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Insight from Interactions™

The Visible Difference

Making Informed Decisions with Workforce Management

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White Paper

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Managing the daily results of the contact center requires constant decision making. Today's modern contact centers have complex routing strategies, multiskilled agents and multimedia contacts. Under these circumstances, decision making can be challenging. Considering the complexities, and what's at stake, operational visibility is crucial for carrying out the daily plan.

When it comes to providing contact center visibility, not all workforce management systems are the same. This paper will give you a peek into what you may be missing.

Contact centers that have made the leap from spreadsheet-based tools for forecasting and scheduling to an automated workforce management system know the difference is night and day--particularly as it relates to the operational visibility gained for making informed decisions. What is not so obvious, is how vastly different the level and quality of visibility is between top selling workforce management systems.

Whether or not your organization has transitioned from spreadsheet-based tools to automated workforce management, this paper will give you a peek into how advanced systems can help you see what is truly going on in your center.

The Value of Visibility

Anyone who has managed the daily results of a contact center can tell you that it is a daunting task, requiring constant decision making. And when the day is done, those decisions lead to one of two places: the center either achieves its goals or it doesn't.

When desired results aren't achieved, the center misses service goals, agents are either too busy or sit idle, costs get out of control, profitability is greatly reduced and customers who have a choice go elsewhere. When considering what's at stake, it is obvious success has nothing to do with the quantity of decisions made and everything to do with the quality.

So what is the key to making effective, proactive, quality decisions? In one word: Visibility. If you don't have vision into what has happened so far, what is happening now or an accurate picture of what could happen in the future, decision making is nothing more than a shot in the dark.

All workforce management systems provide at least a basic level of forecasting and scheduling functionality. Many systems also offer features and functionality that may or may not relate to core workforce management principles. But the real measure of a workforce management system's value lies in the visibility it provides into the data needed for effective decision-making.

Planning for Maximum Visibility

Every day in a contact center is like an event. Successful events require both careful planning to prepare for what you think is going to happen and effective, proactive management of reality once the day arrives. To plan effectively, you must start by answering these fundamental questions:

How many agents do you need?

How many agents do you have?

What are you going to do about the difference?

The more accurately you answer these questions, the better prepared your center will be to manage the day's events once it arrives.

How Many Agents Do You Need?

Some people think the primary purpose of forecasting is to predict how many daily contacts the center will get via telephone and other multimedia channels (e-mail, Web chat, fax, etc.). While determining the contact volume is essential, the real purpose of the forecast is to predict how many agents are needed to handle the contact volume.

To produce an accurate forecast, workforce management systems must consider both what happened in the past and what is likely to happen in the future. Again, all workforce management systems can produce a basic forecast. The problem is, most of today's contact centers need more than basic functionality to accurately forecast for multiple

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sites, complex routing strategies, multiskilled agents and multimedia contacts.

So what is the difference between a basic system's forecasting functionality and the functionality of a more advanced system?

- Basic systems offer functionality to plan for inbound call volumes only. Advanced systems provide functionality to plan for non-abandoning contacts like e-mail and web requests, etc.
- Basic systems forecast using a single average handling time value for the entire day. Advanced systems understand that actual handle time (AHT) values affect requirement calculations just as much as contact volume. For this reason, advanced systems calculate requirements based upon historical interval, not "flat-lined", AHT values.
- Basic systems can only forecast multisite environments as either one large entity or separate, distinct entities. Advanced systems are able to provide the best of both worlds. They are able to forecast all locations together to take into consideration large team efficiencies while still considering unique handling times, hours of operation and time zones for each center. The result is visibility into contact center forecasts from both an enterprise and local site view.
- Basic systems have significant challenges with accurately forecasting for multiskilled environments. Advanced systems understand that to determine requirements for a multiskilled environment, you need to consider what percentage of time each agent may be available for the contacts he or she is skilled to handle. To do this, advanced systems simulate a contact center's exact routing rules, agent skill assignments and agent schedules by date range.

