



## Example of Planning / Forecasting Job Description

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Our company is searching for experienced candidates for the position of planning / forecasting. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

### Responsibilities for planning / forecasting

- Responsible for presenting and raising awareness to Senior Leadership on program elements as it pertains to staffing, forecasting and capacity
- Support oversight of weekly reporting on key program metrics and provide data insights as it pertains to program demand and capacity
- Help evolve systems and tools to support more robust capacity planning and forecasting
- Exce
- Leading a high-performing team through effective selection and development of talent
- Creating credible forecasts of baseline production and expenses from our existing agency plant
- Modeling the 'efficient frontier' of what initiatives should lead to what levels of production, and contributing to ongoing efforts to better understand the underlying economics of the small business insurance industry
- Leading the annual planning process related to new business submissions – using multivariate analyses to forecast how much production we should see in any given area
- Forecasting the impact of initiatives on our new business production (e.g., what does a change in claims service satisfaction mean to submission volume?)
- Developing processes to attribute shortfalls/unexpected gains in new business production to certain factors (e.g., geography X or independent

## Qualifications for planning / forecasting

- Be analytical and inquisitive by nature, able to understand and spot trends in complex data and interpret them
- Work well as part of a team, with the ability to effectively influence and manage stakeholders
- Pursuing college degree in related field of study
- Ability to establish and maintain effective relationships with management staff, associates, vendors and general public
- Creates fulfillment plans to align call center management, corporate real estate, staffing and training for optimal efficiency
- Reviews, updates, and improves workforce planning and forecasting methods to provide reliable, consistent forecast and plan data