Module 6 – Forecasting and Staffing for Non-Phone Contact Channels

6.1 Calculating Base Staff for Response Time Contacts

Key Points

- **Calculating staff to handle email and other response time contacts is generally based on a units-of-output approach.**
- **Since response time contacts do not have to be handled immediately, there are many ways to distribute the workload into staff schedules.**
- **An efficiency factor ensures that enough agents are scheduled to prevent them from burnout, the result of handling one transaction after another for extended periods.**

Explanation

Calculating staff requirements for a workload that does not have to be handled at the time it arrives is generally based on the centuries-old units-of-output approach. For example, if 60 email messages are received that have an average handling time of four minutes, that's four hours of work. One agent working non-stop could handle the load in four hours. If the transactions need to be completed within two hours, a minimum of two agents working over a period of two hours will be needed. So, as with service level and inbound calls, the email workload and response time objective dictate staff requirements. Accordingly, the basic formula for calculating the minimum staff required is:

Basic Formula

$$\frac{\text{Volume}}{(\text{RT} \div \text{AHT})} = \text{Agents}$$

Volume = Volume for forecast increment (e.g., volume per hour)
RT = Response time
AHT = Average handling time

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Volume is the quantity of transactions that must be handled, AHT is the average amount of time it takes agents to handle them (the equivalent of average talk time and average after-call work for inbound telephone calls), and response time is the time available to respond to customers after receiving their messages.

Using the formula, the 60 messages previously mentioned could be handled in two hours with 60 ÷ (120 ÷ 4) = 2 agents.

There are several things to keep in mind:

- There are many ways base staff schedules can be divided to achieve the objectives. In fact, in the example, 60 agents could rush in and handle all 60 transactions just before the promised response time and still meet the objective. The goal is to find an efficient way to distribute the workload across the schedules within the promised response time.

- The basic response time formula assumes a "static" amount of work to be completed – in other words, that the work has already arrived and is waiting to be processed. However, email and other contacts that can be deferred arrive throughout the day in patterns that are often similar to phone traffic. With 24-hour response time objectives, projected workload can simply be built into the following day's staffing requirements. But for more aggressive response time objectives, both on-hand workload and projections by interval will need to be considered to determine staffing requirements.

- When response time objectives are less than an hour, traffic engineers generally recommend using Erlang C or computer simulation to calculate base staff. This would be a queuing and service level scenario, like inbound telephone calls.

- Breaks, absenteeism and other activities that keep agents from the work must be added to base staff calculations.

- An efficiency factor acknowledges that agents cannot handle one transaction after another with no "breathing" time in between. For example, for an efficiency factor with a ceiling of 90 percent, divide base staff calculations by .9 to calculate if additional agents are required.

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Email-Handling Strategies

Contact centers with successful records of handling customer email have developed a variety of tactics for dealing with the uncertainties they face. Following are a few recommendations.

- **Build a historical record.** Tracking email volume, subject matter and handling times eventually builds a database that can be used to improve forecasting.
- **Incorporate additional factors into the forecasting model.** In addition to historical data, companies are using other information to forecast email – for example, sales projections, plans for special marketing efforts and planned changes to the website.
- **Set standards for responding to email.** There is no one "right" standard. Mitch Johnson, president and CEO of Email Solutions, an outsourcing company, says his clients require response times "anywhere from 24 hours down to immediate, depending on the application." Some companies set different standards for different types of customers (e.g., email from business customers may get faster turnaround time) or for different types of requests (e.g., a brochure promised during a phone call may be emailed immediately so the customer won't call back and repeat the request).
- **Use the forecasts and the response standards to staff the email center.** Contact centers with service level objectives need models such as Erlang C to estimate the number of agents they need at any time. With a response time objective, the calculation is simpler.

  While some contact centers use "universal agents," others find that combining the service-level-driven telephone group with the response-time-driven email group results in email being neglected. After trying the universal agent approach, Aaron Hunt, customer service manager for Xerox's Small Office/Home Office group (also known as Team Xerox), eventually took the agents with good writing skills and formed a dedicated email group.
- **Develop a backup plan.** Given the uncertainty about email volume and content, a backup plan is crucial. One tactic is to aim for a response time better than what you're promising the customer. Then customers will be delighted if your forecasts are correct, and if your forecasts are off they won't be unhappy.

  Keeping a pool of trained agents in reserve is also useful. Contact center managers in large companies sometimes "borrow" agents from the phone queue or from another contact center in the same company. Outsourcers servicing multiple companies regularly cross-train staff so they can assign them to different clients based on volume. Smaller companies handling their own email may contract with outsourcers to cover unexpected peaks. If all else fails, supervisors and managers may find themselves answering customer email.
- **Monitor the email queue as closely as you monitor the telephone queue.** Supervisors and managers need to watch the email queue to make sure the backlog doesn't threaten the response time target. (Email response management software generally allows real-time queue monitoring.)

