

Research Report

Contact Center Staffing and Scheduling Practices



Overview	1
Study Results	1
Respondents' Background.....	1
General Scheduling Information	1
Figure 1: How Effective Is Scheduling in Your Center?	2
Figure 2: How Often Does Your Center Change Schedules?	2
WFM Systems and Scheduling Capabilities	2
Figure 3: Scheduling Tools (outside of WFM systems) Used by Centers	3
Staffing and Scheduling Practices	3
Part-Time Agents	3
Figure 4: Impact of Part-Time Agents on Contact Center Performance	4
Seasonal Agents	4
Figure 5: Impact of Seasonal Agents on Contact Center Performance	4
Outsourcing	4
Figure 6: Types of Contacts Outsourced	5
Figure 7: Impact of Outsourcing on Contact Center Performance	5
Compressed Schedules and Other Alternatives	5
Figure 8: Impact of Alternative Schedules on Contact Center Performance	6
Home Agents	6
Figure 9: Impact of Home Agents on Contact Center Performance.....	6
"Reserve" Agents	6
Figure 10: Impact of "Reserve Teams" on Contact Center Performance	7
Staff-Sharing.....	7
Figure 11: Impact of Staff-Sharing on Contact Center Performance	7
Conclusion	8
Appendix A.....	9
About International Customer Management Institute (ICMI)	10

Overview

Effective contact center management hinges upon effective forecasting and scheduling: Ensuring that you have the right people in the right place at the right time to handle your contact volume efficiently and with quality. A manager can get many pieces of the contact center puzzle right, but without a solid approach to workforce management and resource allocation, efforts to create consistently stellar customer experiences will fall short.

While part of getting the right people in the right places at the right times is science—successfully utilizing workforce management tools and formulas to forecast contact load and staff the center accordingly—a healthy amount of strategy and even art is required to

achieve ideal results. The best managers open their minds and explore various staffing and scheduling options, choosing those that best fit the needs of their center, the demands of their customers and the preferences of their agents. It can be a delicate balance. To learn more about contact centers' approaches to staffing and scheduling, ICMI recently conducted a detailed survey. In all, 361 contact center professionals (mostly North American) representing a diverse range of industries and sizes participated in the survey. The results revealed many things that centers are doing right with regard to staffing and scheduling, several things that need improvement, and a few surprises.

Following are the major findings from the survey.

Study Results

Respondents' Background

Respondents were fairly evenly distributed with regard to contact center size: 22.5% work in centers employing 21-50 full-time agents; 19.4% work in centers with fewer than 20 agents; 18.2% in centers with 51-100 agents; 14.5% in centers with more than 500 agents; 13% in centers with 101-200 agents; and 12.4% in centers with 201-500 agents.

Financial Services topped the list of industries represented in the survey—with more than one in four respondents (26.8%) working in Financial Services contact centers. Other industries that were rather well represented include: Utilities (8.3%); Medical Healthcare (8.3%); Telecommunications (5.8%); Property and Casualty Insurance (5.4%); and Government (5.4%).

While most respondents work in

U.S. contact centers, professionals from numerous other countries also participated in the survey, including dozens from Canada and several from Australia/Pacific Rim, Southeast Asia, Western Europe, Africa, Eastern Europe, India/Pakistan, and Mexico/Central America.

General Scheduling Information

In just over half of the centers surveyed (52.8%), a dedicated workforce analyst or team is in charge of scheduling. This is a positive finding, as it reveals that most centers are giving workforce management the focused attention it warrants. Having a dedicated WFM pro or team in place not only increases the chances that forecasting and scheduling will not be rushed and/or botched, it frees other managerial and supervisory staff to focus on

other key tasks, like quality monitoring and agent coaching and development.

Unfortunately, not all centers have this luxury. More than one in four centers (26.8%) rely on one of the contact center supervisors to handle agent scheduling, and another 19.8% of centers rely on a manager to do so. This does not automatically imply that these centers don't take forecasting and scheduling as seriously as those with a dedicated WFM team in place—nor that these centers are any less effective. In many cases, centers simply lack the staff and/or budget to justify having a dedicated team in place to focus solely on scheduling.

