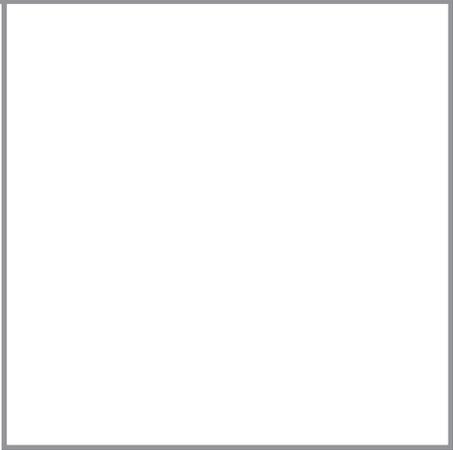




**IEX Workforce
Management Group**

Insight
from
Interactions™



12 Secrets to Finding the Right Workforce Management System

Paul Leamon, Director of Product Marketing and Strategy for the IEX Workforce Management Group

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.

About NICE Systems and the IEX Workforce Management Group

NICE Systems (NASDAQ: NICE) is the leading provider of Insight from Interactions™ solutions and value-added services, powered by advanced analytics of unstructured multimedia content. NICE addresses the needs of the enterprise and security markets, enabling organizations to improve operational efficiency, enhance customer insight, manage compliance and risk and ensure safety and security. NICE has over 24,000 customers in more than 150 countries, including approximately 85 of the Fortune 100 companies.

The IEX Workforce Management Group at NICE Systems provides feature-rich, scalable workforce and performance management solutions that improve planning and scheduling, enhance performance and streamline tasks. The IEX TotalView Workforce Management and IEX Performance Management systems are part of the NICE Enterprise portfolio that also includes compliance recording, quality management, interaction analytics and customer feedback. More information is available at www.nice.com/iex.



Disclaimer

Information in this document is subject to change without notice and does not represent a commitment on the part of NICE Systems Ltd. The systems described in this document are furnished under a license agreement or nondisclosure agreement.

All information included in this document, such as text, graphics, photos, logos and images, is the exclusive property of NICE Systems Ltd. and protected by United States and international Copyright laws.

Permission is granted to view and photocopy (or print) materials from this document for personal, non-commercial use only. Any other copying, distribution, re-transmission or modification of the information in this document, whether in electronic or hard copy form, without the express prior written permission of NICE Systems Ltd., is strictly prohibited. In the event of any permitted copying, redistribution or publication of copyrighted material, no changes in or deletion of author attribution, trademark legend or copyright notice shall be made.

360 ° View, Alpha, ACTIMIZE, Actimize logo, Customer Feedback, Dispatcher Assessment, Encoder, eNiceLink, eTrainer, Executive Connect, Executive Insight, FAST, FAST alpha Blue, FAST alpha Silver, FAST Video Security, Freedom, Freedom Connect, IEX, Interaction Capture Unit, Insight from Interactions, InSight, Investigator, Last Message Replay, Mirra, My Universe, NICE, NICE logo, NICE Analyzer, NiceCall, NiceCall Focus, NiceCLS, NICE Inform, NICE Learning, NiceLog, NICE Perform, NiceScreen, NICE SmartCenter, NICE Storage Center, NiceTrack, NiceUniverse, NiceUniverse Compact, NiceVision, NiceVision Alto, NiceVision Analytics, NiceVision ControlCenter, NiceVision Digital, NiceVision Harmony, NiceVision Mobile, NiceVision Net, NiceVision NVSAT, NiceVision Pro, Performix, Playback Organizer, Renaissance, Scenario Replay, ScreenSense, SmartSync, Tienna, TotalNet, TotalView, Universe, WebStation, Wordnet are trademarks and/or registered trademarks of NICE Systems Ltd. All other trademarks are the property of their respective owners.

Americas

2425 North Central Expressway
Richardson, Texas 75080
Phone +1 972 301 1300
Toll Free 1 800 433 7692

EMEA

Kaap Hoornreed 30
3563 AT Utrecht
The Netherlands
Phone +31 30 707 1300

APAC

16/F Allied Kajima Building
138 Gloucester Road
Wanchai, Hong Kong
Phone +852 2598 3838

IEX Workforce Management Group at NICE Systems

www.nice.com/iex