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6.2 Email Response Management Systems

Key Points

- **Email response management systems (ERMS) perform many of the same routing and reporting functions for email that ACDs perform for inbound calls.**
- **Because the entire context of the communication is included in the message, an ERMS can help process the message and craft the response with varying levels of agent input.**
- **An ERMS adds a significant amount of control over the management of email and the resources used to handle it.**
- **Centers handling multiple contact channels in the same queue can integrate the ERMS with the larger interaction management system.**

Explanation

Email response management systems (ERMS) control the flow and tracking of email into an organization in much the same way that an ACD controls the flow and tracking of inbound calls. An ERMS can perform the following routing and reporting functions:

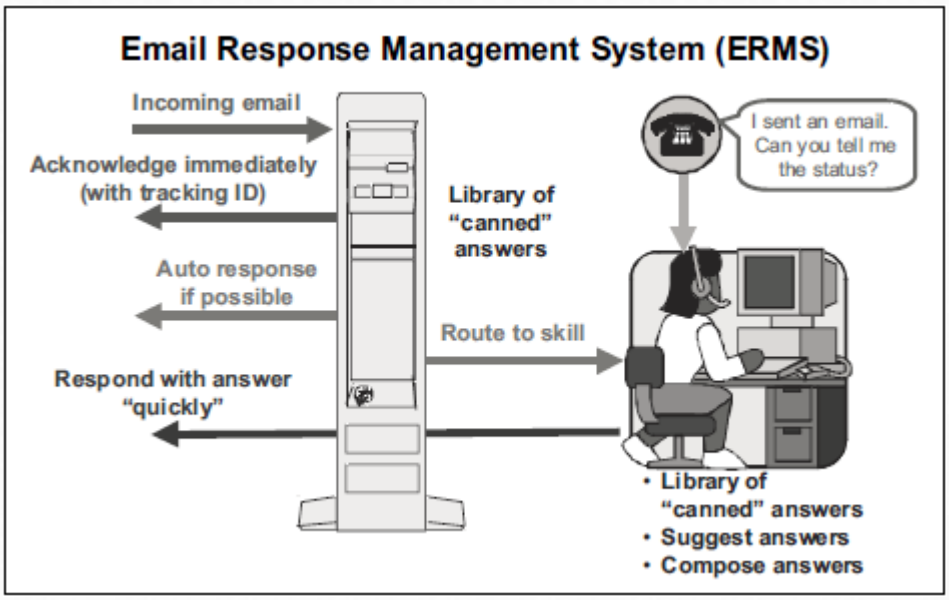
- Conditional routing based on skills, customer priority, etc.
- Priority queuing
- Response time tracking
- Management reporting

However, an ERMS can go much further than an ACD in that it can "read" the subject and/or text of the message and then perform further steps based on business rules. The types of functionality provided by this artificial intelligence include:

- **Advanced auto acknowledgment:** An automatic response is sent to the sender indicating that the email has been received, along with the timeframe in which to expect a response.
- **Recommended response:** Incoming email messages are interpreted by the system to determine content and an agent is provided with a recommended response.

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- **Automated response:** Inbound email messages are interpreted by the system to determine content and an automatic response is sent to the customer. (Note: Accuracy rates should be tracked to monitor the effectiveness of using automated response.)



Primary Benefits

The ERMS offers a contact center four main benefits:

- Control over email (routing and content)
- Reduction in the staff required to handle it
- Tracking of response times
- Ability to coordinate customer interactions when the customer is using both voice and email to communicate with the organization

The relative value of these benefits is typically dependent on the volume of email received in the center and the emphasis placed on quality and service to the customer.

For example, where email volume is large, the potential reduction in staff size is often the driver of the ROI calculation and the main benefit of the system. Where quality is of primary importance and errors can cause significant expenses, the ability of an ERMS to encourage/provide consistent and accurate responses is often cited as the key benefit. In organizations in which quick response is crucial and the potential value of each contact is high, the ability of an ERMS to queue, track and report on email is the compelling force behind the purchase. Often, in these environments, the contact center will integrate the ERMS with a multichannel queue capability (supplied by an ERMS or ACD vendor) to exercise management control over the broad spectrum of communication channels. Alternately, ERMS functionality for universal queuing may reside within a larger interaction management system.