A few respondents reported using a combination of a WFM analyst/team and general contact center managers or supervisors to handle scheduling responsibilities, and a

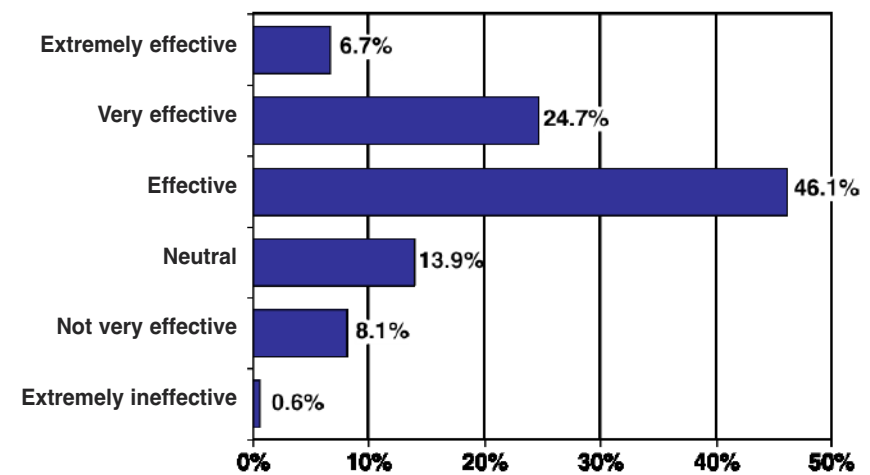
couple said that their center contracts with a third-party provider to run the scheduling show.

Most respondents feel that their center's scheduling efforts are either "effective" (46.1%) or "very effective" (24.7%), with another 6.7% stating that their scheduling efforts are "extremely effective." Fewer than 10% of respondents feel that scheduling in their center is ineffective. (See Figure 1.)

Of some concern is the fact that only 58.9% of centers surveyed measure forecasting accuracy (i.e., the percent variance between the number of inbound customer contacts forecasted for a particular time period and the number of said contacts actually received by the center during that time). Forecasting accuracy is very important, for underestimating demand leads to understaffing, which, in turn, leads to long wait times in queues, frustrated customers, burned-out agents and high toll-free costs (due not only to the long hold times, but also to the long diatribes by callers livid over the long hold times). On the other hand, overestimating demand results in waste and overstaffing.

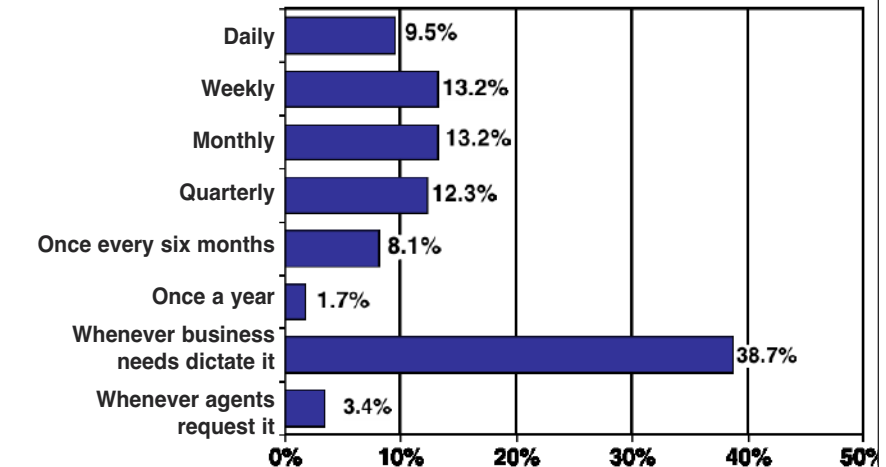
When asked how often their center typically changes agents' schedules, the most common response offered by respondents was "whenever business needs dictate it" (38.7%). Most of the remaining responses ranged from "daily" to "once every six months," with a handful of centers stating "whenever agents request it" or "once a year." (See Figure 2.)

Figure 1: How Effective Is Scheduling in Your Center?



Note: Due to rounding, some percentage totals may not equal 100.0 percent.

Figure 2: How Often Does Your Center Change Schedules?



Note: Due to rounding, some percentage totals may not equal 100.0 percent.

An important metric to consider when gauging WFM success is agent satisfaction with their schedules. Most centers surveyed indicated that their agents are either "satisfied" (51.4%) or "very satisfied" (10.6%), with another 27.2% of respondents stating that agents have a "neutral" perception of scheduling. Only 10% of respondents reported that agents are "unsatisfied," and just three centers in the entire study said that

agents were "very unsatisfied" with the scheduling process.

