JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Bank Branch Teller and Service Desk Staffing Forecast Training Course

8 – 12 March 2027
Milan

Bank Branch Teller and Service Desk Staffing Forecast Training Course

Ref: 2528_96015 **Date:** 8 – 12 March 2027 **Location:** Milan **Fees:** 6200 GBP

Bank Branch Teller and Service Desk Staffing Forecast is a 1-week training course for human resources planners and business partners who support retail branch networks, built around one branch staffing forecast workbook. Footfall is shifting to digital channels while complex advice still needs people at the counter, so every vacancy and transfer now carries more weight. Jupiter Prime Training presents this course on Bank Branch Teller and Service Desk Staffing Forecast.

Why Bank Branch Teller and Service Desk Staffing Forecast Matters Now

Customers move routine deposits and payments to mobile apps and self-service kiosks, yet queues still spike on salary days and month ends. A bank that forecasts counter demand well redeploys tellers into advice roles and keeps service levels steady; one that forecasts badly pays for overtime in one branch and idle staff in the next. The course rests on queueing logic, transaction time studies and scenario planning.

Who Gains Most from Bank Branch Teller and Service Desk Staffing Forecast

- human resources planners who build annual headcount budgets for branch networks
- human resources business partners who advise regional branch managers on vacancies and transfers
- Branch operations analysts who record transaction volumes and handling times
- Workforce scheduling staff who set rotas, shift patterns and leave calendars
- Talent leads who plan cross-skilling of tellers into service desk and advice posts

A retail bank or microfinance network gains most when human resources planners, branch operations and scheduling staff attend together.

Bank Branch Teller and Service Desk Staffing Forecast Capabilities

Participants turn counter volumes and handling times into defensible branch headcount.

- Calculate counter workload from transaction counts and average handling times — regional branch manager
- Build peak-day and peak-hour demand profiles for each branch — scheduling team
- Apply shrinkage allowances for leave, training and absence to raw requirements — headcount budget owner
- Test staffing scenarios for channel migration, branch closure and new openings — network strategy
- Design cross-skilling and succession cover for teller and service desk posts — talent lead
- Communicate the staffing forecast and its assumptions to finance — budget committee

Key Bank Branch Teller and Service Desk Staffing Forecast Terms

- Average handling time — the mean minutes a teller or service desk officer spends completing one transaction type, including wrap-up.
- Footfall profile — the pattern of customer arrivals at a branch by hour, weekday and month.
- Shrinkage — the share of paid hours lost to leave, training, sickness and breaks, added on top of raw workload.
- Service level target — the proportion of customers served within an agreed waiting time at the counter.
- Full-time equivalent — a unit that expresses part-time and full-time staff as a count of standard working weeks.
- Channel migration rate — the pace at which a transaction type moves from the counter to digital or self-service channels.

Bank Branch Teller and Service Desk Staffing Forecast Day by Day

Day 1: Branch Demand Drivers and Counter Workload

- Transaction Type Catalogue — Which Counter Activities Drive Teller Hours
- Footfall Counts and Queue Logs — Where Branch Demand Really Peaks
- Time and Motion Sampling — Setting Credible Average Handling Times
- Salary Day and Month-End Spikes — Planning for Predictable Surges
- Branch Segmentation by Format — Flagship, Satellite and Kiosk Staffing Rules

Day 2: Converting Workload into Staff Numbers

- Workload-to-Hours Conversion — Turning Volumes into Required Counter Hours
- Queueing Tables for Counters — Matching Staff to Waiting Time Targets
- Shrinkage Build-Up — Leave, Training and Absence Allowances per Branch
- Full-Time Equivalent Roll-Up — From Branch Hours to Network Headcount
- Part-Time and Floating Teller Pools — Covering Peaks Without Permanent Hires

Day 3: Supply, Skills and Succession at the Counter

- Teller Attrition and Tenure Analysis — Forecasting Exits Branch by Branch
- Skills Inventory for Service Desk Posts — Spotting Advice and Product Gaps
- Cross-Skilling Pathways — Moving Tellers into Service Desk Roles
- Succession Cover for Branch Supervisors — Avoiding Single Points of Failure
- Internal Transfer Rules — Balancing Surplus and Shortage Across Branches

Day 4: Scenarios and the Headcount Budget

- Channel Migration Scenarios — Counter Volumes Under Slow and Fast Digital Uptake
- Branch Closure and Opening Cases — Redeployment Versus Hiring Choices
- Service Level Trade-Off Curves — Waiting Time Against Staffing Cost
- Headcount Budget Bridge — Explaining Movements Between Budget Years to Finance
- Rota Pattern Options — Split Shifts, Weekend Cover and Leave Windows

Day 5: Practising the Branch Staffing Forecast Workbook

- Case Branch Demand Build — Applying Footfall Profiles and Handling Times
- Case Branch Requirement — Applying Queueing Tables and Shrinkage
- Case Network Scenario — Applying Migration and Closure Assumptions
- Peer Challenge Session — Testing Assumptions Against Branch Manager Questions
- Completed Branch Staffing Forecast Workbook — Ready for Budget Committee Review

Applying Bank Branch Teller and Service Desk Staffing Forecast After the Course

- Run a two-week time and motion sample in three branches of different formats and refresh the average handling times.
- Rebuild next year's counter headcount for one region with explicit shrinkage and channel migration scenarios.

Bank Branch Teller and Service Desk Staffing Forecast Questions FAQ

What is Bank Branch Teller and Service Desk Staffing Forecast and why does it matter now?

It is the method of estimating how many tellers and service desk officers each branch needs from transaction volumes, handling times and shrinkage. It matters because digital uptake changes counter demand unevenly across a network.

Which roles gain most from Bank Branch Teller and Service Desk Staffing Forecast training?

Human resources planners and business partners supporting branch networks gain most, with branch operations analysts and scheduling staff.

How does Bank Branch Teller and Service Desk Staffing Forecast differ from general workforce planning courses?

It works at counter level, with queueing tables and handling times for one service channel. General workforce planning courses stay at organisation level.

What will you bring back from Bank Branch Teller and Service Desk Staffing Forecast training?

You bring back a staffing workbook for one case branch and its region. It holds demand profiles, scenarios and a budget bridge.

Bank Branch Teller and Service Desk Staffing Forecast: The Way Forward

The branch staffing forecast workbook first informs the counter headcount line in the next annual budget. Human resources planners, regional branch managers and finance use it together. After its first use, revisit the handling time samples and the channel migration rate, since both drift as customers adopt digital services.