

# Monthly Operational Overview

Jul 2016

Training Client Ltd

ISO **SOLVED**

## Overview

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**Client statistics**

**Mostly worked on by time**

**Mostly worked on by number of activities**

<b>Rank</b>	<b>Client</b>	<b>Hours</b>	<b>Rank</b>	<b>Client</b>	<b>No of</b>
1	Client A	880	1	Client C	92
2	Client B	762	2	Client B	45
3	Client C	150	3	Client A	18
4			4		
5			5		
6			6		
7			7		
8			8		
9			9		
10			10		
<b>Total time spent on clients' work</b>		<b>1792</b>			

## Workload statistics

**Bottleneck activity:**

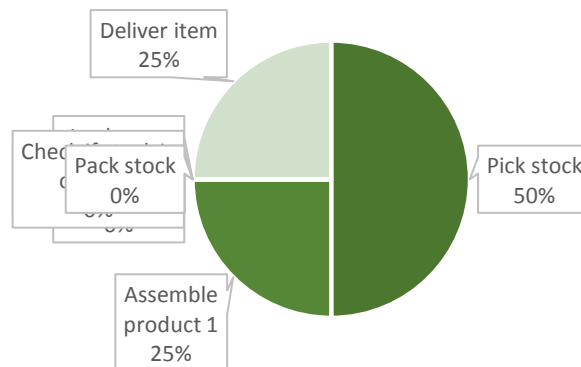
**Assemble product 1**

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
Buckets started	86	96	✗	396	96	✓
Buckets finished	95	78	✓	330	121	✓
Total active buckets	66	68	✗	66	39	✓
High priority	4	5	✓	4	20	✓
Normal priority	59	61	✓	59	15	✓
Low priority	3	2	✓	3	4	✓
Buckets split into sub-buckets	15	6	✓	105	54	✓
Average pieces of evidence per bucket	24.8	21.2	✓	24.8	5.6	✓
Average duration of a bucket (mins)	235.0	245.2	✓	235.0	350.2	✓
Average no. of people working on a bucket	8.5	8.6	✓	8.5	11.6	✓
Average comments per bucket	38.0	37.5	✓	38.0	45.7	✓

**Top 10 activities that were performed under a high priority status**

Pick stock	2	3	✓	2	2
Assemble product 1	1	0	✗	1	1
Inspect product	0	0		0	0
Plan order	0	0		0	0
Lookup or specify part drawings	0	0		0	0
Check if stock is on shelf	0	0		0	0
Paint part	0	0		0	0
Pack stock	0	0		0	0
Deliver item	1	2	✓	1	1

**High priority activities**



## Activities with active buckets

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
Pick stock	5	8	✗	5	2	✓
Assemble product 1	9	11	✗	9	5	✓
Inspect product	12	12		12	0	✓
Plan order	1	2	✗	1	3	✗
Lookup or specify part drawings	2	3	✗	2	2	
Check if stock is on shelf	15	5	✓	15	7	✓
Paint part	21	23	✗	21	0	✓
Employee update	1	0	✓	1	0	✓
Payroll	0	0		0	0	
Pack stock	13	15	✗	13	0	✓
Deliver item	3	2	✓	3	1	✓

## Sequence of activities followed for 80% of the time

Activity	Followed by	
Assemble product 1	Paint	40%
	Clean	35%
Clean	Pack item	90%
Pick items	Deliver	65%
	Assemble product 1	32%
Inspect product	Pack stock	85%
Paint part	Inspect product	95%
Plan order	Lookup or specify part drawings	85%
Lookup or specify part drawings	Check if stock is on shelf	90%
Check if stock is on shelf	Order items	72%
	Pick items	25%
Order items	Collect items	64%
	Received items	21%

## Activities and their documents

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
<b>Total Activities</b>	56	55	✓	56	43	✓
Activities with no responsible person	12	12		12	24	✓
Activities with no documents linked	24	25	✓	24	27	✓
Average documents per activity	1.5	1.4	✓	1.5	0.5	✓
<b>Questions on activities</b>						
Activities with questions to ask	26	25	✓	26	9	✓
Average answers per question	3.2	2.4	✓	3.2	1	✓
<b>Recurring buckets generated</b>						
per week	4	4		28	1	✓
per month	2	2		13	1	✓
per year	1	0	✓	5	0	✓
Alert if bucket not viewed	2	0	✗	7	0	✗
Alert if bucket not finished/transferred	1	0	✗	4	0	✗