WFM Systems and Scheduling Capabilities

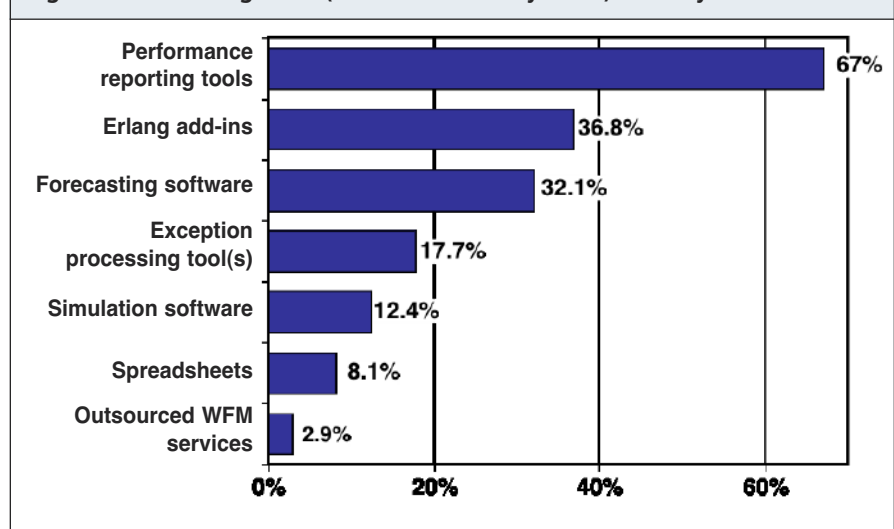
Just over half (51.9%) of respondents work in centers equipped with an automated WFM system to help drive the forecasting and scheduling process. These centers certainly have an efficiency advantage over centers that have yet to automate

the WFM process. WFM solutions can forecast call load, calculate staff requirements, organize schedules and track real-time performance of individuals and groups. However, managers should be careful not to become overly dependent on their software for forecasting and scheduling; thoughtful ingenuity and common sense should always supplement automation to ensure that creative and sound staffing decisions are made.

According to the study, Aspect is the leading provider of WFM solutions—with 37.1% of centers (that use an automated WFM tool) listing Aspect as their vendor. Not too far behind was Witness (26.4%), then IEX (22.8%). Two additional WFM providers cited by several respondents were Genesis (6.6%) and Pipkins (4.8%). Additional vendors listed include: GMT, Calabrio, Monet, Verint and Cacti.

Nearly three out of four centers (73.3%) that have a WFM system in place said that the system enables agents to easily access their own schedules online. Among those respondents, 88.2% indicated that the system featured an agent “self-service” component that allows agents—via their PC or a dedicated kiosk—to submit scheduling preferences, request time off, trade shifts, etc. Such capabilities give agents a feeling of control and empowerment with regard to scheduling in the center, and, thus, these features help to enhance engagement and commitment on the frontline. In addition, self-service capabilities

Figure 3: Scheduling Tools (outside of WFM systems) Used by Centers



help to free up WFM managers somewhat, enabling them to focus on more complex and pressing staffing and scheduling issues.

In some centers (30.6%), the WFM system further assists those in charge of scheduling via a “notification feature” that alerts WFM managers and supervisors whenever schedule changes are necessary due to sudden shifts in call volume.

Automated WFM systems aren’t the only applications that contact centers use to enhance the forecasting and scheduling process. Performance reporting tools, Erlang add-ins and specialized forecasting software are among some of the more common products utilized in respondents’ centers (see Figure 3).

Staffing and Scheduling Practices

Most centers surveyed use a host of different staffing and scheduling approaches to ensure that customer contacts are handled efficiently, cost effectively, and with quality—with-

out causing severe burnout among agents. Following are some of the more common approaches—and some not so common ones—used by respondents:

PART-TIME AGENTS

Nearly two-thirds of centers incorporate at least some permanent, part-time agents into the staffing mix—and effectively so: 70.9% of these centers indicated that using part-time agents has a “positive” or “very positive” impact on the center’s performance (see Figure 4 on next page).

Using part-time workers is a great way not only to fill staffing gaps, but also to attract skilled candidates who are either unable or unwilling to work full-time. By opening the contact center doors to part-timers, the center extends its recruiting reach to mature workers (55-75 years of age) who aren’t quite ready for full-retirement, as well as to qualified students, working mothers and others.

