

BRANCHEssentials

A Daniel Penn Associates Software Product



The *Essential* in teller staffing.

Daniel Penn Associates has been serving the financial sector since 1978, offering a wide range of consulting services to help our client institutions improve service and profitability. DPA's full scope of consulting services across more than 300 projects includes a diverse multi-national Fortune 1000 and government client base. In the financial sector we offer subject matter experts and skills in staffing and capacity modeling, process improvement/redesign, productivity improvement, Lean, Six Sigma, spend management and strategic sourcing, cost reduction and more. Our clients have rated our services as 'Outstanding' in our latest Dun & Bradstreet rating. We invite you to find out why they did.

Want better control over staffing and operations? BRANCHEssentials, a Daniel Penn Associates software product, will keep your bank branches running at tiptop shape.

Maximize service and profitability by right-sizing teller staff with a consistent, rational method for developing requirements and schedules based on:

- Customer service standards
- Workload demand
- Customer arrival profile

Refine staffing. Maximize branch profits.

Based on forecasted transactions, customer arrival patterns and other branch activities (night bags, ATM processing etc.), BRANCHEssentials:

- Converts forecast volumes to hours required via reasonable work standards
- Provides at-a-glance summary of all work requirements by type by hour and day for each branch
- Allows fine-tuning of daily requirements for holidays, promotions, and other irregular volume days
- Allows fine-tuning of hourly requirements to accommodate paydays and other peak times for the local bank community

Simplified Scheduling

- Drop down list of tellers
- Provides hour-by-hour requirements
- Shows variance between scheduled hours and required hours

Teller	Shift Start	Shift End	Lunch Start	Lunch End	Scheduled Work Hours
Ann	8:30 AM	4:30 PM	11:00 AM	11:30 AM	7.5
Bill	8:30 AM	4:30 PM	11:30 AM	12:00 PM	7.5
Cathy	8:30 AM	4:30 PM	12:00 PM	12:30 PM	7.5
Diane	8:30 AM	4:30 PM	12:30 PM	1:00 PM	7.5
Jeff	9:30 AM	1:30 PM			4.0
					0.0
					0.0
					0.0
					0.0
					0.0
Total Scheduled					34.0
Total Required					29.7



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BRANCH**Essentials**

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It's all about the
proper *proportions.*

BRANCH**Essentials** provides everything you need (and nothing you don't) to maintain a well-balanced teller population, well-managed time and profitable results. There's no new hardware or software to install or maintain. Accurate reporting and data integrity are assured through access to a secure server.

Architecture

- Microsoft technology
- Windows Server 2003
- Internet Information Server (IIS)
- SQL Server

Support

- Implementation and user training
- Consulting and technical support, including Help Desk
- Clear, easy-to-use documentation
- Free upgrades

Accessible. Secure.

- Web-based. No data exchanged with bank system
- Data stored at DPA's secure server facility
- Application is accessed via Virtual Private Network (VPN)
- Fault Tolerant environment

Reporting

- Daily/weekly branch report available online in realtime
- Easy to use for gathering, analyzing and reporting data and graphs from branch reports by week, month, quarter, six-month or year periods
- Enables branches to be grouped into regions and reported together in total
- Data can be exported to Excel for analysis

Elmwood		Week Ending: 6/9/2007					
	800	200	200	50	200	Week Total	
Actual CU Total Time	200	200	200	200	200	1,100	
Actual Window Total Time	700	800	800	1,100	800	4,400	
Actual Total (Counter+Other) Time	900	700	800	1,300	1,100	5,800	
Planned Total Time	840	720	840	1,120	910	5,430	
Actual % of Plan	103.42%	99.11%	101.32%	98.21%	99.74%	97.88%	
ATO Emergencies	20	10	10	10	10	60	
Counter Bags	0	0	0	0	0	0	
Missing Orders	0	0	0	0	0	0	
Night Bags	10	0	0	0	0	10	
Hours at Work	30.00	32.00	30.00	30.00	27.00	152.00	
Potential Responsibility at Work	30.00	32.00	30.00	30.00	27.00	152.00	
Branches Adhering to Scheduled Hrs	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
Branch Utilization	24.89	24.89	23.20	27.50	29.75	130.23	
Actual Utilization	25.00	24.18	22.88	29.00	25.71	126.77	
Potential Utilization Adjustment	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
Actual Utilization Adjustment	100.42%	97.54%	102.70%	99.30%	100.00%	99.78%	

BRANCH**Essentials**:

- Balances customer service and teller cost
- Easy, flexible staffing and scheduling
- Promotes branch accountability
- Priced right and sized right for your needs

Contact Daniel Penn Associates today for a free demonstration at **860.232.8577** or **info@danielpenn.com**.



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