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Implementation

To achieve full functionality, an ERMS must integrate with a number of different systems, including:

- The ACD
- The workforce management system
- Email servers
- CRM systems
- Systems with customer contact history

The risk associated with the integration and implementation of these systems is often dependent on how aggressively some of the features are used. For instance, companies that pursue high percentages of end-to-end automation on free-form text email messages (rather than Web form-generated emails) run the risk of inaccurate and incomplete responses if the system is not programmed correctly.

ERMS have proven to be very effective when combined with Web forms. Using this combination, a company can ensure that a form is filled out correctly via the Web with all of the information required by the ERMS or any back-end fulfillment system. The message is then routed to the ERMS, where a standard response is sent out. If applicable, the message will then also be delivered to any other system for completion of the transaction without agent intervention.

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6.3 Calculating Base Staff for Outbound Calls

Key Points

- **A general outline of the steps involved in determining required base staff for outbound calls includes:**
  - **Step 1: Identify the strategic objective**
  - **Step 2: Gather historical data**
  - **Step 3: Determine the size of the list of numbers to dial**
  - **Step 4: Determine time of day effectiveness**
  - **Step 5: Determine average handling time (AHT) by type of contact**
  - **Step 6: Combine data to determine base staff required**
- **When calculating base staff for outbound contacts there are several important considerations:**
  - **Dialer pacing**
  - **List quality**
  - **Feedback loop to the strategy team**

Explanation

Outbound calls to customers can be scheduled based on factors such as convenience to customers, time of day effectiveness, etc. Within these blocks of time, outbound contacts can be generated and handled one after another. Base-staff requirements can be calculated using traditional response time calculations; for example, a minimum of ten agents would be required to handle 40 hours' worth of calls in four hours' time.

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- Step 1: Identify the strategic objective
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- Step 4: Determine time of day effectiveness
- Step 5: Determine average handling time (AHT) by type of contact
- Step 6: Combine data to determine base staff required

Step 1: Identify the strategic objective

The first step in staffing for outbound contacts is to identify the strategic objective of the campaign. For example, the strategic objective could be to increase sales by x%, produce a specific amount of revenue through collections calls, complete a certain number of customer surveys, or reduce customer churn by y%. The team involved in determining the strategic objective should provide the contact center with guidelines for scripting, including the approach to be used (e.g., sales enticement, collections urgency) and the call to action (i.e., how the agent should end the call). Contact center managers also must be aware of any legal or regulatory issues that apply to the campaign.

Step 2: Gather historical data

The next step is to gather the historical data that will be needed for steps three, four and five. The effectiveness of the list, the right time of day and average handling time can all be influenced by many factors, including campaign type, time of day, day of week, and customer type. For example, new customers being called as part of a welcome message are more likely to answer than more established customers being called as part of a retention campaign.

One important motivation to maintaining accurate historical data relates to real-time management. You will more quickly be able to determine if the list you are calling will be effective if you know what is typical to expect during this type of campaign. Being able to adjust staffing requirements and knowing when to retire a list have cost performance implications. The ability to adjust early in a campaign will save money and better enable the center to meet the strategic objective of the campaign.

Step 3: Determine the size of the list of numbers to dial

To determine the size of the list of numbers you need to dial in order to meet your strategic objective, you must begin with the number of converted right party contacts (CRPC) that will result in a successful campaign. Then, determine how many right party contacts (RPC) will result in the required number of CRPC. Historical data will help you determine the number of contacts you will need (these

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include wrong party contacts, right party contacts and voicemail) and then the number of connects that will result in the required number of contacts (connects also include busy signals).

If the strategy team tries to reverse this process by giving you the list first and telling you to achieve the strategic objective by calling that list, you must communicate to them what is possible to return on that list. List size and list quality are paramount to determining what you can achieve, so identify the strategic objective, determine the size requirements of the list and then gather the lists that are likely to produce the desired results.

For example, if the revenue target requires 300 right party contacts and there has historically been a 30% RPC rate, then 1000 total contacts with customers will need to be made. If the contact rate is 45%, then the dialer would need to connect 2,222 calls in order to achieve the desired revenue target. For staffing purposes, workforce managers will need to consider the total contacts (1000 in this example), not the total number of connects.

Step 4: Determine time of day effectiveness

Use historical data to determine the time of day when you are most likely to achieve the strategic objective. Blended centers can combine this data with incoming call volume data to determine how best to staff their centers. When considering right time of day factors for blended centers, there must be a clear priority of either inbound or outbound calls. If the priority is inbound calls, then time of day effectiveness will be less critical. If the priority is outbound contacts, then the center may choose to sacrifice service level on inbound contacts in order to achieve the desired number of converted right party contacts for the outbound campaign.