Any agent who is motivated,

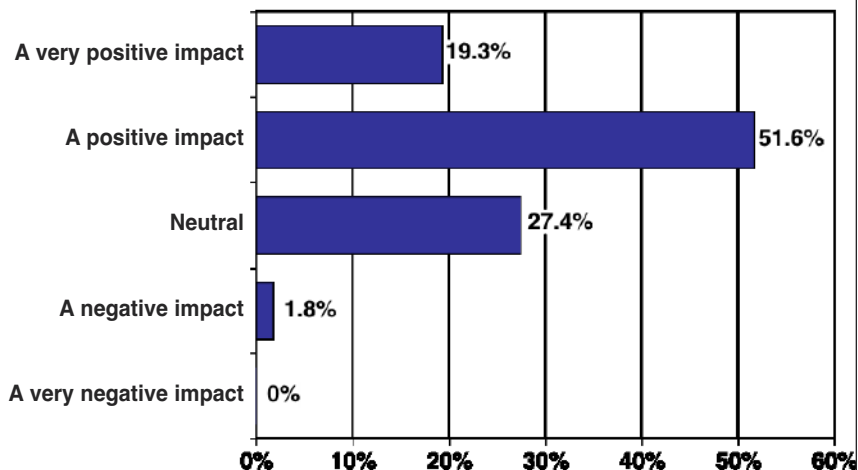
engaged and refreshed, and who is happy with his or her work/life balance, is a huge boon to any center—even if that agent only works 20 or 25 hours a week.

SEASONAL AGENTS

Where permanent, part-time agents work partial shifts all year round, seasonal agents—used in just over a quarter (27.4%) of centers surveyed—typically work full shifts part of the year. The biggest benefit of staffing with seasonal agents is that it allows centers to adjust resources to the predictable ebbs and flows of workload throughout the year. The drawback, however, is that such a staffing approach places the center in perennial “hire-and-fire” mode—that is, once the peak period for which the seasonal agent was hired ends, the agent is typically let go. The never-ending recruiting and assessment can be taxing on many centers, and, since seasonal agents know that their stay is temporary, it can be difficult to fully engage these individuals and get them to commit to providing the best customer support possible.

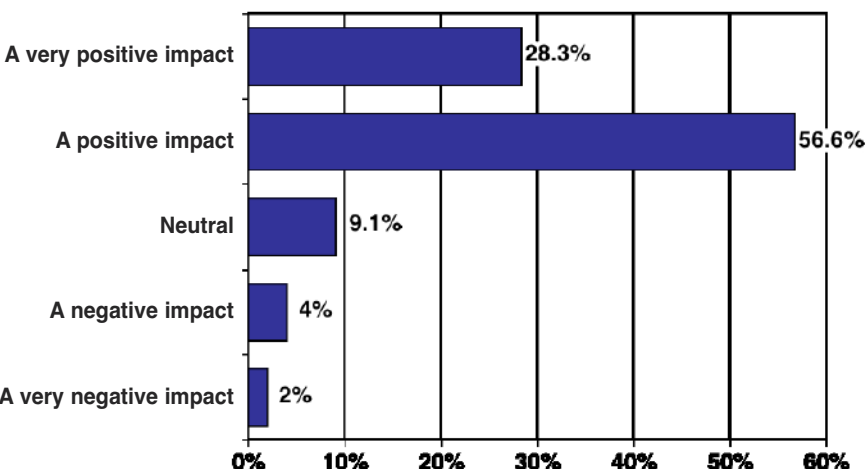
Evidently, however, most centers find that all the hiring and laying off is worth the effort: The vast majority (84.9%) of centers that reported using seasonal agents indicated that it has had either a “positive” or “very positive” impact on the center’s performance, as can be seen in Figure 5. A handful of centers, you will note, did report that this approach has had some negative effects.

Figure 4: Impact of Part-Time Agents on Contact Center Performance



Note: Due to rounding, some percentage totals may not equal 100.0 percent.

Figure 5: Impact of Seasonal Agents on Contact Center Performance



OUTSOURCING

Only 18.9% of centers surveyed use an outsourcing agency to add staffing flexibility and help handle contact volume. (Note: Another 3.2% of centers in the study actually *are* outsourcing agencies.)

The most common use of an outsourcing agency reported by respondents is assistance with handling basic request contacts (35.2%). Other types of contacts that are commonly