Workforce management systems that can't take the nuances of your specific environment into consideration will not be able to provide accurate forecasts. How effective will your decision making be if you don't start with accurate visibility into agent requirements?

How Many Agents Do You Have?

Accurately determining the number of agents required is essential to the forecasting process. It is only when you create schedules against the requirements that you have visibility into how many agents you actually have to meet your contact volume.

Scheduling methodologies, or the rules and processes governing the types of schedules agents can receive and the manner of assignment, vary from contact center to contact center. Whatever your current methodology, it's important to evaluate the workforce management system's scheduling capabilities on the following levels:

1. How much administrative time will be saved?

Consider the system's ability to minimize manual effort associated with creating and assigning schedules. Even if the agents in your center work the same schedules from week to week, there comes a time when you may need to do new schedule assignments or bids to account for shifting call patterns or agent attrition.

Advanced systems offer a wide range of parameters designed to accommodate your particular scheduling methodology. The better you are able to automate your specific processes, the less time your workforce team will need to spend doing manual effort. In fact, some workforce management systems can virtually eliminate administrative time spent entering agent preferences and periodic schedule bids. Since time is money, if the center is looking for ways to reduce costs, it should not overlook systems that reduce time spent on administrative scheduling tasks.

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2. Will it optimize you center's scheduling methodology?

The second evaluation level relates to the system's ability to maximize efficiencies within a given set of work rules. People often talk about scheduling efficiency, but the work rules of many contact centers reveal a willingness to forego maximum efficiency in the name of agent satisfaction. Ensure the workforce system you consider has the ability to optimize whatever flexibility your center's scheduling methodology allows.

3. Does the system accurately reflect the agent's time against actual requirements?

Though often taken for granted, a third level exists that is particularly important for contact centers that have multiskilled agents. Make sure the system you are considering can accurately reflect the agents' time against the requirements for each of the contact types they handle. Remember, not all systems are alike. Even leading workforce management systems handle multiskilled environments differently.

In a multiskill environment, the only way to determine how much time an agent will supply for each of the skills they handle is to simulate the actual environment. This includes simulating the routing rules, skills of the agents and their schedules. Only then can you accurately calculate the percentage of time each agent may be handling his or her assigned skills. Sound complicated? Skills-based routing environments are complicated. Advanced workforce management systems understand these complexities and know that the only way to provide accurate visibility into a multiskilled contact center is through simulation.

What Are You Going To Do About The Difference?

After forecasting and scheduling has been completed, you can view the future state of the contact center. This allows you to make informed decisions. Proactive decision making can eliminate a great deal of additional work once the day arrives.

For example, before distributing schedules to agents, it is important to look at the surplus and shortage lines for each of your contact types. When viewing these lines, consider requirements that include a layer of overhead to account for shrinkage that will inevitably occur due to agent illness, tardiness and various other adherence issues. Toggling between both a bottom line requirement view and one that includes overhead will make it easier to determine whether or not current coverage is sufficient.

What you do about the coverage is up to you. Do you have surplus that allows you to schedule training and offer additional vacation days? Or are you so short staffed that you need to cancel pre-planned meetings and start preparing for overtime? Advanced workforce management systems can automate many of the manual tasks associated with carrying out the decisions. And even if you don't need to do anything, the ability to view coverage against each contact type's requirements sets the center up for success.

Maintaining Clarity

One mistake contact centers often make is putting all of their energy in forecasting and scheduling while giving little attention to managing and maintaining the results. It is vital for contact centers to understand that agent requirements and the number of agents scheduled are constantly changing values. Unless processes are in place for managing these values after the initial planning phase, the visibility needed for effective decision making is lost.

Vision into Surplus / Shortage Lines

Forecasting the number of agents you need is one side of the visibility equation. Remember, an accurate forecast is a combination of what has happened in the past and what may happen in the future. Given that the recent past typically carries more weight in an accurate forecast than ancient history, forecasts generated months or even weeks ago need to be updated.

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Advanced systems provide automatic intraday forecasts updates. This means that as the day progresses, the system automatically calculates a new forecast based on what has happened so far. Providing you with vision into future surplus/shortage lines based on the day's actual trend is one way advanced systems aid in proactive decision making.

