

# Planning and Controlling Store Productivity



## WHY

It is crucial for our stores to be productive and run efficiently to sustain and grow our business. The foundation for running a productive store is planning, monitoring, and controlling hours correctly.

## WHAT

### Core Hours

Hours required for day-to-day running of the store, based on store factors e.g. store size, type of baler and units per receipt.

### Additional Hours

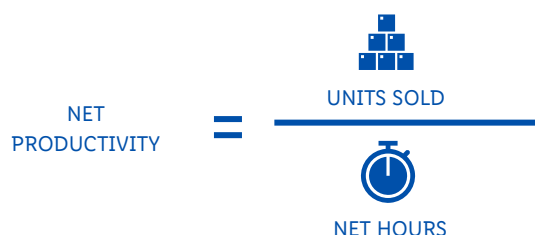
Hours required to complete non-day-to-day tasks e.g. re-merchandising stock.

### Net Hours

Total hours used by a store to complete day-to-day tasks and additional tasks.



### Net Productivity

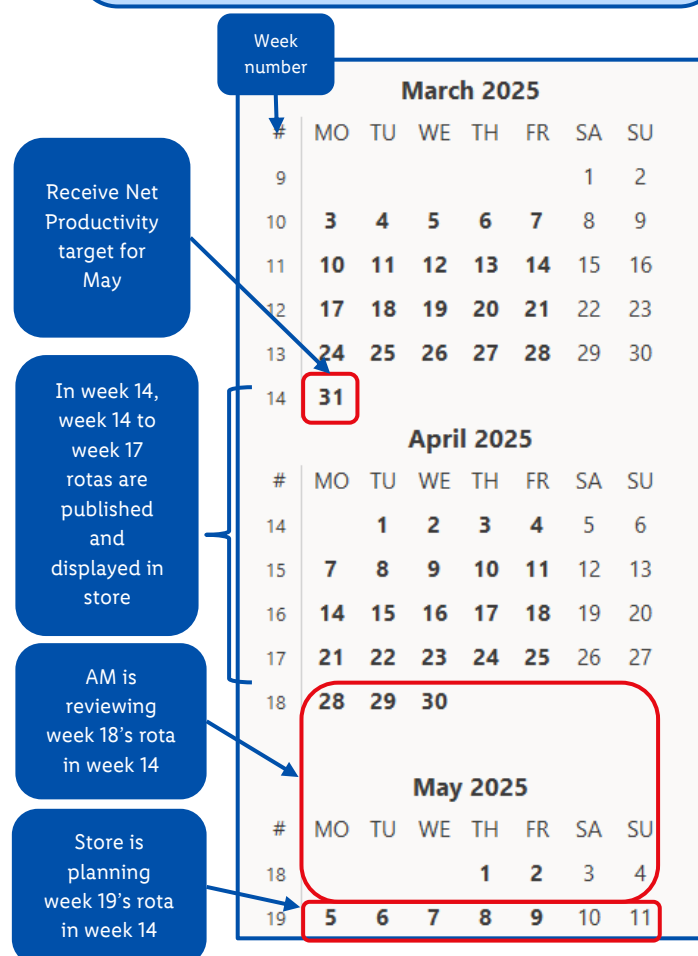


### Net Productivity Target

A monthly Net Productivity target is provided to each store, by close of business, on a Monday five weeks prior to the month beginning. This target is provided on the **Store Core Hours Guide\***.

### EXAMPLE

If a store is in week 14, it will receive its May 2025 target by 31.03.2025 to plan the rota for week 19, by the end of week 14. This is because four weeks of rota needs to be published and displayed in store, and the Area Manager (AM) needs a week to review rotas before they are published.



The **\*Store Core Hours Guide**, located in the LiDocs Weekly Reporting Suite, includes monthly and annual Net Productivity targets, and offers guidance on planning weekly Core Hours based on a range of units.

## REMEMBER

**For reporting purposes, each month starts from the 1<sup>st</sup> Monday:**

For example, the target for March 2025, is the target for week 10 to week 14 i.e. 03.03.2025 to 06.04.2025 and the target for April 2025 is for week 15 to week 18 i.e. 07.04.2025 to 04.05.2025.

The Store Core Hours Guide states the weeks the target is relevant for, to avoid confusion.