### Questions asked the most

	Asked	Email alerts
Have you completed all the contact details?	45	5 ✗
Have you indicated client specific requirements?	32	6 ✗
Did you upload the application form?	29	3 ✗
Did you check that the contract is signed?	16	0 ✓
Is the chemicals returned to the cupboard?	7	0 ✓
Have you washed your hands after working with that chemicals?	2	0 ✓
Has the proposal been approved by QC?	1	0 ✓

## Duration of top 40 most significant activities

	Current		Previous	YTD
	Avg (mins) Duration	Times per month	Hours saved	Hours saved
1 Pick stock	35	3 503	204.3	1 430.4
2 Assemble product 1	25	4 301	179.2	1 254.5
3 Inspect product	30	1 296	(23.4)	(163.8)
4 Plan order	120	275	55.0	385.0
5 Lookup or specify part drawings	42	723	50.6	354.3
6 Check if stock is on shelf	3	7 603	38.0	266.1
7 Paint part	12	452	(15.0)	(105.0)
8 Employee update	35	5	0.3	2.0
9 Payroll	1 500	1	3.0	21.0
10 Pack stock	1	3 503	5.8	40.9
11 Deliver item	45	110	8.3	57.8
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40				
<b>Total savings</b>			<b>506.2</b>	<b>3 543.1</b>



## Top 40 activities as percentage of all activities of the average client bucket



## Activities and the average number of evidence pieces gathered

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
Pick stock	0.8	0.9	✗	0.9	0.5	✓
Assemble product 1	1.6	2.1	✗	1.5	0.7	✓
Inspect product	4.5	4.4	✓	4.0	0.9	✓
Plan order	0.1	0.0	✓	0.1	0.0	✓
Lookup or specify part drawings	1.2	1.1	✓	1.1	0.0	✓
Check if stock is on shelf	1.0	1.0		1.0	0.7	✓
Paint part	1.0	1.0		1.0	0.8	✓
Employee update	0.9	1.0	✗	0.8	0.5	✓
Payroll	0.0	0.0		0.0	0.0	
Pack stock	0.8	0.7	✓	0.6	0.0	✓
Deliver item	1.3	1.2	✓	1.2	0.8	✓

## Documents

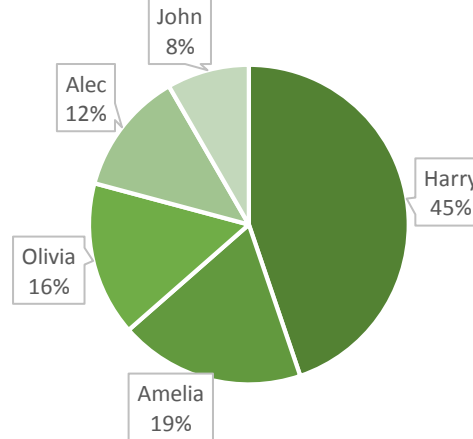
	Current month	Previous month	Δ	YTD	Previous YTD	Δ
<b>Total loaded</b>	233	230	✓	245	114	✓
Added	5	3	✓	131	34	✓
Removed	2	4	✗	8	4	✓
Updated	5	2	✓	345	48	✓
Viewed / used	3 262	3 066	✓	3 430	3 224	✓
Age of documents	180 days	160 days		180 days	160 days	
With a test	105	106	✗	110	106	✓
Without a test	128	125	✗	135	132	✗
Average # of questions per test	3.2	3.1	✓	1.2	0.2	✓
Average % of people completed test	23.0%	22.6%	✓	4.0%	0.0%	✓
Average tries to pass	2.3	2.5	✓	4.2	0.0	✗

### Top 24 documents most downloaded

### The most?

- Buckets
- Reception
- Selling our products
- Capturing evidence
- Check the quality
- Driver
- Debtors and creditors
- Assembly of product 1
- Assembly of product 2
- Employee joins
- Employee leaves
- Employee audit
- Employee update
- Payroll

