



Technology Focus with Daryl Gonos

Beyond Forecasting and Scheduling: Five Features that Justify a WFM Investment

WFM technology offers more than simple forecasting and scheduling tools. Here's how to get the best ROI.

For many years, workforce management (WFM) has been referred to as forecasting and scheduling software. Because vendors tend to heavily promote the forecasting and scheduling features of their WFM products, managers often perceive that that's all the products have to offer. Many managers have commented that, since their call center has limited hours of operation, their call volumes are flat and agents work fixed shifts, no real benefit can be derived from an investment in "forecasting and scheduling" technology.

While there is no question that the ability to create more accurate forecasts and optimize agent schedules positively impacts service levels, the daily practice of WFM encompasses much more. Workforce management is a day-to-day tactical philosophy and business approach that uses technology to drive effective customer service delivery and efficient resource utilization. It's a necessity, even in fixed-schedule environments with flat call volumes.

Forecasting and scheduling tools aside, there are a plethora of features that will justify a WFM investment. Let's look at five specific features.

Data Integration

In a non-automated workforce management environment, there is usually a host of individuals managing data using time-consuming, error-prone Excel spreadsheets (see box). The information, administrative and management effort required by call center analysts, managers and supervisors is immense. Workforce management software represents a significant opportunity to auto-

mate and centralize the data collection processes associated with:

- Company information
- Agent information
- Forecasting data
- Scheduling and shift information
- Agent performance
- Agent adherence
- Time keeping
- Vacation administration
- Reporting
- Center performance

Evaluating the efforts associated with manually managing this data can help you to build a highly compelling case. Saving two FTEs by consolidating the effort will generally justify an investment in WFM technology.

'What-if' Analysis

Workforce management offers multifaceted "what-if" analysis tools that allow managers to quickly and intelligently make decisions about service lev-

els, staff recruiting and schedule efficiencies that are essentially unavailable in manual environments.

Automated WFM solutions allow managers to determine how many people they need on the phones in order to offer a designated grade of service. By associating an average hourly wage to those requirements, it's easy to measure the cost of offering different grades of service or the cost of adding workload into the call center. These scenarios can be generated in seconds compared to manually calculating the results, which takes hours or even days.

What-if analysis, though, goes even further. Call center attrition and growth must be managed intelligently. Automated WFM systems enable managers to plan for these events and bring new resources into the call center with the shift type that makes the most sense for service level and the needs of the business. The solutions enable the users to measure the efficiency and impact of different shift configurations on call arrival patterns.

This information can be presented to the human resource department which, coincidentally, is typically doing its own manual calculations to determine how many and what shifts to offer new recruits. The ROI point is that WFM solutions have interdepartmental benefits for the entire organization.

Payroll departments can also benefit. Modern WFM technology tracks and manages each agent's time. Time may be tracked in terms of productive and non-productive time, and paid or unpaid for such things as: tardiness, sick days, jury duty leave, vacation, meetings and training. This information, when used for payroll or reconciled against other payroll systems, can be extremely valuable.

Intraday Management

Intraday management is where WFM

A Word about Manual WFM Environments

Manual WFM call center environments tend to fall into two categories – limited-shift environments or those in which agents can determine their own shifts based on their personal needs.

In limited-shift environments, agents typically work eight-hour shifts, with a few part-time shifts. Those environments in which the agents generally drive the schedules are usually growth companies with tenured employees. Manual WFM call centers lack the tools to effectively and continually improve operational efficiency — presenting credible solutions requires weeks of number-crunching.

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solutions really shine. These decision support mechanisms allow call centers to flex and respond to the dynamics of their customers while maintaining consistent service levels – in spite of unplanned events that would dramatically disrupt manual environments.

Intraday reports indicate forecast accuracy up to the latest 15- or 30-minute increments by reconciling the forecasted to actual call volume. If the actual volume is not as high as forecasted, the tools allow managers to reforecast the volume given the current day trend. They can then reallocate breaks, lunches, meetings or other off-phone assignments to maintain service level integrity.

A manual environment simply cannot intelligently and quickly respond in such a fashion; it chases its workload with the plans but never really catches it. And in most cases, manual environments do not optimize the placement of off-phone events beyond a casual guess and, thus, operate below the efficiency of automated call centers. Unplanned circumstances and a lack of tools and information compound the inefficiencies.

Real-Time Adherence

Modern phone systems indicate the work state that agents are in at any given moment. This is valuable information. If

“The WFM/Call Center Relationship Special Issue” and survey results will be available later this month to WFM Professional Interest Area members. For more information, check the WFM Web resources page at www.icmimembers.com or look for your email notification.

you add a WFM solution to the equation you can see what agents are doing as well as what they're *supposed* to be doing. That is *really* valuable information.

Real-time agent information allows managers to identify their consistent top performers and to coach and council those who degrade service level with unscheduled, unproductive time. This information is critical if you consider how much of your agents' time is actually spent on the phone. A typical eight-hour shift equals approximately 5.6 hours of phone time once you subtract time for breaks, lunches, meetings etc. As an example, 15 minutes of unproductive time per agent per day in a 100-seat call center with an average hourly wage of \$20 equals \$500 per day in unproductive payroll expense. For a call center that operates Monday-through-Friday, that will cost \$10,000 a month in unproductive payroll expenses – or \$120,000 annually. That's more than enough to justify an investment in WFM technology.

Web Access

Workforce management tools have evolved with the Web – nearly all pro-

vide access to schedule information via a Web browser. That allows call center staff to access their schedules from home. Because most people already know how to use a browser, it requires little or no training for agents. Many systems enable agents to request exceptions, trade and swap shifts, and even complete schedule bidding via the Web. How much of your supervisors' time would be saved if the manual schedule assignment and bidding process were eliminated? What if you could cut scheduling calls to supervisors and support staff in half?

The payoff in increased staff morale alone makes this feature in a WFM application worthwhile. Agents really appreciate the ability to get scheduling information in an easy and timely fashion. It makes call center staff happier than any algorithm or “optimization” feature.

Expand WFM Perceptions

Forecasting and scheduling is certainly a critical part of the WFM process. But it is after the forecast has been generated and the shifts optimized that the real power of the WFM system comes into play.

So the next time someone in your organization refers to workforce management as “forecasting and scheduling” take the opportunity to expand their perceptions. Workforce management technology is tremendously rich and – even without forecasting and scheduling algorithms – it's worth the investment. CCMReview

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