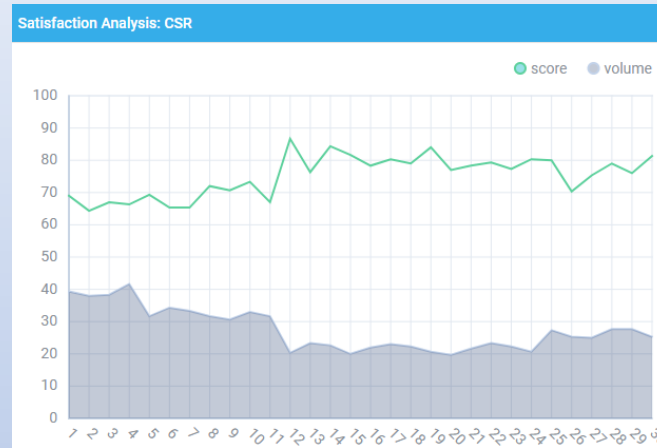
Request summary by pool for the selected week

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**

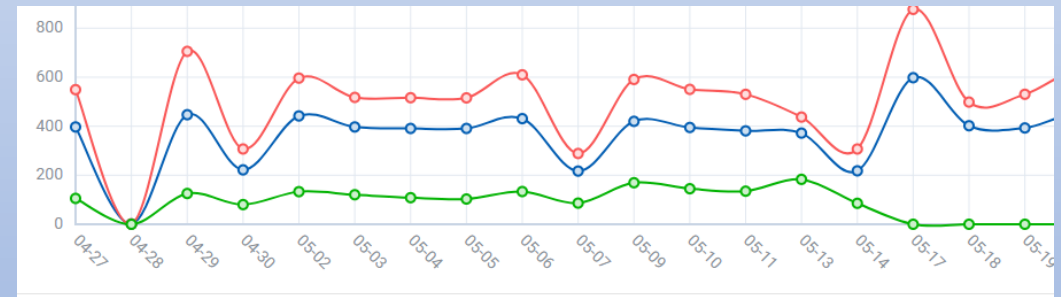
Refresh 2022-06-06 Export

**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**

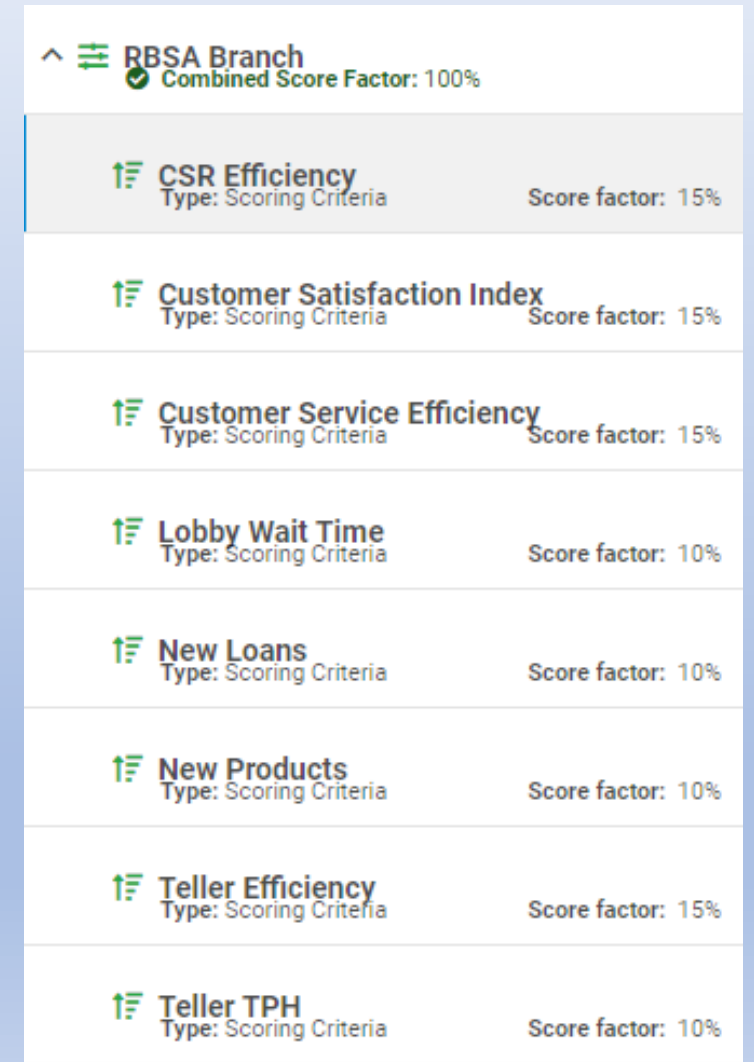
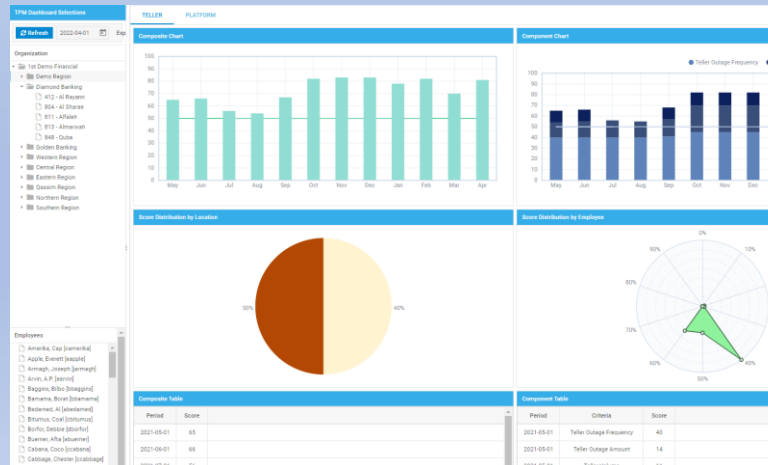
Date	Trans	Weight	Actual	Project	Sched.
	Total	Total	Hours	Hours	Hours
2022-04-27	3257	3512	397.0	549.4	105.5
2022-04-28	2	2	1.0	1.3	.0
2022-04-29	5507	5935	447.0	705.5	125.5
2022-04-30	1808	1943	222.0	307.2	80.3

**Weekly Staff Analysis Table**

Week Of	Trans	Weight
	Total	Total
2022-05-02	19438	21028
2022-05-09	14937	16111
2022-05-16	20216	21855
2022-05-23	19129	20702