## IMPORTANT

**Achieving the monthly target is a minimum expectation:**

Stores should plan to overachieve their monthly Net Productivity target by using less hours, in a month, than their monthly target allows, given actual unit sales.

$$\text{NET MONTHLY HOURS USED} < \frac{\text{UNITS SOLD}}{\text{MONTHLY NET PRODUCTIVITY TARGET}}$$

# HOW

## How to plan Productivity:

Forecast units with PEP2.0

Use the Store Core Hours Guide to plan Core Hours

Plan Additional Hours:  
- WMP  
- Non-WMP

## Planning Core Hours

When stores receive their target sheet for the new financial year, they should use this in combination with the Area Manager Base Rota Support Tool to plan their PEP 2.0 base rota templates.

## BEST PRACTICE

Plan rotas after the Weekly Management Plan (WMP) is released to ensure all hours and tasks are covered.

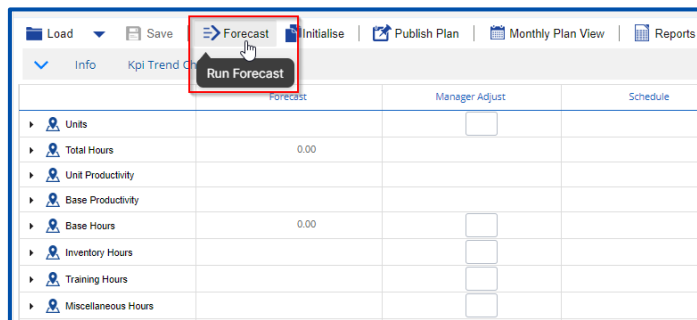
When planning weekly rotas, stores should first plan units for the week by using the PEP 2.0 forecast button.

March's Net Productivity target is for week 10 to the end of week 14

April's Net Productivity target is for week 15 to the end of week 18

March 2025							
#	MO	TU	WE	TH	FR	SA	SU
9						1	2
10	3	4	5	6	7	8	9
11	10	11	12	13	14	15	16
12	17	18	19	20	21	22	23
13	24	25	26	27	28	29	30
14	31						
April 2025							
#	MO	TU	WE	TH	FR	SA	SU
14		1	2	3	4	5	6
15	7	8	9	10	11	12	13
16	14	15	16	17	18	19	20
17	21	22	23	24	25	26	27
18	28	29	30				
May 2025							
#	MO	TU	WE	TH	FR	SA	SU
18				1	2	3	4
19	5	6	7	8	9	10	11

**Note:** Always use the latest Store Core Hours Guide from the Reporting Suite for accurate planning. Targets may change mid-month due to unforeseen tasks.



If the manager feels the forecast isn't accurate, they can adjust via the manager adjust column and leave a comment to explain the adjustment.

Units	Forecast	Manager Adjust	Schedule	Actual	Comments
Monday	24,224	25,000	25,000		
Tuesday	22,867	25,000	25,000		Local Festival: Expecting an increase in unit sales
Wednesday	17,112				
Thursday	21,244				
Friday	24,584				
Saturday	24,584				
Sunday	17,692				

Stores should use the planned weekly units figure in conjunction with the **Store Core Hours Guide** to find out how many **Core Hours** the store should be using to complete day-to-day tasks in a week.

The store can then plan Core Hours per day into PEP 2.0, in the Core Hours section, in the relevant manager adjust rows. The store should ensure Core Hours planned are no more than suggested in the **Store Core Hours Guide**.

### EXAMPLE

In the image below, if a store plans to sell 172,068 units a week, they need to plan 639 Core Hours for the week on the Weekly Plan View on PEP 2.0.