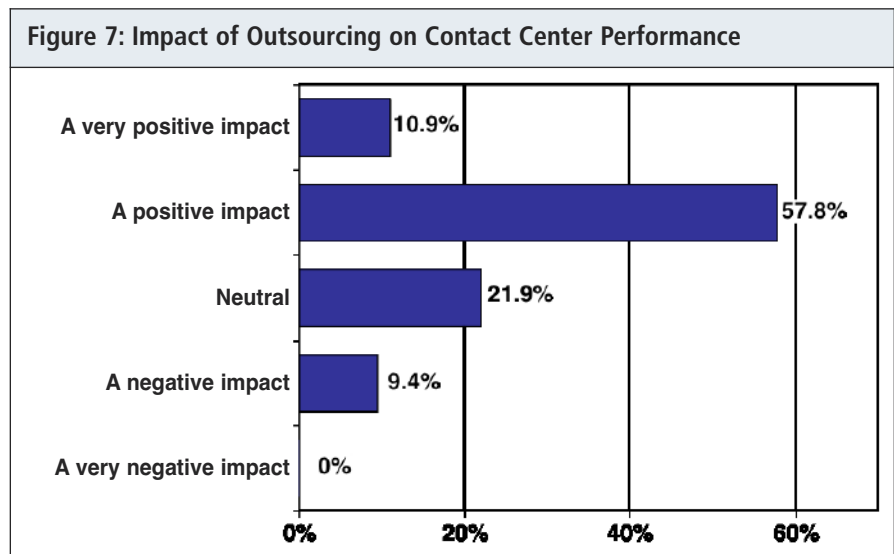
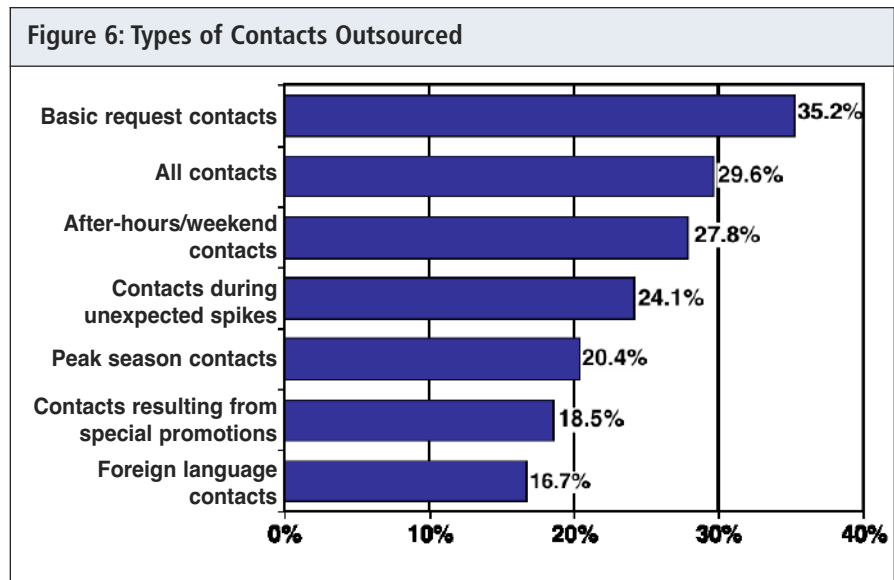
outsourced include: after-hours and weekend contacts (27.8%); overflow contacts during unexpected spikes (24.1%); and peak season contacts (20.4%). Several respondents indicated that they outsource contacts resulting from special promotions as well as foreign language contacts. Nearly one in three centers surveyed said that they use an outsourcer for assistance with all contacts. (See Figure 6 on next page.)

While most centers that outsource customer contacts reported that this strategy has had a positive impact on performance (see Figure 7), several (9.4%) said that outsourcing has had a negative impact—this is the highest “negative impact” percentage of any of the staffing/scheduling strategies covered in the study. This is not all that surprising, as stories abound of contact centers not fully satisfied with their outsourcing relationship, either because of problems in communication between the center and the outsourcer, the outsourcer’s inability to appear seamless to customers, or because of unexpected or hidden costs associated with outsourcing.

COMPRESSED SCHEDULES AND OTHER ALTERNATIVES

Many centers have gotten creative with schedules for full-time agents—playing around a bit with days and shifts to make the agent position more appealing to employees while simultaneously helping the center match staff to workload.

For instance, in 41.6% of centers surveyed, some agents work a “4x10” workweek—earning an extra day off each week by working a 10-hour shift for four days rather than an eight-hour shift for five days. A lot of centers that do this rotate 4x10 agents’ extra day off on a weekly basis so that each agent has a Friday off once a month for a coveted three-day weekend. Typically, no 4x10 agent has off on Monday—typically the busiest day at most contact centers.



Many centers that offer 4x10 shifts find that, in addition to having happier agents (not only because they have an extra day off, but also because they often avoid rush-hour traffic either on the way to or from work, or both), they have better phone coverage at night, as well. For example, prior to going 4x10, AMVESCAP’s Retirement Resource Center (a virtual operation with centers in Atlanta, Ga., and Winston-Salem, N.C.), found

that agents working at night were typically newer, inexperienced staff who got stuck working the least popular shift due to their lack of seniority. As a result, service quality and efficiency in the center often dwindled a bit after dusk. However, now that working until 9 p.m. means more days off, many of the center’s top agents have signed up for the 10-hour stint—and customer service no longer suffers when the sun goes down.