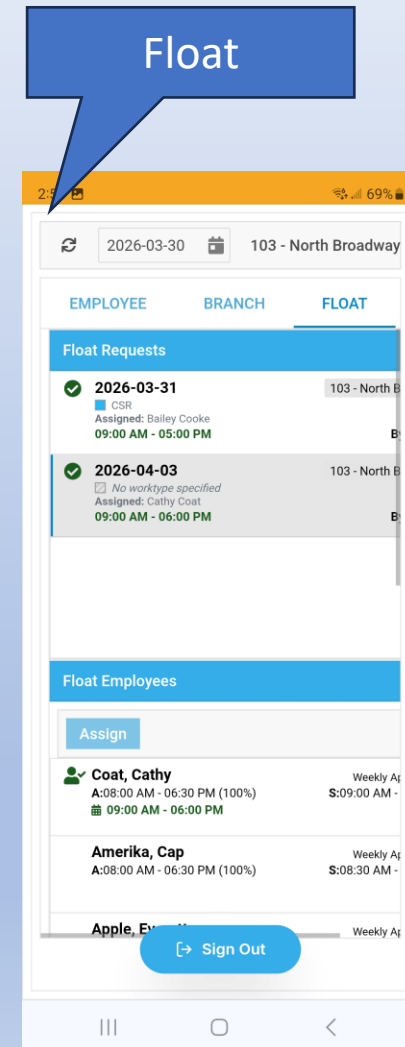
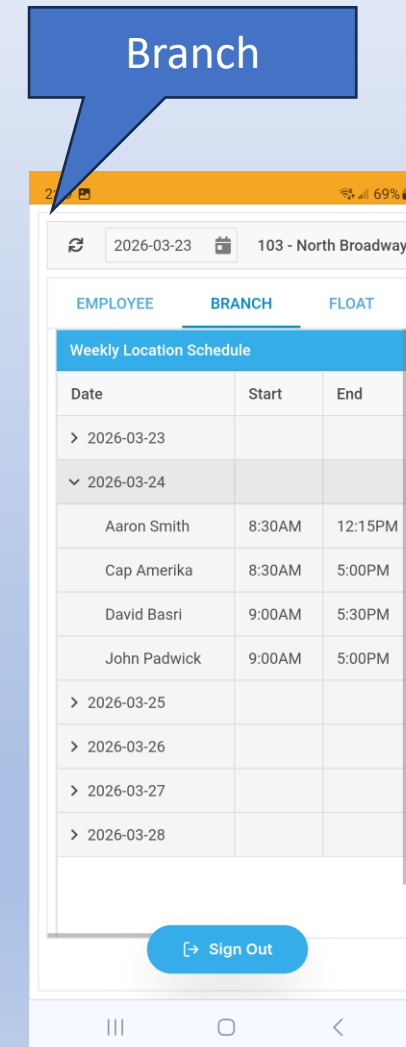
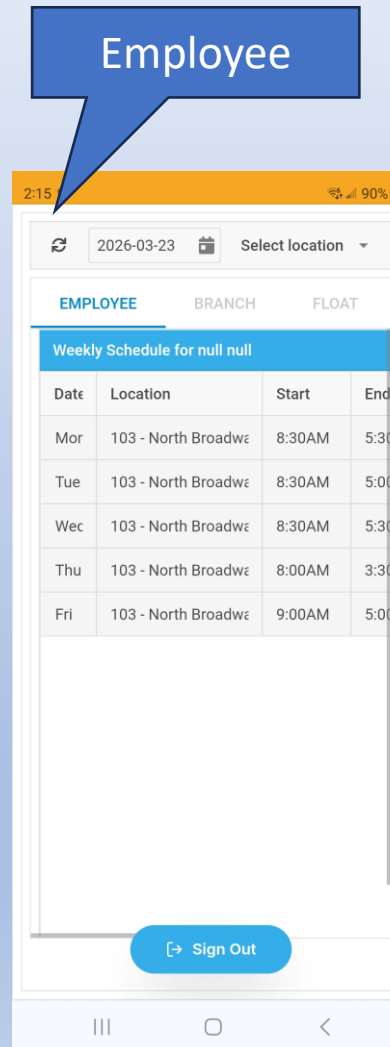
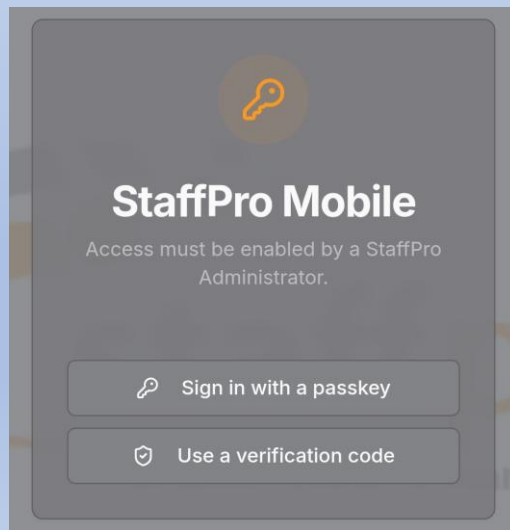
# Performance Measurement Scorecarding