Monthly Productivity Target: 230 Annual Productivity Target: 234			
Store Core Hours Guide   Store 2   Month (Week X to Y)			
Units	Core Operational Hours	Units	Core Operational Hours
63,848	319	127,697	502
63,858	319	128,002	506
63,868	318	128,308	502
63,878	322	128,614	504
63,888	326	128,919	508
63,898	333	129,225	512
63,908	337	129,531	516
63,918	340	129,836	519
63,928	344	130,142	523
63,938	348	130,448	527
63,948	351	130,754	530
63,958	355	131,060	534
63,968	359	131,366	538
63,978	362	131,672	541
63,988	366	131,978	545
63,998	370	132,284	549
64,008	374	132,590	553
64,018	378	132,896	557
64,028	382	133,202	561
64,038	386	133,508	565
64,048	390	133,814	569
64,058	394	134,120	573
64,068	398	134,426	577
64,078	402	134,732	581
64,088	406	135,038	585
64,098	410	135,344	589
64,108	414	135,650	593
64,118	418	135,956	597
64,128	422	136,262	601
64,138	426	136,568	605
64,148	430	136,874	609
64,158	434	137,180	613
64,168	438	137,486	617
64,178	442	137,792	621
64,188	446	138,098	625
64,198	450	138,404	629
64,208	454	138,710	633
64,218	458	139,016	637
64,228	462	139,322	641
64,238	466	139,628	645
64,248	470	139,934	649
64,258	474	140,240	653
64,268	478	140,546	657
64,278	482	140,852	661
64,288	486	141,158	665
64,298	490	141,464	669
64,308	494	141,770	673
64,318	498	142,076	677
64,328	502	142,382	681
64,338	506	142,688	685
64,348	510	142,994	689
64,358	514	143,300	693
64,368	518	143,606	697
64,378	522	143,912	701
64,388	526	144,218	705
64,398	530	144,524	709
64,408	534	144,830	713
64,418	538	145,136	717
64,428	542	145,442	721
64,438	546	145,748	725
64,448	550	146,054	729
64,458	554	146,360	733
64,468	558	146,666	737
64,478	562	146,972	741
64,488	566	147,278	745
64,498	570	147,584	749
64,508	574	147,890	753
64,518	578	148,196	757
64,528	582	148,502	761
64,538	586	148,808	765
64,548	590	149,114	769
64,558	594	149,420	773
64,568	598	149,726	777
64,578	602	150,032	781
64,588	606	150,338	785
64,598	610	150,644	789
64,608	614	150,950	793
64,618	618	151,256	797
64,628	622	151,562	801
64,638	626	151,868	805
64,648	630	152,174	809
64,658	634	152,480	813
64,668	638	152,786	817
64,678	642	153,092	821
64,688	646	153,398	825
64,698	650	153,704	829
64,708	654	154,010	833
64,718	658	154,316	837
64,728	662	154,622	841
64,738	666	154,928	845
64,748	670	155,234	849
64,758	674	155,540	853
64,768	678	155,846	857
64,778	682	156,152	861
64,788	686	156,458	865
64,798	690	156,764	869
64,808	694	157,070	873
64,818	698	157,376	877
64,828	702	157,682	881
64,838	706	157,988	885
64,848	710	158,294	889
64,858	714	158,600	893
64,868	718	158,906	897
64,878	722	159,212	901
64,888	726	159,518	905
64,898	730	159,824	909
64,908	734	160,130	913
64,918	738	160,436	917
64,928	742	160,742	921
64,938	746	161,048	925
64,948	750	161,354	929
64,958	754	161,660	933
64,968	758	161,966	937
64,978	762	162,272	941
64,988	766	162,578	945
64,998	770	162,884	949
65,008	774	163,190	953
65,018	778	163,496	957
65,028	782	163,802	961
65,038	786	164,108	965
65,048	790	164,414	969
65,058	794	164,720	973
65,068	798	165,026	977
65,078	802	165,332	981
65,088	806	165,638	985
65,098	810	165,944	989
65,108	814	166,250	993
65,118	818	166,556	997
65,128	822	166,862	1001
65,138	826	167,168	1005
65,148	830	167,474	1009
65,158	834	167,780	1013
65,168	838	168,086	1017
65,178	842	168,392	1021
65,188	846	168,698	1025
65,198	850	169,004	1029
65,208	854	169,310	1033
65,218	858	169,616	1037
65,228	862	169,922	1041
65,238	866	170,228	1045
65,248	870	170,534	1049