Vision into Schedule Changes

The number of agents scheduled to handle contacts is the other side of the visibility equation. Schedules require constant maintenance in order to keep up with all of the changes. To get an accurate picture of the agent availability, schedule updates need to be made prior to the event whenever possible. Organizations that do not adjust schedules throughout the day have only limited visibility into projected agent resources. As a result, they often end up making decisions blindly.

That is why advanced workforce management systems incorporate tools to make schedule management as easy as possible. Drag-and-drop schedule modification, automated schedule trades and real-time schedule adherence are just a few of the ways workforce management systems keep the picture clear. An effective real time adherence (RTA) capability compares an agent's scheduled activity to their actual availability state using real time data streams from ACDs and media routers. Advanced RTA displays, with color coding and multiple sorting criteria, provide up to the minute information on agent activity, current adherence state and schedule adherence statistics.

Vision at the Point of Decision

Once the actual day arrives, an advanced workforce management system offers a significant return on investment. Not to undervalue the efforts put into good workforce planning, but you know what they say about the "best laid plans." Every day in the contact center is unpredictable. This puts contact center managers in the position of making on-going decisions when events do not go as planned. Given all the tools available in the market today, no contact center manager should have to face the day without vision at the point of decision.

If your center does not currently have a workforce management system, it may be difficult to imagine how an advanced system can aid in intraday decision-making. Even contact centers that have already invested in workforce management technology may be curious about how their current system measures up to other leading systems.

Below are some real life scenarios, or points of decision, that contact centers face everyday. Do your contact center managers have the visibility they need to make effective, timely decisions in these situations?

Service Level Lost

It's 9 a.m. and Rick is monitoring the day's results for the Customer Service department. When the most recent interval posts to his intraday screen, he sees that the service level goal was missed. From the same screen, Rick is able to quickly do a root cause analysis to determine the reason for the loss. From what he can see, average handling times were in line with the forecast. It's also obvious that the number of agents scheduled to be on the phone were actually there handling calls.

Rick then looks at the forecast-to-actual calls and, just as he suspected, that is where the problem lies--there are more calls arriving than expected. Since this is the only interval lost so far, and because it is still early in the day, Rick decides not to take action at this time. Instead, he continues to monitor the interval results to see if there is a trend.

After several intervals pass, Rick is relieved to see that no additional intervals have been lost. However, he has noticed a trend of higher than expected call volume for the majority of the day.

When he reviews his surplus/shortage line against the initial forecasted requirements, it looks as though he has sufficient staffing. He then reviews agent schedules against the system's automatically generated intraday forecast. Things don't look good. If this call trend continues, Rick can see

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that they won't have enough agents to handle the volume between 5 and 7 p.m. By viewing his Agent State Summary screen, Rick can see that there are some scheduled activities during the intervals that he can cancel or reschedule for another time.

Fortunately, just by canceling one team meeting, Rick will have enough agents to cover the shortage without having to schedule a single hour of overtime.

AHT Gone Awry

Angela is responsible for the results for the Repair business unit. This is a big responsibility considering that the calls are dynamically routed between three separate locations in two time zones. Lucky for Angela, her company's workforce management system gives her vision into all three sites with the added benefit of viewing them together, at the enterprise level, or individually at the site level.

Angela starts the day a little nervous because today is the first day agents are handling Repair calls in the third center. Though the agents have spent the past 2 weeks training, this week will be their first real opportunity to handle the calls in an "on the job training" capacity. To ensure they have all the support they need, the agents will work the same schedule they did while in training from 10 a.m. to 7 p.m.

So far, the day has gone smoothly. When the 10 a.m. results post, Angela sees that the service level was missed. Angela looks at the intraday screen expecting to see higher than forecasted call volumes, but that isn't the case. In fact, calls came in a little lower than expected.