Some centers offer other “compressed” schedule variations; 35% of respondents indicated that some of their agents work longer hours some days (e.g., 10 hours for two days), and shorter hours on other days (e.g., eight hours for two days, then four hours for one day)—for a 40 hour workweek. Another 4.9% reported offering some agents a 9x80 schedule, which operates over a two-week cycle, with agents working four nine-hour days and one eight-hour day the first calendar week, then four nine-hour days (with an extra day off) the second calendar week.

Another scheduling alternative—though not all that unconventional—cited by respondents is to have agents work alternating weekends (29.5%). For a look at other alternative scheduling practices cited by respondents, see Appendix A on page 9.

So what impact has the use of less-than-traditional schedules had on centers’ performance? A decidedly positive one, as seen in Figure 8.

HOME AGENTS

Sadly, only 15.2% of respondents reported using home agents to help enhance scheduling flexibility and effectiveness. That more centers have yet to fully embrace the home agent concept today is bewildering, especially when you consider the very positive results reported by centers that have a telework initiative in place: In our study, 69.9% of these centers said that the use of home agents has had either a positive or very positive impact on the center’s

Figure 8: Impact of Alternative Schedules on Contact Center Performance

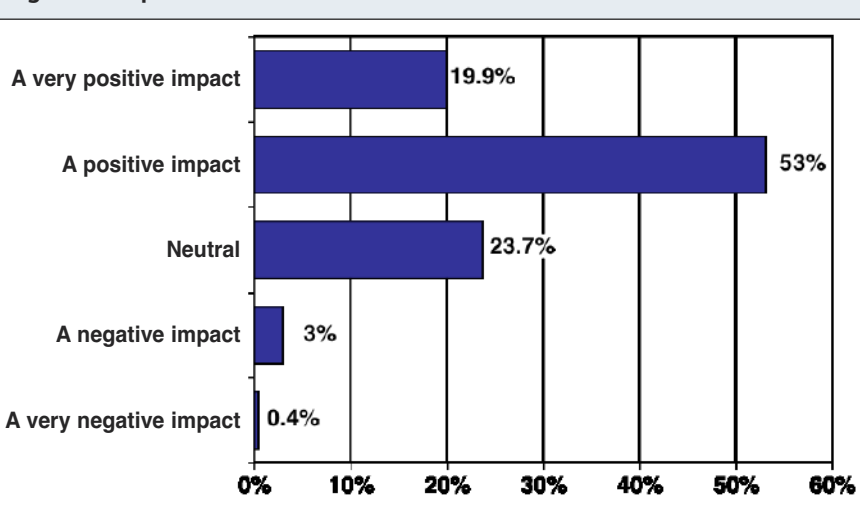
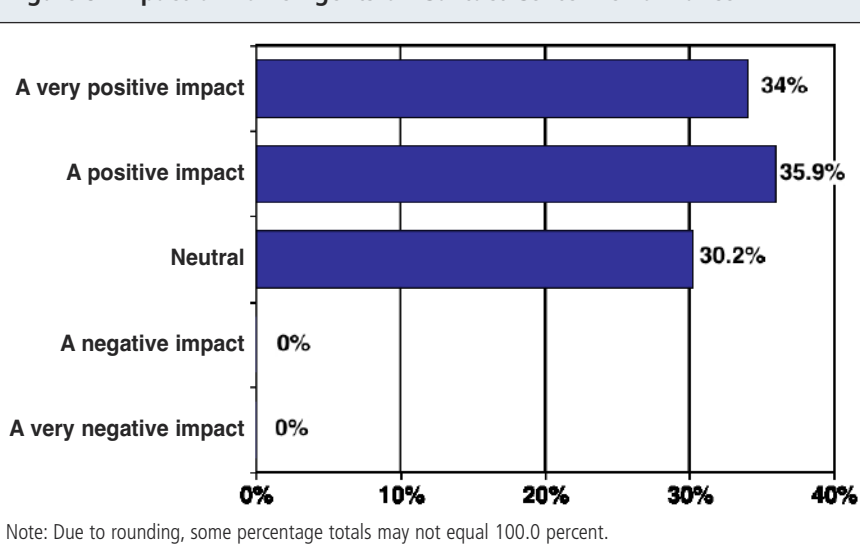


Figure 9: Impact of Home Agents on Contact Center Performance



performance; not a single center reported any negative impact. (See Figure 9.)

Numerous other studies have revealed the benefits of incorporating home agents into a contact center staffing strategy. For instance, in ICMI’s 2006 *Contact Center Telework* study, three in five centers (59.1%) reported that turnover among home agents was lower than that of inhouse agents—with 33% of them

indicating substantially so, and 51.6% said that home agents were more productive than their inhouse colleagues. (Nearly all of the remaining centers reported no measurable difference in turnover or productivity between home and inhouse agents.)