65,258	874	170,840	1053
65,268	878	171,146	1057
65,278	882	171,452	1061
65,288	886	171,758	1065
65,298	890	172,064	1069
65,308	894	172,370	1073
65,318	898	172,676	1077
65,328	902	172,982	1081
65,338	906	173,288	1085
65,348	910	173,594	1089
65,358	914	173,900	1093
65,368	918	174,206	1097
65,378	922	174,512	1101
65,388	926	174,818	1105
65,398	930	175,124	1109
65,408	934	175,430	1113
65,418	938	175,736	1117
65,428	942	176,042	1121
65,438	946	176,348	1125
65,448	950	176,654	1129
65,458	954	176,960	1133
65,468	958	177,266	1137
65,478	962	177,572	1141
65,488	966	177,878	1145
65,498	970	178,184	1149
65,508	974	178,490	1153
65,518	978	178,796	1157
65,528	982	179,102	1161
65,538	986	179,408	1165
65,548	990	179,714	1169
65,558	994	180,020	1173
65,568	998	180,326	1177
65,578	1002	180,632	1181
65,588	1006	180,938	1185
65,598	1010	181,244	1189
65,608	1014	181,550	1193
65,618	1018	181,856	1197
65,628	1022	182,162	1201
65,638	1026	182,468	1205
65,648	1030	182,774	1209
65,658	1034	183,080	1213
65,668	1038	183,386	1217
65,678	1042	183,692	1221
65,688	1046	184,000	1225
65,698	1050	184,306	1229
65,708	1054	184,612	1233
65,718	1058	184,918	1237
65,728	1062	185,224	1241
65,738	1066	185,530	1245
65,748	1070	185,836	1249
65,758	1074	186,142	1253
65,768	1078	186,448	1257
65,778	1082	186,754	1261
65,788	1086	187,060	1265
65,798	1090	187,366	1269
65,808	1094	187,672	1273
65,818	1098	187,978	1277
65,828	1102	188,284	1281
65,838	1106	188,590	1285
65,848	1110	188,896	1289
65,858	1114	189,202	1293
65,868	1118	189,508	1297
65,878	1122	189,814	1301
65,888	1126	190,120	1305
65,898	1130	190,426	1309
65,908	1134	190,732	1313
65,918	1138	191,038	1317
65,928	1142	191,344	1321
65,938	1146	191,650	1325
65,948	1150	191,956	1329
65,958	1154	192,262	1333
65,968	1158	192,568	1337
65,978	1162	192,874	1341
65,988	1166	193,180	1345
65,998	1170	193,486	1349
66,008	1174	193,792	1353
66,018	1178	194,098	1357
66,028	1182	194,404	1361
66,038	1186	194,710	1365
66,048	1190	195,016	1369
66,058	1194	195,322	1373
66,068	1198	195,628	1377
66,078	1202	195,934	1381
66,088	1206	196,240	1385
66,098	1210	196,546	1389
66,108	1214	196,852	1393
66,118	1218	197,158	1397
66,128	1222	197,464	1401
66,138	1226	197,770	1405
66,148	1230	198,076	1409
66,158	1234	198,382	1413
66,168	1238	198,688	1417
66,178	1242	198,994	1421
66,188	1246	199,300	1425
66,198	1250	199,606	1429
66,208	1254	199,912	1433
66,218	1258	200,218	1437
66,228	1262	200,524	1441
66,238	1266	200,830	1445
66,248	1270	201,136	1449
66,258	1274	201,442	1453
66,268	1278	201,748	1457
66,278	1282	202,054	1461
66,288	1286	202,360	1465
66,298	1290	202,666	1469
66,308	1294	202,972	1473
66,318	1298	203,278	1477
66,328	1302	203,584	1481
66,338	1306	203,890	1485
66,348	1310	204,196	1489
66,358	1314	204,502	1493
66,368	1318	204,808	1497
66,378	1322	205,114	1501
66,388	1326	205,420	1505
66,398	1330	205,726	1509
66,408	1334	206,032	1513
66,418	1338	206,338	1517
66,428	1342	206,644	1521
66,438	1346	206,950	1525
66,448	1350	207,256	1529
66,458	1354	207,562	1533
66,468	1358	207,868	1537
66,478	1362	208,174	1541
66,488	1366	208,480	1545
66,498	1370	208,786	1549
66,508	1374	209,092	1553
66,518	1378	209,398	1557
66,528	1382	209,704	1561
66,538	1386	210,010	1565
66,548	1390	210,316	1569
66,558	1394	210,622	1573
66,568	1398	210,928	1577
66,578	1402	211,234	1581
66,588	1406	211,540	1585
66,598	1410	211,846	1589
66,608	1414	212,152	1593
66,618	1418	212,458	1597
66,628	1422	212,764	1601
66,638	1426	213,070	1

