

# NICE IEX WORKFORCE MANAGEMENT ADVANCED

The NICE IEX Workforce Management Advanced and Optional modules help contact centers enhance operational efficiency and effectiveness

## Benefits

- Monitor and track agent schedule adherence in real time
- Conduct time off planning and schedule bidding online
- Automate time-consuming administrative tasks
- Get seamless data exchange between critical applications
- Obtain visibility into outsourced operations
- Manage multiple contact channels
- Gain a clear understanding of goals versus results

## INTRODUCTION

NICE Systems continually creates new ways to help you maximize service delivery while minimizing operational expenses. Our solutions help you spend less time pushing paper and more time managing your greatest assets — your people. We help you empower your agents and provide your managers with the information they need to make better decisions.

Our workforce management solutions address the complex challenges facing both single site and multi-site contact centers of all sizes. The NICE IEX Workforce Management system is a single, comprehensive solution for driving the performance of your contact center. By enhancing performance, improving resource planning, streamlining time-consuming tasks and integrating data between applications, the system enables your operation to deliver customer-winning service at the lowest possible operating cost.

Building upon the solid foundation of NICE IEX Workforce Management Standard, the system's advanced and optional modules deliver even greater power and performance to contact centers. These modules address the operational challenges associated with managing multiple contact channels, agent self-service, agent adherence, performance management, and data integration.



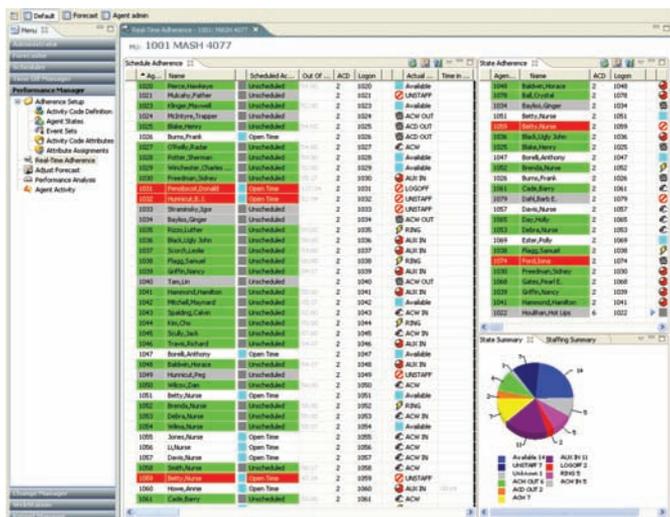
## REAL-TIME ADHERENCE

Real-time Adherence allows managers to monitor and track schedule adherence in real time

- Lower unplanned shrinkage and improve service levels
- Identify and correct problems in real time
- Hold agents accountable for their performance

Real-time Adherence provides up-to-the-minute agent state information by comparing agents' current versus scheduled activity using real-time data streams from ACDs and media routers. And if agents are logged into multiple contact routers simultaneously, you can easily see agent state and adherence information for each system. Supervisors are able to ensure agents follow their schedules so that staffing levels and customer service levels are not compromised.

The Real-time Adherence display gives supervisors an at-a-glance view of agent performance. It combines agent adherence information with schedules, adherence to work-state time limits and an overall summary of each state into an intuitive screen. By monitoring agent schedule and state adherence, managers can quickly identify those who need help or coaching while detecting agents who might be manipulating availability to avoid receiving new contacts.



**Real-Time Adherence**

The Real-time Adherence display also reveals agents who are late or fail to appear for their scheduled shifts, providing early indications of potential staffing problems. The Real-time Adherence display includes powerful features to monitor and manage agents from a single screen:

- Each agent's supervisor is identified so adherence specialists can quickly make contact as needed.
- User-defined colors and adherence thresholds allow supervisors to set their own adherence tolerances and display preferences.
- Agents are automatically sorted by multiple user-defined criteria, including time out of adherence, state, scheduled activity, agent name and others, so the most critical adherence issues are displayed first.

## TIME OFF MANAGER

Time Off Manager allows managers to automate time off and holiday planning while providing agents with an online bidding capability

- Automate time-consuming time off management processes
- Promote fairness in the workplace
- Improve agent morale

The Time Off Manager module streamlines the entire time off management process, allowing you to quickly and fairly respond to time off requests. It saves management time, ensuring objective, rules-based approvals, while improving agent morale by giving them more control over scheduled time off.

### Flexible Time Off Categories

With this module, you can apply unique accrual rates and limits to vacation or holidays, sick time, personal time or other time off. And a single time off balance can be spent across different activities, or each activity can maintain its own balance of time earned. The system rules you establish determine how many agents can be off on a given day, whether partial-day time off is allowed, and the date ranges that can be requested. Time off rules can be unique for different groups of agents within the contact center. You get the flexibility to group agents by skill type, shift, site or whatever you choose for managing time off.

