



## ***Workforce Management The Basics and Beyond***

A workshop designed to improve the skills of those responsible for workforce management in the call center.

### **Optimize performance through more effective workforce management practices!**

As call centers become more complex, the importance of “having the right staff and supporting resources in the right places at the right times” becomes ever more crucial to success. In this seminar, you’ll learn how to build on basic concepts to create a planning culture that drives consistently improved performance. The Basics and Beyond seminar uses a hands-on workshop approach that brings principles to life, encourages participation and generates results.

#### You'll learn the most effective ways to:

- ∞ Improve the quality of historical data
- ∞ Use advanced tools to build better forecasts and schedules
- ∞ Integrate staffing needs for other channels into schedules
- ∞ Develop a tiered staffing approach that improves efficiency and morale
- ∞ Create a plan to “react in advance”
- ∞ Account for the impact of advanced routing schemes
- ∞ Prepare for the future with long-term models

#### You'll increase your value to the organization by:

- ∞ Increasing forecast accuracy
- ∞ Preparing more effectively for long-term planning and budgeting
- ∞ Reducing the chaos in your center
- ∞ Improving the consistency of operational results
- ∞ Generating higher levels of employee and customer satisfaction

**Did you know? Increasing the accuracy of your forecasts and schedules can save you tens of thousands of dollars, month after month!**

### **Who should attend?**

This innovative seminar was developed to meet the unique needs of those responsible for workforce planning and management in the call center. Approximately 25 percent of the time devoted to each topic covers the basics, with the balance spent on intermediate and advanced principles and applications. Those new to workforce management will get a primer on the basics and a crash



course in more advanced principles. Seasoned practitioners will get a refresher on foundational concepts before moving their skills to the next level.

### **Seminar Materials**

A comprehensive course manual  
Glossary of call center terms  
Article reprints and studies  
A certificate of completion

### **Two-Day Program Outline:**

#### Cleaning the Data

##### Basic Layer

- ∞ Proper phone mode usage
- ∞ Accounting for special events

##### Advanced Layer

- ∞ Indexing past volumes
- ∞ Segmenting call volume
- ∞ Defining AHT variances

#### Forecasting

##### Basic Layer

- ∞ Historical and event-driven forecasting
- ∞ Using spreadsheet and WFM systems

##### Advanced Layer

- ∞ Driver-based forecasting
- ∞ Commercial forecasting systems
- ∞ Cross-over interval forecasting

#### Staffing

##### Basic Layer

- ∞ Erlang C
- ∞ Service level vs. occupancy

##### Advanced Layer

- ∞ Computer simulation
- ∞ Staffing models

#### Scheduling

##### Basic Layer

- ∞ Shift bids
- ∞ Vacation scheduling
- ∞ Managing peaks



#### Advanced Layer

- ∞ Tiered scheduling
- ∞ Multichannel scheduling

#### Real-Time Management

##### Basic Layer

- ∞ Key metrics
- ∞ Intraday adjustments

##### Advanced Layer

- ∞ Reacting in advance
- ∞ Forecasting expected queue lengths

#### Measuring and Reporting

##### Basic Layer

- ∞ Accuracy measurements by interval
- ∞ Identifying causes of substandard results

##### Advanced Layer

- ∞ Illustrative graphics
- ∞ Adherence