Step 5: Determine average handling time (AHT) by type of contact

Once the list size has been determined and the time of day effectiveness established, average handling time for each type of contact should be determined. AHT must be determined for each contact type: wrong party contact (WPC), right party contact (RPC) and converted RPC (CRPC). The AHT of each type of contact can vary widely so it is important to represent AHT accurately.

In order to determine the overall AHT that will be required for staffing, you can weight AHT calculations based on the % of overall contacts or you can use a combined service time (CST), which converts the handling times and number of contacts into one number representing the total time to handle all contacts.

Step 6: Combine data to determine base staff required

To determine workload for staffing purposes, multiply the number of contacts by the weighted AHT, or use a combined service time (CST). Then, the hours of workload can be converted into full-time equivalents (FTEs), the time of day effectiveness considered and the process of scheduling agents can begin.

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The outbound workload has more flexibility with regard to scheduling since the center has control over when calls are offered to customers. However, time of day effectiveness has a significant influence over the ability to achieve the strategic objective. Any decision to schedule outside of the most effective time of day will impact the ability to achieve the strategic objective and should be reported to the strategy team.

Considerations

There are several considerations when determining base staff for outbound contacts. These include:

- **Dialer pacing:** The type of dialer being used (i.e., predictive, progressive or preview) has implications for staffing. These implications will be discussed in the section on dialers.
- **List quality:** List management has an impact on staffing. Typically once 70% of a list has had some type of contact, the list should be retired as a general rule. This is due to the law of diminishing returns.
- **Feedback loop to the strategy team:** An essential component to forecasting and staffing well for outbound contacts is a feedback loop to the strategy team. Future campaigns will be more effective if the strategy team is aware of the performance of past campaigns.

Capacity Planning for Outbound Centers

When planning for an inbound call center, it is important to first understand historical trends in order to forecast inbound calls and to determine the volume of calls per interval, per day, per week, per month and per year. This kind of planning is chiefly based on historical volumes and assumptions for the next year's increases. While this is not an exhaustive explanation of the process for inbound capacity planning, it is a high-level view of the approach.

With outbound call centers, it is an entirely different process. Outbound call centers are strongly linked to their strategic intent and the strategy department. A team discussion between Operations and Strategy needs to take place in order to determine the number of calls required from the outbound call center. For example:

In a Loyalty and Retention call center that is tasked with lowering churn rates, it is important for each stakeholder – Operations and Strategy – to come together to determine what it will take to achieve their shared goals.

- "Lowering churn by x% will require y# of converted right party contacts (CRPCs)" is a calculation that Strategy will make based on both historical information and assumptions as to what "treatments" or "offers" Strategy will provide to the call center.

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- Operations will need to provide information in regards to how many connects, contacts and RPCs will be required to provide the number of successful RPCs.

- These numbers combined will then provide the top-level number of required contacts. From here, average handle time is then applied to the number of required contacts and RPCs, much like in inbound call centers. This will give the number of full time equivalent (FTE) hours required to achieve the targets.

The process in a collections or sales center that is tasked with achieving revenue targets is very similar to that of Loyalty and Retention centers. Strategy and Operations need to work together during the annual planning session to determine both required revenue targets and successful RPC rates to achieve those targets. However, there are a few differences:

- Collections or Sales centers need to add the average collection revenue or sales revenue to understand the worth of each contact.

- This additional information will provide the number of converted or successful RPCs required to achieve the revenue targets.

The relationship between planning and strategic intents means that Operations requires a greater seat at the table during the planning process in the outbound call center. In some ways, this greater relevancy will help Operations to drive strategy through a feedback loop of what scripts, offerings and plans are working to convert RPCs and which are not.

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6.4 Dialers

Key Points

- **Dialers are technologies (hardware/software) for automating the process of making outbound calls to lists of people.**
- **In addition to placing outbound calls, dialers may provide list management, track the disposition of calls and provide detailed real-time and historical reporting.**
- **Dialers can operate in several modes, including preview dialing, progressive dialing and predictive dialing.**
- **Dialers aid in call blending by either monitoring inbound traffic and allocating inbound agents to outbound calls when inbound volume is low, or by allocating outbound agents to assist with inbound calls when service level is suffering.**
- **Dialers do not always connect the called party to an agent. Dialers can also play a pre-recorded message, which is called virtual agent or voice broadcasting.**

Explanation

One way to understand the advantages of using a dialer is to consider it as an ACD for outbound calls. Dialers launch calls and deliver them to agents, just as an ACD does. Dialers also provide tracking, real-time monitoring and reporting capabilities for outbound calls similar to those that ACDs provide for incoming calls. Just as ACDs help manage the routing of incoming calls, dialers help organizations with list management.