Downloaded the most



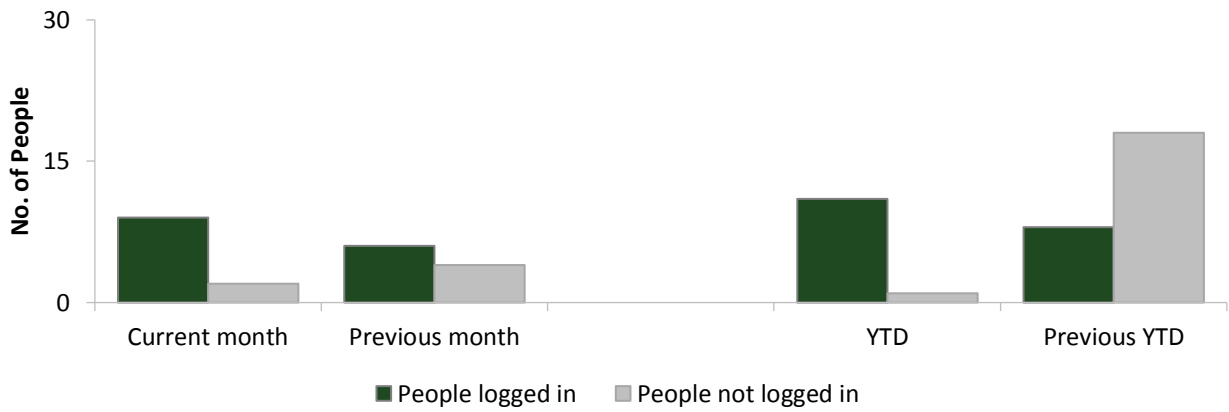
### Who downloaded the least documents?

Mia  
John

## People's access

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
<b>Total people loaded</b>	11	10		12	9	
People logged in	9	6	✓	11	8	✓
People not logged in	2	4	✓	1	18	✓
Average roles per person	2.3	2.2		2.3	1.5	
Number of users without cell number	0	1	✓	0	5	✓
Number of users without email address	0	0		0	6	✓

