



Workforce Management

The Contact Center's Easy Button?



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Workforce management technology has a profound impact on the day-to-day lives of the people working in the contact center. It defines agent's working hours, when they take breaks, lunches, attend training or go on vacation. The ripple of change that occurs with a workforce management implementation, however, extends beyond the agents to the management team, the IT department, the training group and human resources, among others.

Despite the far-reaching impact of workforce management technology, businesses often overlook the need to establish a strong foundation based on sound processes and procedures — before putting a system in place. Instead they get caught up in the bells and whistles of an automated system, and buy into the misnomer that workforce management is some sort of “easy button.” But it's not.

Achieving optimal results with a workforce management deployment takes a symbiotic relationship between the people, processes and technology in the center. When one of the elements is out of balance, efficiency and effectiveness inevitably suffer.

Whether the organization is putting a workforce management system in place for the first time, replacing an existing system or just trying to breathe new life into one that's already implemented, there are four main things that can help ensure success:

- Build a Solid Planning Foundation
- Develop a Workforce Management Team
- Get Key Stakeholders to Embrace the Change
- Create a Culture of Continuous Improvement

1. Build a Solid Planning Foundation

Even before the company selects a workforce management system, operational goals should be re-evaluated. Take a look at objectives such as average handle time (AHT), average speed of answer (ASA) and first call resolution. Then assess current time-off-management, training and performance evaluation processes. Assessing the current situation versus desired results will help identify areas for improvement.

Being armed with a wish list of operational improvements will help the center identify and prioritize workforce management system requirements. For example, let's say a center staffed with 150 average agents per day has determined one of its key goals is to reduce non-productive time. Right now, schedule adherence among the group averages 82 percent. But the center would like to see a 10 percent productivity increase. Based on this information, finding a system with an effective real-time adherence module will be important because, as seen in Sidebar A, increasing productivity could save the company more than \$350,000 a year.

Sidebar A

Basic Schedule Adherence Calculation:

- 150 agents = 1,125 hours phone time per day
- 1,125 hours phone time per day @ \$11 per hour = \$12,375 per day
- Adherence Goal = 92%
- Planned Non-productive Time = 8%
- 8% Non-productive Time = \$990 per day
- \$990 per day x 365 days = \$361,350 a year
- Each percentage point of this 8% equals just over \$45,000 of either additional savings or additional nonproduct time cost

Once new operational goals such as adherence have been defined, the center should start considering the types of processes it will put in place to support those goals. In the example just discussed, the center set a 92 percent adherence goal. However, it will be difficult to meet that new standard without a process in place for entering schedule exceptions into the workforce management system. When schedules are not adjusted to reflect the numerous exceptions that take place on a daily basis, adherence results will suffer.

Setting goals and establishing processes, however, will meet with limited success without a mechanism in place to define how results will be measured and shared. From an adherence perspective, if the goal is 92 percent, then shrinkage is 8 percent. Using that baseline, adherence should be measured by agent, team and management unit in order to see how everyone is performing to plan. Naturally the center will then want to share those results. Reports can be delivered to agent desktops, showing them how their performance compares to their peers. At the same time, management may want to see adherence results by team with the ability to drill-down to the individual level.

By taking the time to identify goals, put sound processes in place and determine the best way to measure and share results, the center has established a solid planning foundation. The next step is to build a workforce planning team.

2. Develop a Workforce Management Team

First-level training by vendors can teach employees what buttons to push to create a forecast and run a schedule. It takes an experienced workforce planner, however, to recognize forecasting and scheduling anomalies that put service goals at risk. For example, someone with limited experience may not think to include a schedule variance to accommodate a new marketing campaign.

Yet either because the center doesn't see the need or simply due to budget limitations, many contact centers don't employ an experienced, full-time planner. Instead, workforce planning gets added to the supervisor's laundry list of responsibilities, data entry staff gets moved into the position or there's a part-timer put in place. Whatever the case, without someone dedicated to workforce planning, the system will be underutilized and the results will surely reflect a lack of focus.

Therefore, in an ideal world, the cost of hiring a workforce planner should be built into the Workforce Management (WFM) implementation budget. If hiring an experienced planner isn't possible, look internally to identify someone that can grow into the position.

Once that person has been identified, start the education process by getting the employee first-level workforce management system training. Once the employee is proficient in one skill, add additional training until they are fully capable of running the system. Also, look to resources such as the Call Center School, the Call Center Networking (CCNG), International Customer Management Institute (ICMI) and the Society of Workforce Planning Professionals (SWPP) for classes that will complement system training with industry best practices.

3. Get Key Stakeholders to Embrace the Change

Beyond establishing a planning foundation and building a WFM team, getting buy-in from key stakeholders is the organization's next biggest challenge. As discussed, WFM brings a ripple of change that can be felt across the organization. Whether the team fights that change or embraces it oftentimes depends on how things are communicated.

If key constituents – agents, managers, supervisors, HR, IT, etc. – are left in the dark until a world of change is thrust upon them, they will likely fight it. Agents will have the perception that WFM is just another ploy to control their lives, management will be frustrated and neither HR nor IT will be supportive. Furthermore, it won't be long before executive management wonders if they really got their money's worth.

On the other hand, if key players are involved in the process up-front, they will be more likely to embrace the change. To help facilitate involvement from the group, form a cross evaluation team that includes at least one representative from each of the key departments. This will ensure decisions are carefully weighed and measured, taking each perspective into account while building consensus among the group.

Part of the cross evaluation team's charge should be to develop a communication strategy designed to help everyone clearly understand the changes that are taking place. The communication should explain the big picture while helping each individual understand how changes will impact their daily lives.

4. Create a Culture of Continuous Improvement

Now that the planning process is in place, the WFM team has been established and everyone has embraced the change, what's next? Staying on top of the contact center's objectives can be just as challenging, if not more challenging, than establishing them in the first place. So it's important to foster a culture of continuous improvement.

That means continually tracking and identifying business trends and making the appropriate adjustments to the daily plan. In conjunction with changes to the planning process, work with groups such as human resources to enhance goals, staffing and training. Also, continue working with the WFM vendor to identify training opportunities. There may be features and functionality that the center can take better advantage of once the WFM team has mastered the basics or knowledge that might get lost when turnover occurs. And keep networking. User groups, conferences and industry organizations hold a plethora of new ideas.

Constantly revisit the organization's processes and procedures to be sure the operation is functioning as efficiently and effectively as possible. If someone asks, "Why are you doing it that way?" and the response is, "Because that's the way we've always done it," a process re-evaluation is long overdue.

Workforce management is not an easy button, but it's a whole lot easier to get the desired results if the center has laid the groundwork for success even before a system is in place.



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www.cirriusimpact.com • info@cirriusimpact.com • 1.866.411.0123