While some experts claim that predictive dialing can double the number of customers an agent will speak to per hour, they offer a trade-off. The more aggressive they are programmed to place calls (and increase “productivity”), the more likely that people will hear silence when they answer the phone, causing more people to hang up.

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Programming should be done with the objective of increasing completed calls. Before purchasing a dialer, conduct manual campaigns to determine your needs.

Dialing Modes

Dialing modes include:

- **Preview dialing**: A setting within the dialer that instructs the dialer to dial a specific phone number under control of an agent. The agent previews a screen containing information about the person to be called, monitors the call for connection (or other classification), and updates the database accordingly. This mode is used for callbacks or other contacts in which the agent needs to review information before placing the call. The agent chooses which numbers to call and the entire call is within the agent's control. This can also be referred to as power dialing. This dialing mode boosts productivity in a center that previously managed outbound calls manually, but is the least efficient of the three modes listed here.

- **Progressive dialing**: Progressive dialing is very similar to preview dialing. It gives an agent the opportunity to review the account. With progressive dialing, the agent is presented information on a new account during which time the dialer dials the number(s) associated with that account. In progressive dialing the dialer will wait to dial until the agent has completed their previous call. The agent does not control which number(s) to call and in which order, and reviews the account while waiting for the dialer to connect them to the call. If there is no answer, then the dialer will present the next record to the agent and dial the number(s) associated with that account.

- **Predictive dialing**: An application that instructs the dialer to dial multiple simultaneous calls based upon a preloaded list of phone numbers. A mathematical algorithm is used to predict the correct number of calls to launch based on when the next available agent(s) should become available. Then it seeks to match the number of live connected calls with the number of available agents. The system determines when a called party has answered and transfers only live calls (and answering machines, if desired) to agents. Agents also receive a data screen about the call. The system classifies all calls launched (e.g., contact, busy, no answer, answering machine, network tones) and updates the database accordingly.

For predictive dialing to pace properly, a minimum of eight agents is needed on the dialer at one time. Any less than that will result in either higher abandonment rates or higher agent idle times as the dialer struggles to predict when an agent will be available for the next call.

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Call-Blending Considerations

Call blending is the ability to dynamically allocate contact center agents to both inbound and outbound calling based on conditions in the contact center and programmed parameters. This enables a single agent to handle both inbound and outbound calls, from the same position, without manually monitoring call activity and reassigning the position. The outbound dialing application monitors inbound calling activity and assigns outbound agents to outbound calling when the inbound volume drops off, or will hold inbound calls until an agent is available if the strategic priority is to place outbound calls. Any of the above dialer modes can be used in a blended setting.

When agents are on an outbound call, they are no longer available for the next randomly arriving inbound call. The mathematical laws of probability hold that more agents will therefore need to be scheduled to handle the same workload of incoming calls, if the same agents will be making outbound calls. But the problem presented for the contact center manager is "How many more?" Scheduling agents becomes significantly more complex in a call-blending environment. Workforce management systems are only just beginning to address this problem. However, there are cases where call blending works well – most notably in collection departments where customers are being called and returning calls. In this setting, a blended environment is often successful.

Virtual Agent

Dialers do not always connect the called party to an agent. Dialers can also play a pre-recorded message, which is called virtual agent or voice broadcasting. Some virtual agent messages ask the person who answers to press a button on their phone keypad, such as in opinion polls in which recipients are asked to press one digit if they support one side of an issue, or another digit if they support the other side. Speech recognition in IVR applications can also be employed. This type of call is often called outbound interactive voice response (IVR).

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6.5 Web Communication Channels

Key Points

- **The Web offers enormous self-service opportunities, but they rarely succeed without the availability of assisted services.**
- **There is a large number of channel options associated with the Web, including:**
  - **Email**
  - **Web chat**
  - **Web callback**
  - **Web call through**
  - **Web collaboration**
  - **Contact center initiated assistance**
- **All channels have at least one drawback, and it is important to understand the drawbacks when choosing and deploying channels.**
- **Technologies that help manage the complexity created by the proliferation of channels are becoming available.**

Explanation

The Web has opened new ways for organizations to communicate with customers, suppliers, vendors and other stakeholders. Many organizations have recognized that if Web content is accurate, stored appropriately and simple to access, customers can use the Web as a self-service tool. To capitalize on this, many websites now offer an enhanced FAQ section that is powered by a natural language input tool. Some organizations also offer customer access to parts of their internal Knowledgebase Systems. However, while these self-service tools have some success with simple requests, they do not eliminate the need for assisted service – and in many ways, they can increase demand for agent support.

