Capacity Planning for Optimizing Staffing Level [New]

The **Capacity Planning** report helps you to analyze gaps, anticipate demand, and optimize your staffing levels by allowing you to:

- View the upcoming capacity of a Booking Calendar.
- Compare the upcoming capacity to past demand of a Booking Calendar.

This feature is especially useful for team scheduling scenarios such as consulting, sales, healthcare, or customer success, where managing staff availability and meeting capacity is critical.

How to View Upcoming Booking Calendar Capacity

Navigating to Capacity Planning

1. Click **Analytics** in the left-hand navigation menu.
2. Select **Capacity Planning**.

Capacity Planning displays estimated available booking slots for the selected Booking Calendar. Each color-coded block represents a time frame (based on the selected View) and reflects utilization.

Hovering over a block shows detailed metrics, such as:

- Utilization percentage.
- The number of bookings made vs. the total available capacity.

ℹ️

Note: This is only an estimation of available capacity and may change depending on the actual booking times and calendar settings such as **Workload rules**, **Starting, and Buffer Times**

How to Adjust the View of Capacity Planning Report

Selecting the Booking Calendar

Use the **Booking Calendar** dropdown at the top of **Capacity Planning** to choose which Booking Calendar's capacity you want to view.

Choosing a Time Range

Use the **View by** toggle at the top of the pane to switch between the following 2 views:

- **Day:** Shows daily capacity for the upcoming week in hourly blocks.
- **Week:** Shows weekly capacity for the upcoming month in daily blocks.

Adjusting the Display Hours (Day View Only)

1. Click **Display Hours** on the left side of the pane.

2. Select the hours you want to display.

3. Click **Apply** to update the view.

ℹ️

Note: The display hours you select persist in your browser for future sessions.

How to Compare Booking Calendar Capacity to Past Demand

You can compare your upcoming booking capacity to similar historical booking data for a specific time frame. This helps you identify potential staffing gaps and adjust availability.

Enabling the Comparison

1. Select the **Compare with** checkbox.

2. Choose the past time range to compare, from the adjacent dropdown.

3. Click **Done** to apply the comparison.

When enabled, each block shows a comparison indicator, to help you compare past demand with current capacity.

- **Red Indicator: Under Capacity -** Your Booking Calendar has received **at least 20% more** meetings in the past compared to the capacity you have now.

- **Blue Indicator: Over Capacity** - Your Booking Calendar has received **at least 20% less** meetings in the past compared to the capacity you have now

- **No Indicator:** Your Booking Calendar has received meetings **within the 20% range** in the past compared to the capacity you have now.