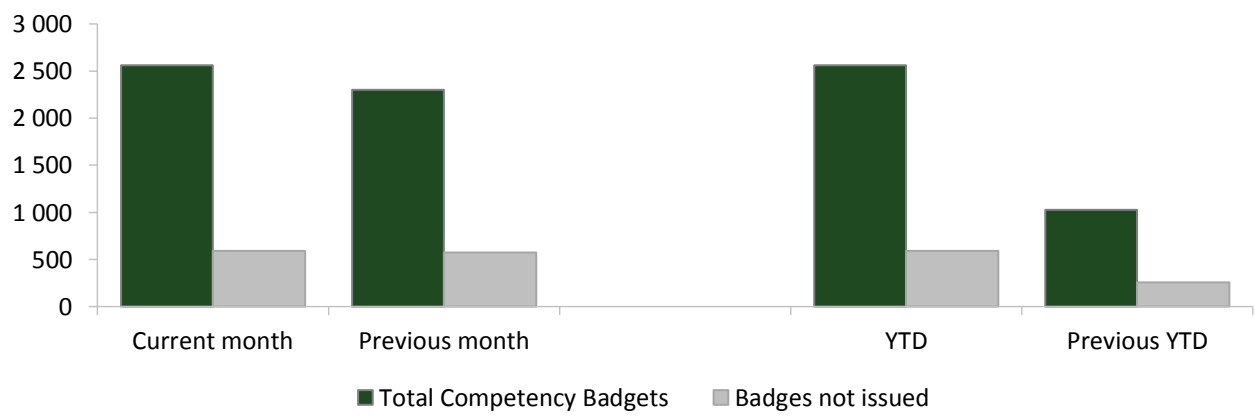
### Login



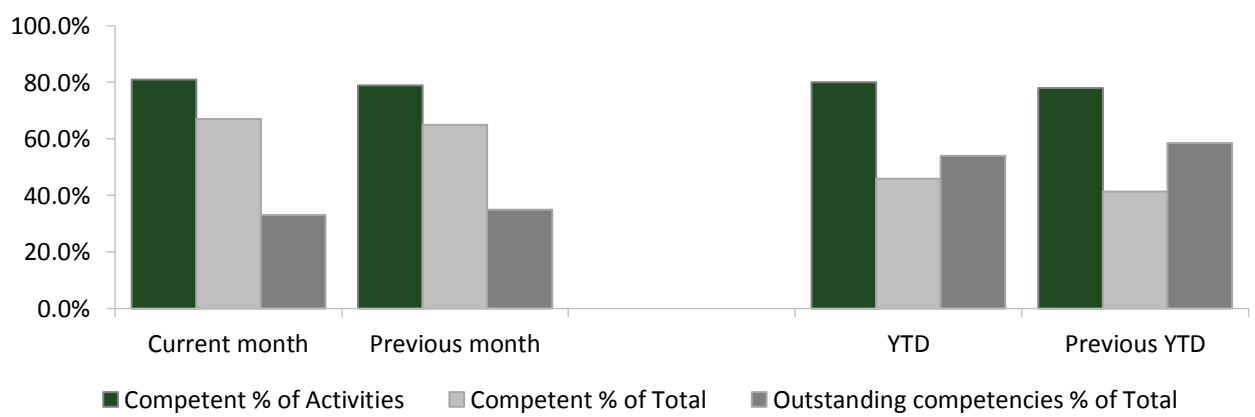
## Employee competencies

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
<b>Total employees loaded</b>	11	10	✓	11	9	✓
<b>Total documents loaded</b>	233	230	✓	245	114	✓
Total Competency Badgets	2 563	2 300	✓	2 563	1 026	✓
Badges not issued	589	575	✗	589	257	✗
Competent % of Activities	81.0%	79.0%	✓	80.0%	78.0%	✓
Competent % of Total	67.0%	65.0%	✓	46.0%	41.4%	✓
Outstanding competencies % of Total	33.0%	35.0%	✓	54.0%	58.6%	✓

### Competencies



### Competencies %



## Employee competencies

### Top 5 employees with most competencies

Harry	45
Olivia	34
Charlie	24
Alec	23
Emily	21

### Bottom 5 employees with least competencies

Jacob	1
Mia	1
Oliver	2
Jessica	2
John	5

### Activities with the most competencies

Buckets	45
Reception	34
Selling our products	32
Capturing evidence	23
Check the quality	21

### Activities with least competencies

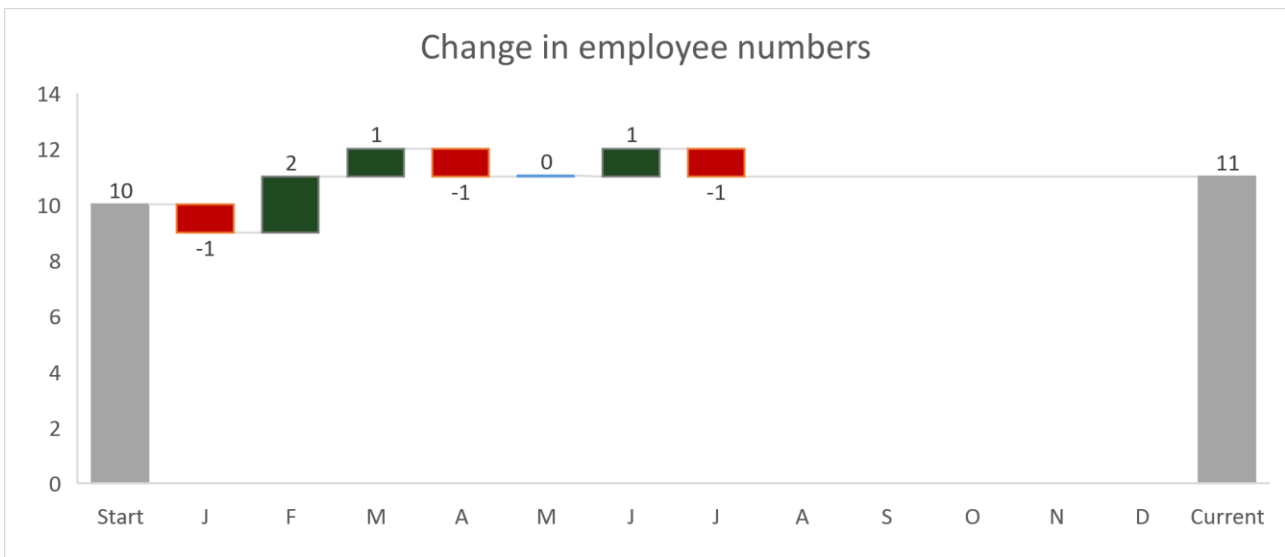
Driver	1
Debtors and creditors	2
Assembly of product 1	2
Assembly of product 2	2
Employee joins	3
Employee leaves	3
Employee audit	3
Employee update	3
Payroll	3