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Contact Alternatives

In order to respond to the need for personalized assistance through the Web, new tools have emerged to make the connection easier and more convenient. The various communication channels and possibilities associated with the Web include:

- **Email**: Post email addresses (or Web forms that are mapped to the organization's email addresses) in multiple places on the website where customers would most likely have the need to contact the organization.
- **Web chat**: This allows customers to have a private, real-time, text-based dialogue with a company representative over their Internet connection, without the need for a separate phone line.
- **Web callback**: By clicking on a button, the customer lets the company know that he/she wants to be called back either immediately or at a designated time.
- **Web call through**: Using voice over Internet (VoIP) technology, the customer clicks on a button that establishes a voice line directly to the contact center.
- **Web collaboration**: Used in conjunction with any of the above channels (or with a traditional voice call), Web collaboration is a broad term referring to the ability for an agent and customer to share content by pushing/pulling Web pages and demonstrating how to use certain applications.
- **Contact center initiated assistance**: This is a text-chat session initiated by the agent, rather than the customer.

New Challenges

Considering the many choices, it can be difficult for an organization to determine exactly what to provide, and from which vendor to get it. Many Web integration failures are caused by the lack of a clear customer access strategy. Others are caused by a lack of understanding of the challenges, which are outlined as follows:

- **Email**: The challenges of handling email are typically problems with routing or content management. Many contact centers begin to handle email before obtaining an email response management system. If email volumes grow quickly, the contact center may not have the tools to meet customer response expectations. Another routing challenge is how to handle emails with multiple questions that require responses by different people. Content challenges include frequent misunderstandings between customer and agent and legal or regulatory concerns about the permanence of email records. In some cases, email

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responses that are not "cut and paste" must be reviewed by a supervisor or possibly the legal department.

Typically, email interactions are managed using a response time objective with several hours to the next business day frequently being the response time threshold. However, if customers are expecting an almost immediate response, a service level objective will be required and staffing will need to be determined using Erlang C.

- **Web chat**: This channel requires staffing to meet service level objectives. However, agents can sometimes handle more than one chat session simultaneously, so staffing must consider simultaneous sessions as well as average handling time. As with email, some companies are concerned about the permanence of web chat sessions.
- **Web callback**: Most customers are looking for an immediate callback, which requires proper service level staffing. Those who don't want or receive immediate service may be hard to reach.
- **Web call through**: VoIP calls have become commonplace as issues with Internet connection speed have diminished. Depending on the customer base, some customers could have quality issues if their broadband connection is not fast enough or has heavy traffic.
- **Web collaboration**: Most Web collaboration requires the customer to download an applet that allows the organization to access the customer's computer with the customer's permission. This requirement may be a roadblock to some customers. As technology in this area improves and customers can simply give permission to agents to access their computers, without the added and time consuming step of downloading an applet, Web collaboration may become more common. Also, transaction handling times are typically high, which can create staffing problems for the contact center.
- **Contact center initiated assistance**: One of the strengths of the Web is the perception of freedom it allows. Any attempts to "reach out" to users without their permission may well create ill will among customers and create privacy concerns.

Despite these drawbacks, these channels continue to increase in popularity. Their presence provides customers with options, those options increase interaction, and the increased interaction often improves customer satisfaction and revenue.

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Related Technologies

In order to optimize the operation of the contact center with multiple channels, related technologies are emerging:

- **Multichannel queue**: All channels are fed into the same queue and are subject to processing based on business rules. This allows "one view" of incoming transactions, and provides automation to make moment-to-moment decisions on prioritization.
- **Unified reporting**: Data from different channels and systems are included on one reporting tool. This supports better analysis and decision-making in the organization.
- **Customer contact history databases**: Records of all transactions available across the organization.

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6.6 Staffing for Web Chat

Key Points

- **Web chat is a service-level-oriented contact, and the essential planning steps apply. However, because one agent can typically respond to more than one customer chat at a time, applying Erlang C will overstaff for this contact channel.**
- **Key decisions when choosing the right staffing model for your center include:**
  - **When to use a formal staffing approach**
  - **How many simultaneous sessions per agent to allow**
  - **When to send the customer's request to an agent**
  - **When a session ends**

Explanation

Web chat is a service-level-oriented contact, and the essential planning steps apply. The most conservative (highest) estimate of agents can be determined by assuming that each agent can interact with only one customer at a time, then using Erlang C or simulation to calculate staff requirements based on the usual input — number of contacts, average session transaction time (the equivalent of AHT), and your service level objective. However, this will overestimate actual requirements in many cases; between workflow-routing options and technology possibilities, there really is no "one-size-fits-all" approach. Good service will depend on a few decisions, such as the number of customers an agent can handle at once.