## How to control Productivity:

Monitor unit sales daily and adjust hours

Monitor Net Productivity weekly and adjust hours

Monitor Net Productivity monthly and adjust hours

## Monitoring Net Productivity Daily

**Frequency reports** should be used to track daily cumulative unit sales and adjust hours needed to meet daily and weekly Productivity targets set on PEP 2.0.

### EXAMPLE

Below is a frequency report. The store has sold 9,852 units by 16:00. The SMT should compare this with a frequency report from another day (reference day) when the store achieved the unit sales plan.

Based on this review, the store should adjust hours to achieve the daily Net Productivity target whilst **ensuring all tasks are completed**.

On the reference day, the store had sold 10,235 units by 16:00. Therefore, the store is not on track to sell the units it had planned for the current day.

### Reference Day

Customer	Units	Accum. Unit Sales
00:00 - 00:59	0	0
01:00 - 01:59	0	0
02:00 - 02:59	0	0
03:00 - 03:59	0	0
04:00 - 04:59	0	0
05:00 - 05:59	0	0
06:00 - 06:59	0	0
07:00 - 07:59	0	0
08:00 - 08:59	34	328
09:00 - 09:59	64	786
10:00 - 10:59	92	1,300
11:00 - 11:59	113	1,481
12:00 - 12:59	119	1,837
13:00 - 13:59	115	1,945
14:00 - 14:59	117	1,147
15:00 - 15:59	120	1,411
16:00 - 16:59	81	968
17:00 - 17:59	106	1,258
18:00 - 18:59	88	1,374
19:00 - 19:59	74	976
20:00 - 20:59	43	570
21:00 - 21:59	22	211
22:00 - 22:59	2	34
23:00 - 23:59	0	0
	1,190	15,626
		15,626

## Monitoring Productivity Weekly

The weekly **PEP & Prod pack** and **Monthly Plan View on PEP 2.0** should be used to track productivity weekly. If last week's performance was not optimal, store's must react by adjusting hours in the remaining days/weeks, within the month, to achieve their monthly Net Productivity target.

### EXAMPLE

After reviewing the PEP & Prod pack, adjust hours planned for the rest of the month by the hours suggested. In the example below, the store needs to **save 10 hours** in the remainder of the month to achieve its monthly Net Productivity target given actual unit sales and the plan for the rest of the month.

### Current Day

Customer	Units	Accum. Unit Sales
00:00 - 00:59	0	0
01:00 - 01:59	0	0
02:00 - 02:59	0	0
03:00 - 03:59	0	0
04:00 - 04:59	0	0
05:00 - 05:59	0	0
06:00 - 06:59	0	0
07:00 - 07:59	0	0
08:00 - 08:59	40	409
09:00 - 09:59	75	997
10:00 - 10:59	77	1,295
11:00 - 11:59	131	1,759
12:00 - 12:59	119	1,883
13:00 - 13:59	96	1,222
14:00 - 14:59	107	1,472
15:00 - 15:59	50	815
16:00 - 16:59	0	0
17:00 - 17:59	0	0
18:00 - 18:59	0	0
19:00 - 19:59	0	0
20:00 - 20:59	0	0
21:00 - 21:59	0	0
22:00 - 22:59	0	0
23:00 - 23:59	0	0
	695	9,852
		9,852

Monthly Target:	230	Weeks remaining:	1	Annual Target:	232
MTD Actual:	228	Hours over/underspend:	10	YTD Actual:	229
Predicted Month Result:	229	Hours per week to cut/invest:	10		
Regional Rank 42					
Current Month			Next Month		
Productivity			Productivity		
Planned	216	221	224	219	226
Actual	225	226	225	225	226
Unit Sales & Hours			Unit Sales & Hours		
Planned Units	176,000	182,000	183,000	180,000	180,000
Actual Unit Sales	185,000	179,000	179,000	175,000	175,000
Unit Forecast Run	3/4	3/4	3/4	3/4	3/4
Manager Planned Hours	813	820	818	823	3,274
Rota Hours	813	825	818	823	3,274
Actual Hours	820	820	840	840	3,303
Rota Compliance			Rota Compliance		
Unfilled Shifts	0	1	0	0	0
Initial Fill Unfill Rate	100%	95%	92%	91%	95%
Manager Change Rate	30%	9%	10%	10%	10%
Schedule Warnings	5	1	4	2	2
Rota Version	1	2	1	2	2
Published	✓	✓	✓	✓	✓
Printed	✓	✓	✓	✓	✓