## Employee changes

### Employees joined

### Employees left

Jamie



### Items added to divisions in employee files

Agreement	1
Appointment	0
Bank Details	2
Disciplinary	1
General	2
Grievances	0
Leave	3
Medical	2
Payment	10
Qualifications	0
Resignation	1

### Reason why the employee files were accessed

Query	15
Updates	3
Leaves	1
Joins	0
Audit	1

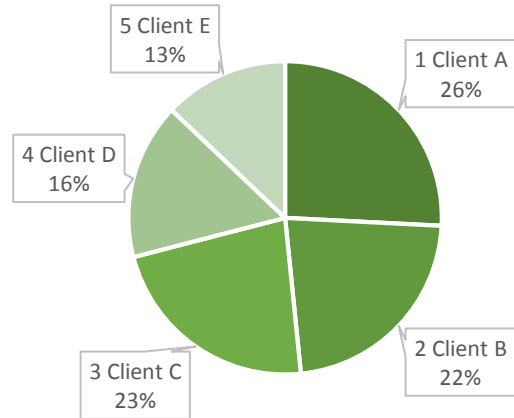
### Who accessed the employee files?

Rank	Employee	Times
1	Amelia	20

## Availability

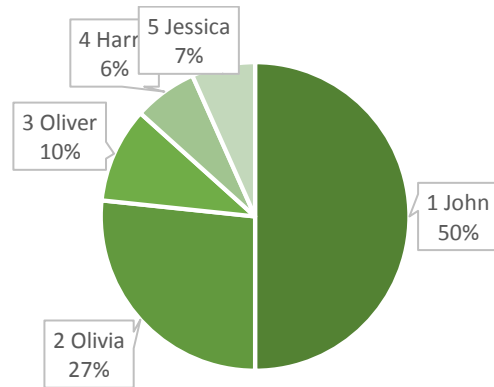
### Clients that left the most messages

Rank	Client name	Times
1	Client A	8
2	Client B	7
3	Client C	7
4	Client D	5
5	Client E	4



