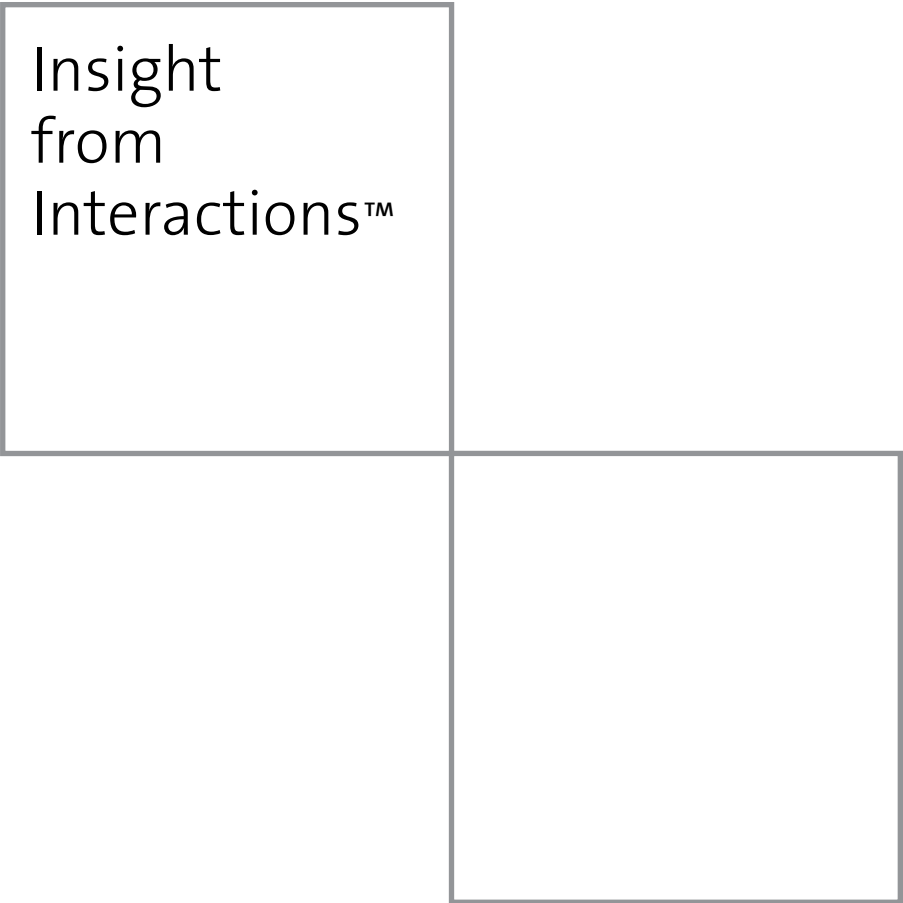




**IEX Workforce  
Management Group**



# **12 Secrets to Finding the Right Workforce Management System**

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White Paper

Evaluating workforce management systems? Seemingly small differences in the functionality of different products can have a major impact on the relative success of the contact center operation. This paper offers insight into the 12 secrets to finding the right system—one that's designed to help contact centers ensure the workforce management solution they choose will meet all their requirements today and long into the future.

## 12 Secrets to Finding the Right Workforce Management System

The contact center is the frontline of an organization. Customers turn to it to resolve issues and consequently form opinions about the company based on their experience. Those experiences directly impact the bottom-line.

For many, workforce management is often their first line of defense. These systems offer dramatic operational improvements – raising service quality while reducing costs. Although justifying the need for an automated workforce management system is simple, making an optimal purchasing decision can be tough. Seemingly small differences in the functionality of different products can have a major impact on the relative success of the contact center operations.

This article outlines a structured decision making process. One that's designed to help contact centers ensure the workforce management system they choose will meet all their requirements today and long into the future.

### 1. Establish an Evaluation Team

Establish a cross-departmental evaluation team that includes a representative from each department likely impacted by the technology. This includes contact center management, forecasting and scheduling staff, as well as IT training, and human resources. Having an evaluation team in place ensures decisions are carefully weighed and measured while building consensus among the group.

### 2. Define Expected Results

Once the evaluation team is in place, the group should clearly define what it expects to achieve. The center may expect to reduce personnel costs, improve service delivery, or gain the ability to plan and manage a complex environment. Once expectations are set, examine current business processes to see if changes are required. Knowing what the center wants up-front will help gain buy-in from internal stakeholders and define measurable goals.

### 3. Develop Evaluation Questions

In order to meet the group's expectations, build a list of vendor evaluation questions, the new product should streamline tasks within each user group and provide a pathway for adding new features and functions as departments grow. Questions should focus on "how" the system performs different functions, such as skills-based scheduling. Again, seemingly small differences in functionality from different vendors can make a huge difference.

### 4. Get a Live Demonstration

It is not enough to just see a PowerPoint presentation. The team will want to spend at least 4 hours going over the actual product to assess how it meets the center's operational requirements. Once the team has seen live demonstrations, the next logical step is to submit a request for proposal (RFP)

#### RFP Components

- A complete description of the operation, and the top issues it must address
- Feature questions and technical specifications
- Training, consulting, and support services
- Implementation process
- Cost
- References

Source: The Call Center School



When submitting an RFP, be sure to allow enough response time. As a rule of thumb, 3 to 4 weeks is usually sufficient. Here's a suggested time line: Week 1, deadline for the vendor to submit questions about the RFP in writing. Week 2, deadline for center to answer the vendor's questions, Week 3 or 4, (depending on the complexity) deadline for the vendor to complete and submit the RFP. This structure will allow enough time for an information exchange between the center and the vendor to ensure all RFP responses are thorough and accurate.

## 5. Check References

The vendor should supply a list of customer references with its RFP response. Ideally, these references will have the same size of operation, ACD, and contact types. In addition to relying on the customer references supplied by the vendor, it may be prudent to call customer references they didn't provide.

## 6. Evaluate All the Costs

The cost of a workforce management system is more than just hardware and software. It's important to understand all the initial costs and ongoing expenses. There may be additional staff costs associated, ACD upgrades required and much more (See Sidebar C). Keeping these things in mind will ensure the organization has budgeted for everything and is fully prepared for implementation.

## About the Author

Paul Leamon, is responsible for product marketing for workforce management products. During his 19-years at IEX and NICE Systems, he has consistently and successfully helped translate customer needs into real-world solutions. Leamon is an inventor and co-inventor on several noteworthy workforce management patents granted and pending. He holds a Bachelor of Science degree in Electrical Engineering from the University of Texas at Austin, specializing in Computer Engineering and he has presented contact center best practices at conferences around the world. Leamon has been published in several contact center and customer service magazines and newsletters.

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