Web Chat Definitions

The following are definitions that need to be understood:

- **Session:** The whole of the interaction, from hello to goodbye.
- **Exchange:** A part of a session that begins with an inquiry from the customer and concludes with a response from the agent.
- **Session response time:** The time it takes the organization to respond to the initial request for a session from the customer.

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- **Exchange response time:** The time that elapses between the customer sending a question or comment and the delivery of the agent's response.
- **Customer response time:** The time it takes the customer to read an agent's reply and send a response.
- **Exchange handle time:** The time it takes for the agent to prepare and deliver a response during an exchange.
- **Session handle time:** The cumulative total of the exchange handle times for the session.
- **Session transaction time:** The time elapsed from the beginning of the initial exchange to close-out.
- **Close-out:** The moment in time when the session is considered to be complete.

Key Decisions

A contact center that handles Web chat as a customer contact channel has several key decisions to make in order to staff for that channel effectively.

- **When to use a formal staffing approach:** While some organizations use chat extensively, it makes up a relatively small portion of the contact workload for many others. Until the workload is significant, consider using a less formal approach to determining staff. For those organizations needing just one or two agents to handle chat, advanced mathematical approaches will not yield any more accuracy than common sense. ICMI recommends that a sensible threshold is five — when you need five or more agents handling chat at any one time, a more disciplined approach will begin to pay off. (This is also a sensible threshold for social and other types of interactions.)

- **How many simultaneous sessions per agent to allow:** Some systems can be configured to enable 16 or more simultaneous sessions per agent — which, of course, is impractical from a human standpoint in most cases. The number of maximum concurrent sessions allowed will impact exchange response times, customer satisfaction, accuracy, and employee morale. For centers just starting out, no more than two or three concurrent sessions should be allowed until the center has more experience with this contact channel.

  To determine how far beyond one session at a time to allow, employing worst-case scenarios can be helpful. Multiply the maximum number of concurrent sessions that are expected by the average exchange handle time. The result will give you an idea of what could happen (worst case) to customer wait times. For example, if five customers initiate an exchange at the same time, and the average exchange handle time is 1.25 minutes, the last customer in line will have to wait 6.25 minutes for a response (5 x 1.25). This scenario

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won't happen often. But if and when it does, the delay would be well beyond the expectations of most customers. So, five concurrent sessions would be too high for an organization focused on delivering high levels of service.

- **When to send the customer's request to an agent:** When the system receives the customer's initial request, it can either send a generic greeting to the customer without sending the session to an agent right away or it can immediately deliver the session to an agent while sending an automated, personalized greeting from that agent to the customer. Since some customers will request a chat session, but not initiate an exchange, sending the session to an agent right away may tie up an agent too early. Given this possibility, relatively more concurrent sessions per agent should be allowed than in a scenario where an agent is selected only after an exchange is initiated.

- **When a session ends:** Often, the point of close-out is clear — but sometimes it's not. For example, customers may get what they need and ignore further attempts at communication; they may step away from their computers; or they might head off to competitors' websites. (Chat is often perceived to be less personal than phone calls, and customers may apply different rules of courtesy.) While the agent waits for a response, the session is considered active. Decisions must be made about how to reengage the customer, and when the agent can give up and close the session. The longer the threshold until close-out, the more time the agent will spend waiting for an exchange that may never occur; accordingly, a long threshold would suggest that a relatively higher number of concurrent sessions per agent can be allowed.

In short, staffing for chat revolves more around questions of workflow and technology application than on mathematical calculations. As volumes rise, you'll need to make decisions in each of these areas that are right for your organization and customers.

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6.7 Social Media

Key Points

- **Social media has become the place where online users will research and share information and opinions about products, businesses and organizations.**
- **Social media can have a dramatic effect on an organization and its brand.**
- **An organization must have a social media strategy in place in order to understand what people are saying about their products and services, while working to guide the direction of the conversation.**

Explanation

The various forms of social media, such as blogging, Facebook, YouTube, and Twitter, along with the more professional business oriented sites such as Linked In, are growing at an exponential rate. Understanding how social media works and effectively using these channels for communication with customers is vital for future success of an organization.

In traditional media, such as magazines, newspapers, radio and television, organizations typically have some control over the message delivered. Social media, on the other hand, has the ability to reach millions in a short period of time, free of charge and in an unstructured, uncontrolled manner. Traditional media is slower, costly, and not often seen as trustworthy or reliable. Social media, on the other hand, is based on conversations, sharing information, and building relationships over time. The message is being delivered by the consumer to other consumers and is often given more credibility than advertisements or magazine articles since the person posting the message is often a friend or trusted acquaintance.