### Person who received the most messages

Rank	Employee name	Times
1	John	15
2	Olivia	8
3	Oliver	3
4	Harry	2
5	Jessica	2

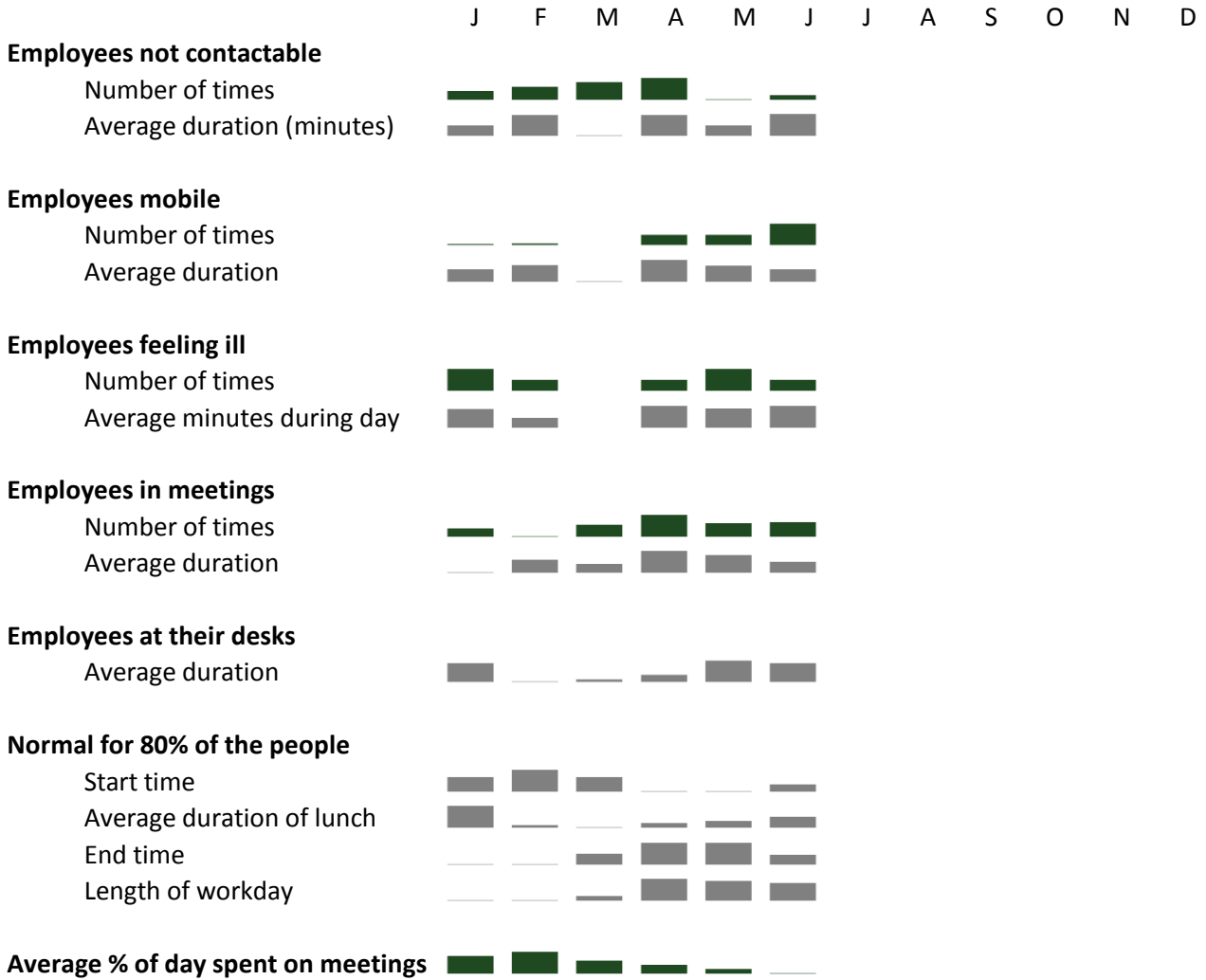


### Number of messages taken





## Availability



**Rank Persons who were the most sick during the month**

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- 1 Mia
- 2 Harry
- 3
- 4
- 5

**Rank Persons on leave most during the month**

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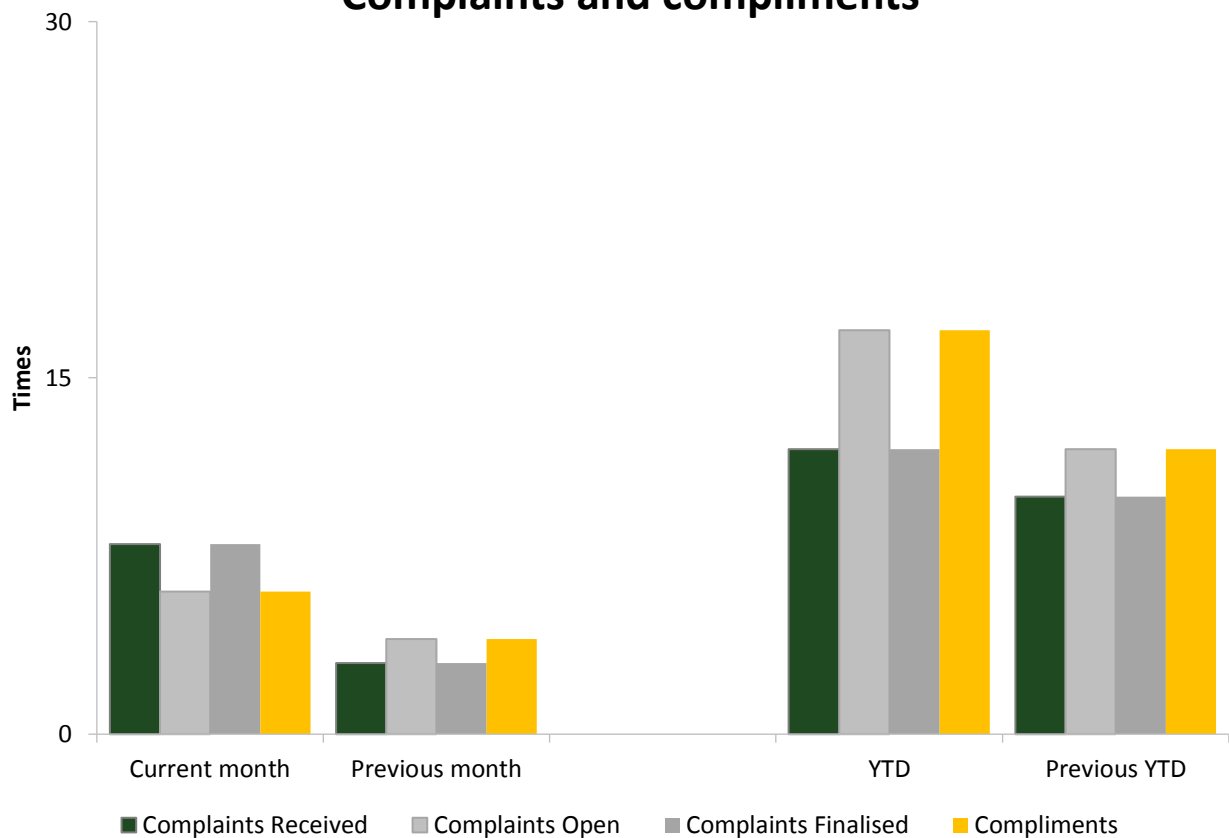
- 1 Mia
- 2 Harry
- 3
- 4
- 5