“RESERVE” AGENTS

Another resourceful staffing approach is the use of former agents (a.k.a., “reserve teams” or

“swat teams”) to help handle customer contacts during call spikes and peak periods—something that 38.8% of centers surveyed are doing.

Two in three centers that use reserve teams to help manage contact load report favorable results (see Figure 10), with just a handful of centers indicating that the approach has had a negative impact on the center’s performance.

While using reserve teams is a good way to retain—at least to some extent—the valuable skills and knowledge the center worked so hard to instill in former staff, the approach can be tricky, since former agents’ first priority, obviously, is to complete tasks at their current job and not to handle customer contacts. That being said, with careful planning and the building of solid relationships between the contact center and other departments, this crafty staffing strategy can be successful.

STAFF-SHARING

The most innovative and original—and, for that reason, the least common—staffing and scheduling strategy covered in this report is the sharing of staff with another company’s contact center. A typical staff-sharing initiative involves two centers with different peak seasons lending one another some of their agents to: 1) provide each center with the number of staff it needs during its busiest periods; and 2) to enable each center to reduce staff during slower times without having to lay off any agents.

Figure 10: Impact of “Reserve Teams” on Contact Center Performance

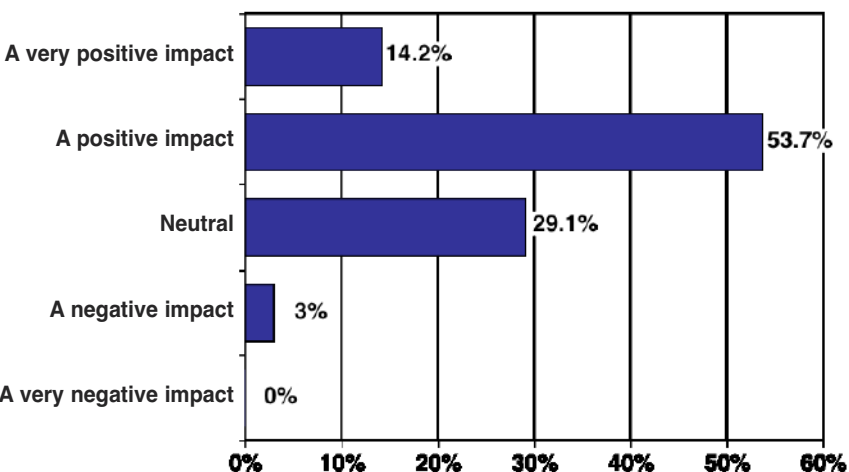
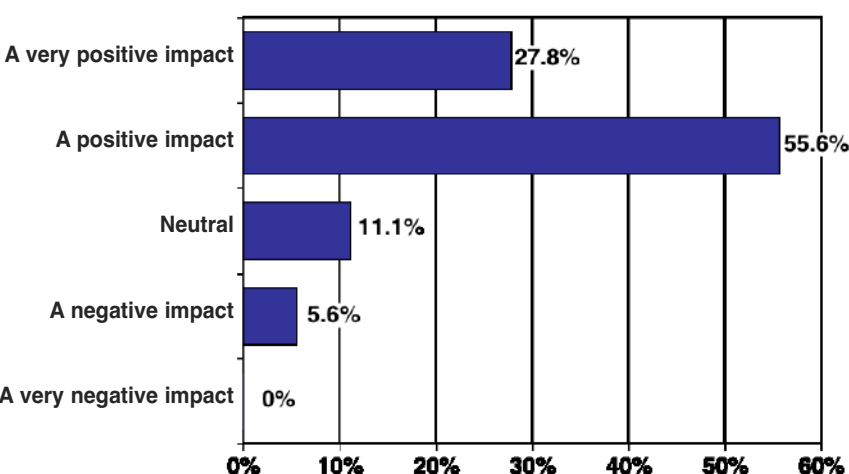


Figure 11: Impact of Staff-Sharing on Contact Center Performance



Note: Due to rounding, some percentage totals may not equal 100.0 percent.

Not surprisingly, only 5.2% of centers surveyed are currently involved in a staff-sharing initiative, but that is a big jump from a few years ago when only a handful of companies in our entire industry were exploring this unique staffing option. More good news is that, as shown in Figure 11, the vast majority (83.4%) of these centers report that their staff-sharing efforts have had a “positive” or “very positive”

impact on the center’s performance.