Certain aspects of the monitoring of and response to social media should be included under the umbrella of the contact center. In most organizations, the center will need to have a tight partnership with the marketing team to ensure the right messages are tracked and managed. The customer experience and the company brand must be consistent across all communication channels and this includes social media. The social media group in the contact center should work closely with the marketing department in the development and content of these interactions. However, the social media strategy, which is just one component of the overall CRM strategy, must be carefully crafted

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and well planned.

Technology Enablers

The technology to support and integrate social networking into an organization's overall IT infrastructure is relatively new. However, due to the growth and impact of social media, organizations are looking for solutions and vendors are rapidly working to develop them. The tools used in social networking are numerous: member profiles, member directory, blogs, forums, wikis, groups and chapters, photo albums, and file libraries are a few examples. It will be important to integrate the most relevant tools of social media to your organization.

The technologies must be able to:

- Aggregate and isolate social media messages to keep an organization informed of what is being posted about it.
- Intelligently analyze and then route queries to the appropriately skilled agent, along with any information about the other channels of communication that customer has used to contact the organization. The system must also provide the agent with relevant social data such as their social reach (number of followers, friends, readers, etc.). This provides the agent with the total customer interaction experience before the agent responds.
- Provide agents with the ability to switch a customer interaction from a public to a private conversation. If possible, agents should keep the conversation in the same channel – since it was the customer's choice.
- Provide appropriate metrics and reports in a usable and tailored format that can be combined with other sources of information.
- Include the ability to measure positive and negative brand comments, effectiveness and speed of answer, number of contacts and others.
- Link internal information about customers to member profiles and member directories on various sites.
- Manage the brand consistently throughout the various sites; this includes the consistent update of information from one site to another.
- Create forums, apply useful content, promote the use of the forums, and moderate discussions on a continual basis.
- Populate information in the forums to build a knowledge base.

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6.8 Staffing for Social Interactions

Key Points

- **For staffing purposes, there are different types of social interactions:**
  - **Social interactions – real time, with single response**
  - **Social interactions – real time, with multiple exchanges**
  - **Social interactions – deferred**
  - **Internal interactions**

- **Staffing for social interactions should be driven by whether the work needs to happen immediately and whether it involves multiple exchanges.**

Explanation

For staffing purposes, there are different types of social interactions, each requiring a specific approach to resource planning. Here are some common variations:

- **Social interactions – real time, with single response**: In this setting, the organization handles interactions through social channels as they occur, with one response generally being sufficient. Typical examples include responding to customers with numbers they can contact, specific email addresses, or links to online resources that provide necessary information. These are service-level-type interactions, and the staffing approach is like that for inbound phone calls.

- **Social interactions – real time, with multiple exchanges**: In this case, the organization strives to handle interactions when they are initiated, and the dialog often involves multiple back-and-forth messages. Once engaged, customers may continue to ask questions or seek clarification. These are service-level-type contacts with staffing considerations like those of chat.

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- **Social interactions – deferred**: This approach involves addressing inquires or issues that do not require an immediate response. Common examples include responding to general inquiries posted on the organization's Facebook page, or sending responses, FAQ documents, or relevant links that address questions posted in forums. In this scenario, staffing is response time oriented, like that for email or outbound contacts that are scheduled.

- **Internal interactions**: As with other types of internal communication (instant messaging, phone calls, email, etc.), the impact of internal collaboration on staffing requirements must be considered in context. If dialog is necessitated by and happens while handling customer interactions, the time required should be reflected realistically in the average handling time associated with those contacts. On the other hand, internal communication that is not directly associated with handling customer contacts (e.g., it's for internal projects or, simply, the everyday communication that is part of a normal work environment) should at least be accounted for in overall schedule requirements.

Note that different systems will deliver social interactions to agents in different ways. For example, some present social interactions in email-like format. Staffing, however, should not be calculated in the same way as the center does for email. Staffing for social interactions should be driven by whether the work needs to happen immediately and whether it involves multiple exchanges.

Considerations for SMS messages (those that involve agents) are similar — do they occur at the time of initial inquiry (requiring a service level approach) or can they happen later (response time)? And, are they generally handled in one response (like a phone call) or do they require some back-and-forth (like chat)?

Multichannel queues, depending on how you use them, can include any combination of these channels and contact types. But keep in mind that getting staffing right is something that gets better with practice. And it goes to the heart of what contact centers have always excelled at: matching up supply and demand in real time.

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