## Complaints and compliments

Complaints Received  
Complaints Open  
Complaints Finalised  
Compliments

	Current month	Previous month	Δ	YTD	Previous YTD	Δ
Complaints Received	4	5	✓	15	13	✗
Complaints Open	3	7	✓	3	7	✓
Complaints Finalised	8	3	✓	12	10	✓
Compliments	6	4	✓	17	12	✓

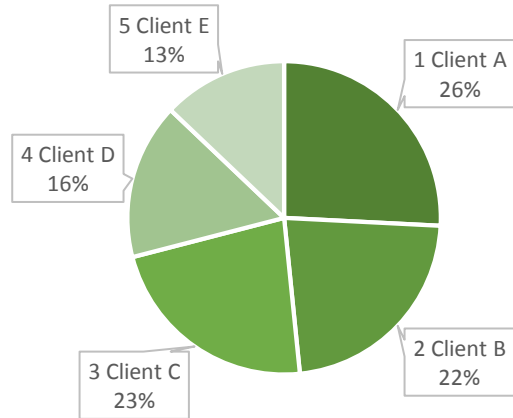
### Complaints and compliments



## Deliveries and collections

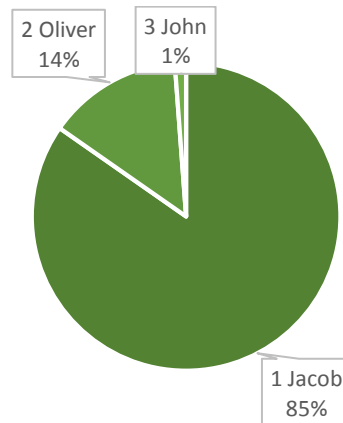
### Clients delivered to mostly

Rank	Client name	Times
1	Client A	8
2	Client B	7
3	Client C	7
4	Client D	5
5	Client E	4



### Drivers that made the most deliveries

Rank	Employee name	Times
1	Jacob	72
2	Oliver	12
3	John	1



### Number of points for delivery and/or collection

## Deliveries



### Delivery statistics

- Average distance of a delivery
- Average buckets on a vehicle
- Average points serviced per day
- Average points per bucket
- Average time at driver



**Risks**

**Bottleneck** **3.5 days of work is building up**

Alert if bucket not viewed	2
Alert if bucket not finished/transferred	1
Delivery points per driver in his queue	8.5

**Activities performed only by one person**

Employee

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Driver	Jacob
Debtors and creditors	Mia

**Top 10 number of activities completed without evidence**

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- Check the quality
- Assembly of product 2
- Assembly of product 1

## Conclusion and recommendations

- 1) Refer to the bottleneck management. The buildup is too high.
- 2) Priorities are under control, check that orders are not running late.