## BEST PRACTICE

When the store knows how many hours they need to adjust in the remainder of the month. The store should utilise the **Monthly Plan View on PEP 2.0**.

This will allow stores to get an overview of planned hours and tasks. Then the store can make a more informed decision on which weeks/days they can adjust hours in to cause the **least disruption to customer and colleague experience**.

## Monitoring Productivity Monthly

**Monthly Business Review Report (BRR)** should be used at the end of the month to assess if the monthly Net Productivity target has been achieved. If not, a plan of action needs to be made to over-achieve targets in the following months, to achieve the Store's annual Net Productivity target.

Business Review Report   Cost   YTD		Mar	Apr	May	Jun	Jul	Aug	Sep
Store	X0X	YTD						

Productivity		Mar	Apr	May	Jun	Jul	Aug	Sep
Target	Units/hr	236	242	246	230	235	230	240
Actual	Units/hr	237	243	247	231	235	230	241
Diff. vs Target	Units/hr	1	1	1	1	0	0	1
Rate	(%)	1	1	1	1	1	1	1

## Achieving Net Hours

If the Net Hours are planned, monitored, and controlled on a daily, weekly, and monthly basis (as above), the store will achieve its monthly and annual net productivity targets.

## REMEMBER

### Do not use MIS to track Productivity.

Figures for Productivity on MIS won't match the reports mentioned above as MIS targets are fixed at the start of the year, whereas Productivity is dynamic throughout the year.

## WHEN



### Yearly:

The AM and Store Manager (SM) should utilise the Base Rota Support Tool to update PEP 2.0 base rota templates in line with the new productivity targets for the coming financial year.

### Quarterly:

During the Business Review Meeting (BRM), the AM and SM should review previous productivity performance and assess whether the current rota templates are sufficient or require updating.

### Monthly:

The SM needs to review performance and adjust months to come, accordingly, to ensure the store will overachieve its Net Productivity target.

The SM should also revisit base rotas to ensure they are still fit-for-purpose, if not, the SM should create new base rotas or make updates.

### Weekly:

The SM and Deputy Store Manager (DSM) are responsible for accurately planning and creating rotas, ensuring the store does not exceed the hours it should use.

The SM should regularly track productivity performance, throughout the week, and adjust rotas to ensure the store over-achieves its monthly Net Productivity target.



## REMEMBER

### Agree changes before re-publishing the rota.

Any changes made to published rotas must be agreed with colleagues before re-publishing.

## Daily:

The SMT are responsible for monitoring the net hours used daily, to ensure net productivity is achieved.

# WHO

## Responsibilities:

### Store Colleagues:

Are responsible for achieving the minimum efficiency expectations for:



- Scan speed – found on store scan speed reporting
- Delivery working times for each product group

PRODUCT GROUP	Maximum pallet working time (mins)
Ambient	45
Bulks	10
Bakery	20
Bread	15
Chiller	40
Chiller con	20
Milk	15
FOOP	35
TKT	30
Fruit & Veg	25
MPF	40
NF	25
LO Ambient	25
Plants & flowers	15
Newspapers and magazines	5

Pallet times are based on time needed to **work a full Euro Pallet (EP)** e.g. 15 mins to work 4 milk trollies, as 4 milk trollies form a EP.

This doesn't include time required to prepare e.g. down stack and count NF stock.

## SMT:

Are responsible for ensuring net productivity is achieved by using the frequency report.

## SM and DSM:

Are responsible for planning and controlling productivity.

The SM is also responsible for checking rotas are accurate and planned to over-achieve monthly Net productivity targets.

## AM:

Is responsible for monitoring and following up on productivity performance.