Expect to see more staff-sharing partnerships forming between contact centers in the near future: When respondents were asked if their organization would be open to such an arrangement (assuming it found a suitable partner in the region), 39.1% said “perhaps” and 7.9% said “yes.”

Conclusion

The survey revealed that much—though not all—is well in the area of workforce management in our industry. The majority of centers have a dedicated WFM specialist or team in place to focus on the critical tasks of forecasting and scheduling. Such specialization is paying off, as evidenced by the fact that over three-quarters of respondents feel that their center's scheduling efforts are highly effective or effective, and by the fact that agents in only a little more than 10% of responding centers are unsatisfied with their center's scheduling efforts.

Another positive pinpointed in the study is that many centers have added much color to their overall staffing palate—utilizing such potentially powerful staffing and scheduling approaches as part-time agents, compressed schedules, reserve teams, seasonal agents, outsourcing and home agents. Such eclecticism increases staffing flexibility, making it easier for centers to match resources to workload, and to keep the job more interesting for agents.

Of course, there is room for improvement in centers' forecasting and scheduling strategies. For in-

stance, too few bother to measure forecasting accuracy—a critical metric that helps centers become more consistent with scheduling and saves both customers and agents from much aggravation.

In addition, more centers could benefit from investing in an advanced WFM system, which can help centers vastly improve their grasp of the “science” side of forecasting and scheduling. Naturally, such an investment is simply not in the budget for many centers—particularly smaller ones. Fortunately, as mentioned earlier in this report, many smaller centers don't actually need a complex WFM tool; they do a stellar job of getting the right people in the right place at the right times using more organic, less technological methods.

It's good to see that contact centers have a solid handle on a process as essential as scheduling. All that most centers need to become WFM masters is a better understanding of the importance of forecasting accuracy, a little more exploration into the various staffing and scheduling options available, and perhaps a touch more help from what WFM vendors have to offer.

Appendix A

For the survey question about alternative schedules, we provided a text-box for respondents to provide answers that were not included among the primary choices listed. Except for minor editing of punctuation, spelling and grammar, respondents' comments are presented here verbatim.

Does your center offer any alternative full-time schedules to the typical 8x5 workweek?

1. Some agents work 9.5 hours four days a week, then half-day on Friday
2. We offer flexible work weeks that work for the business needs and agents' needs
3. We have two people who work three 12-hour days a week
4. Flex-time, as needed
5. Only during summer months—agents work a longer week to take a Monday or Friday off
6. Six days, six hours each shift—with three days off
7. We used to offer alternative schedules, but have gone back to the traditional
8. Six hours, six days a week
9. We have alternate start/stop times
10. We have unique start/stop times, and offer one-hour and half-hour lunch options
11. Agents come in one hour later one day a week and work one hour late
12. Weekends staff work 12-hour shifts, three days per week (they work 36 hours but are paid for 40)
13. Flex scheduling
14. Four weekdays plus Saturday
15. Six hour shifts for six days, both morning and afternoon shifts, then they have off for three days
16. Some agents work three 13-hour days per week
17. Two early shifts, two late shifts, two night shifts, then four days rest
18. Split shifts
19. We are a 24x7 center—agents work eight-hour or 12-hour shifts
20. Four nine-hour days and one four-hour day per week
21. Split shifts and different daily starts
22. Some agents work six-hour shifts in a six-day cycle, and then get three days off
23. We offer many flexible schedule types

About International Customer Management Institute (ICMI)

The International Customer Management Institute (ICMI) is one of the call center industry's most established and respected organizations. Founded in 1985, ICMI delivered the industry's first management-level conferences, educational programs and publications.

While ICMI's path-breaking work continues, the mission remains much the same: to provide resources and expertise that help individuals and organizations improve operational performance, attain superior business results and increase the strategic value of their customer contact services. Today's ICMI melds the traditional focus on consulting, training, and high-level engagement with CMP's strength in media and events to create a powerful one-stop-shop resource. Through the dedication and experience of its team, uncompromised objectivity and results-oriented vision, ICMI has earned a reputation as the industry's most trusted source for:

- Consulting
- Training
- Publications
- Events
- Professional Membership

Through constant innovation and research, ICMI's consulting and training services have become the industry's gold standard. ICMI publications, such as *Call Center Magazine* and *Call Center Management Review*, and events, including the Annual Call Center Exhibition (ACCE) and Call Center Demo and Exhibition conferences, continue to lead the industry. And ICMI's growing membership community now includes professionals representing organizations in over 50 countries.



International Customer Management Institute
Post Office Box 6177
Annapolis, Maryland 21401
410-267-0700 • 800-672-6177
icmi@icmi.com
www.icmi.com