She then looks at handling time at the business unit level and sees that it is significantly higher than expected. From the same intraday screen, Angela takes a look at the individual site statistics. Just as she suspected, the new Repair agents are causing the higher handling time. She calls and speaks with their training instructor who tells her that he anticipates their times to improve dramatically by the end of the week. However, it will likely be at least a month before their handling times are in line with the other, more experienced centers.

Equipped with this knowledge, Angela adjusts the AHT forecast for the new Repair Center for the remainder of the day. Immediately, she can see from her intraday screen that this oversight will put the day's results in jeopardy.

She contacts the forecasting team so they can make the appropriate adjustments for the remainder of the week and advises them that they should generate the existing forecasts again to consider each location's AHT separately. She then works with the management teams to cancel all non-essential activities and prepare for overtime up to 7 p.m. Thanks to Angela's proactive decision-making, the Repair department was able to meet their daily goal.

Missing in Action

After implementing their new workforce management solution, the managers at XYZ Technology Corp. were excited about the system's ability to automatically calculate agent adherence scores. They were even more excited about the real time vision it provides to monitor agent adherence.

They soon learned, however, that workforce management systems, even the most advanced ones, don't manage themselves.

If they wanted to solve the problems their agent productivity issues were causing them, they would need to put someone in place whose primary responsibility was to manage results. Given his previous workforce management experience at another company, Ron was a perfect fit for this position.

The first day on the job, Ron pulled up the intraday screen to see if there were any future intervals that could be in jeopardy. The day looked good so far and, if anything, it appeared as though they were slightly overstaffed. However, as the day progressed, things were not exactly as they appeared.

As results came in for the first few intervals, Ron could see that the number of agents scheduled did not even come close to matching the number of agents staffed. Due to lower than expected call volumes, they were still meeting their service

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level goals. But Ron was concerned that he was running the day blind if he didn't have vision into the number of agents actually available.

Ron pulled up the Real Time Adherence screen and saw red ... literally!

The system clearly identified agents who were not on the phone when scheduled, by displaying their names in red. Ron could see that he would need to work at putting some schedule change policies in place. But for now, he needed to find out where these agents were before they started missing service level goals.

He first sorted the screen so that the agents who were most out of adherence came to the top. Coincidentally, the first ten agents on the screen all reported to the same supervisor. Ron called the supervisor, and sure enough, he had the agents log off for a team meeting without alerting Ron. Ron quickly adjusted the schedules to reflect the meeting, which put the agents back in adherence.

The next group of agents reported to different supervisors, and as Ron worked through the list, it was evident that they weren't used to having to notify someone when agents called in sick.

After all schedule updates were made, Ron reviewed the adjusted surplus/shortage line and the projected service levels. The shortages created by the agents who called in sick meant that there was still work to do, but Ron was sure glad he was able to catch the problem while there was plenty of time to do something about it.

The TotalView Difference

If these scenarios sound familiar, there should be some comfort in knowing that your contact center is not unique. You may also find comfort in knowing that there are tools that can help your contact center manage the day just as effectively, and as proactively, as Rick, Angela and Ron. Making the right decisions to meet the day's results is a lot easier when you have the visibility an advanced workforce management system can provide.

IEX Corporation offers an award-winning workforce management solution focused on helping contact centers achieve desired results. Workforce management is at the heart of what we do, and our solutions reflect this focus. TotalView provides advanced workforce management functionality capable of handling advanced contact center challenges. Designed with visibility in mind, it enables workforce managers around the world to make effective decisions on a daily basis. Experienced users know workforce management's core value lies in its core functionality. TotalView ... the name says it all.

About the Author

Rebecca Wise-Girson began her career in workforce management in 1990 at AT&T Universal Card Services, where she participated in the selection and implementation of the TotalView system. In 1995 Rebecca joined IEX and held positions in both training and international sales support until she took a senior management position with the Convergys Corporation in 2000. Rebecca supported a team responsible for providing forecasting, scheduling and intra-day management services for the technical support services division of Convergys until September of 2003 when she re-joined IEX as a Sales Engineer. In this capacity she provides TotalView technical expertise and contact center consultative support to members of the regional sales management team and their prospective customers.

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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.

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