

Do-It-Yourself Workforce Management: For Small Contact Centers Without the Fancy Software



"The variety and content of the ICMI seminars are invaluable to taking your call center to the next level."

Reye Kenney
Telecommunications Director,
Hagerty Insurance

COURSE PRICE

Virtual Classroom Course \$299

Live, virtual two hour course.

On-Demand \$299

Access course recording for 30 days.

REGISTER: icmi.com/training

WHO SHOULD ATTEND?

- Managers
- Supervisors of Small Call Centers

Stop guessing and estimating staff and schedule needs with the tools and skills to forecast accurately without workforce management software.

Through ICMI's Do-It-Yourself Workforce Management course, you'll gain the skills and tools you need to implement stronger forecasts, staffing and scheduling for a more efficient, productive contact center.

You'll start with examining the key elements of the WFM process, including forecasting, staffing, scheduling, real-time management and reporting. Applying these key elements, you'll develop three critical levels of planning – long term, mid-term and day-to-day.

You'll work through the types and methods of basic forecasting. More than just plugging in numbers, you'll learn the six forecasting "musts" that are the most important part of the process. You'll also learn formulas to measure your forecasting accuracy for even more success at workforce planning.

Moving on to staffing, you'll master the two critical staffing models you need to achieve the service level you set. You'll practice and master the Erlang C formula to proactively staff at the interval level. Once you have the components to calculate staffing, you'll learn how to create a simple Excel-based schedule that has all the functionality of WFM software.

Designed for managers and supervisors at small contact centers (less than 60 agents) who are responsible for workforce management and who want to:

- ▶ Learn the essential elements of workforce management without using WFM software.
- ▶ Use Erlang for staffing to the interval level more efficiently.
- ▶ Schedule more effectively.
- ▶ Proactively plan off-phone activities.
- ▶ Create valuable analysis and reporting.
- ▶ Acquire the spreadsheets and calculators to manage the workforce without expensive WFM software.

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COURSE OUTLINE

Stages of workforce management (WFM)

- ▶ Four typical stages of WFM

Trade-offs of doing it yourself

The workforce management process

- ▶ Three levels of planning
- ▶ Forecasting
- ▶ Staffing
- ▶ Scheduling
- ▶ Daily planning-RTM/exceptions
- ▶ Reporting

Hiring and training your Workforce Manager

- ▶ Establish tools, training and texts that are needed

WFM Accountabilities

- ▶ Forecasting
- ▶ Schedule Delivery
- ▶ Scheduled to Requirements
- ▶ Report Delivery

About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals – from frontline agents to executives – who wish to improve customer experiences and increase efficiencies at every level of the contact center. ICMI's experienced and dedicated team of industry insiders, analysts, and consultants are committed to providing uncompromised objectivity and results-oriented vision through the organization's respected lineup of professional services including training, consulting, events, and information resources.