- “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



# Mobile App

- Compatible with Android and Apple devices
- Authentication with passkeys or code verification
- Employees can view weekly individual schedules
- Managers can view weekly branch schedules
- Managers with access can reassign float requests



# 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
	<b>Weighted</b>	<b>0</b>	<b>12</b>	<b>70</b>	<b>92</b>	<b>82</b>	<b>66</b>	<b>71</b>	<b>61</b>	<b>72</b>	<b>103</b>	<b>8</b>	<b>0</b>	<b>637</b>
<b>Projected Staff</b>	<b>0</b>	<b>1</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>3-</b>	<b>3</b>	<b>2</b>	<b>3</b>	<b>3+</b>	<b>1</b>	<b>0</b>		
<b>Branch Total</b>	<b>0</b>	<b>12</b>	<b>80</b>	<b>96</b>	<b>80</b>	<b>67</b>	<b>70</b>	<b>61</b>	<b>84</b>	<b>113</b>	<b>11</b>	<b>0</b>	<b>674</b>	

**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				
<a href="#">Weekly Branch Comparison</a>	06/06/2022	PDF		
<a href="#">Weekly Branch Comparison</a>	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-based form interface with three main panels:

- My Forms:** A sidebar menu with a 'Refresh' button and a dropdown for '101 - Main Office'. It lists folders for 'Active Forms', 'Form Library', and 'Completed / Cancelled Forms'. Under 'Active Forms', 'Card Reconciliation [2022-05-10]' is selected.
- Active Form:** A central panel for 'Form Information' with 'Submit' and 'Decline' buttons. It shows details for 'Card Reconciliation' (Status: Active, Created By: dbasri). A 'View PDF' button is at the bottom. Below is a 'Folder Notes' section with '+ Add Note' and 'Remove Note' buttons, containing a note from 2022-05-27 by David Basri.
- Card Reconciliation Fields:** A table with 'Refresh', 'Clear', 'Prev', and 'Next' buttons. It shows data for 'Previous Recon' (2022-04-22), 'Previous Count' (73), 'Issued Cards' (22), 'Cards Received' (0), and 'Current Count' (51). The 'Over/Under' field is empty.

# 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

**Order Information**

Value	This Order	Cash On Hand	Last Order
Date	2022-05-27	2022-05-14	2022-05-12
Total Cash	\$8,159.00	\$31,406.82	\$30,400.00
100s	\$0.00	\$3,000.00	\$10,000.00
50s	\$0.00	\$0.00	\$10,000.00
20s	\$6,000.00	\$820.00	\$2,000.00
10s	\$0.00	\$740.00	\$1,000.00
5s	\$1,000.00	\$740.00	\$1,000.00
2s	\$400.00	\$258.00	\$0.00
1s	\$300.00	\$142.00	\$500.00
50c	\$0.00	\$13.00	\$0.00
25c	\$0.00	\$13.00	\$0.00
10c	\$53.75	\$53.75	\$0.00

**Cash On Hand**

Value	Cash On Hand
Total Cash	\$19,914.67
100s	\$7,900.00
50s	\$3,300.00
20s	\$5,000.00
10s	\$300.00
5s	\$305.00
2s	\$0.00
1s	\$46.00
Dollars	\$0.00
Halves	\$21.50
Quarters	\$11.80
Dimes	\$0.00
Nickels	\$1.34
Pennies	\$0.00
Unallocated	\$60.00

**Target Cash**

33000  
30000  
27000  
24000  
21000  
18000  
15000  
12000  
9000  
6000  
3000

Jan-25 Jan-26 Jan-27 Jan-28 Jan-29 Feb-1 Feb-2 Feb-3 Feb-4 Feb-5 Feb-8 Feb-9 Feb-10 Feb-11 Feb-12 Feb-15 Feb-16 Feb-17 Feb-19

**Denomination Usage**

14000  
12000  
10000  
8000  
6000  
4000  
2000  
0

# 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](http://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