### Time Off Requests

Agents can access the time off bidding screen via WebStation Plus on their desktop browser, using the color-coded calendar and intuitive screens to help them make or modify selections. The screen displays an up-to-date summary of their earned, taken, planned and remaining time off. The color-coded calendar clearly shows which days can be selected and how much time off is available.

In addition to managing ongoing time off requests, the Time Off Manager gives agents the power to periodically bid for time off based on seniority, rank or first-come, first-serve priority.

The system can be configured to use a series of bidding rounds, permitting agents to bid for a specified maximum amount of time off in each round. If the requested time is not available, agents can place themselves on a waiting list for that specific time slot. The bidding and wait list screens can be accessed directly by agents or managed by a supervisor.

### Additional Features

The Time Off Manager offers these additional capabilities:

- Supports partial-day, full-day and week time off selections
- Allows weekends prior to and following the selected time off week to be forced off
- Permits holidays to be set up individually or in groups for fair rotations
- Enables fair, automatic holiday assignment rotations by taking previous holiday work history into account
- Provides a view of time off data in hours or FTE days
- Maintains time off carry-over

## WEBSTATION PLUS

WebStation Plus gives agents and supervisors online access for viewing schedules, monitoring performance, viewing a wide range of reports and automating many common tasks

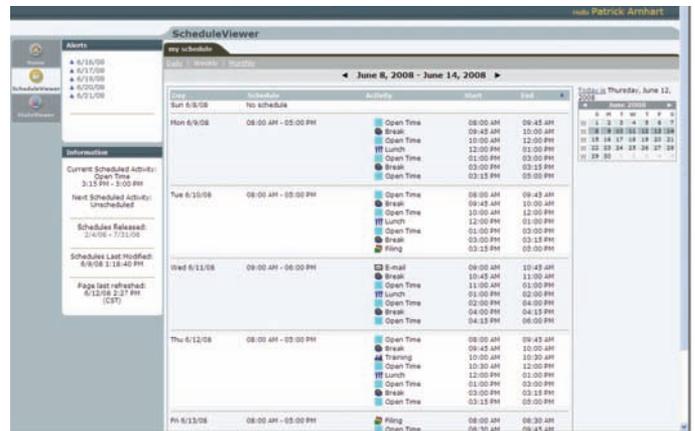
- Streamline time-consuming administrative tasks while reducing paperwork
- Improve agent performance and morale
- Allow management to process schedule changes and trades fairly

WebStation Plus lets agents and supervisors easily access work schedules and performance information via a Web browser. Automating many common tasks, WebStation Plus improves your center's productivity while promoting agent empowerment.

### ScheduleViewer

The ScheduleViewer feature enables agents to see daily, weekly or monthly schedules along with any changes. In fact, agents are automatically alerted to view and acknowledge schedule changes. Supervisors use the ScheduleViewer feature to see their agents' schedules and to verify that the agents have acknowledged

changes. If an agent calls in sick and schedules are updated, supervisors can be automatically notified and can view the changes.



ScheduleViewer

### StatsViewer

The StatsViewer feature is a built-in performance management tool. It displays each agent's current and historic performance statistics and, optionally, those of their peer group. Performance comparisons are shown using icons to help each agent quickly identify areas needing improvement.



StatsViewer

### Activity Tracker

The Activity Tracker lets supervisors see WebStation Plus activity at a glance. Activity Tracker monitors when agents have logged in and out, whether or not they have received a schedule change notification and whether or not they have acknowledged the change.

## Reporting

All reporting is done through WebStation Plus, giving everyone in the center access to information that's critical to their job. For example, planners can pull forecasting and staffing analysis reports, supervisors can view adherence statistics and agents can check their schedules. For added flexibility, the system allows you to export data into a variety of formats, including: Adobe Acrobat (PDF), Comma Separated Values (CSV) or Rich Text Format (RTF).

## Schedule Changes

The Schedule Change feature allows agents to easily request changes for vacation time, overtime work, personal time or other activities.

## Schedule Trades

The Schedule Trades feature empowers agents to manage their own schedules by letting them perform trades with another agent by means of a virtual "trade board" or directly with other agents. Agent trade requests can be processed automatically or approved by management. Configurable work rules account for agent skill capabilities, total work hours and many other requirements before granting trade approvals.

## Schedule Bids

The Schedule Bids feature lets agents bid on desired schedules without leaving their workstations. For example, onsite agents can use the bidding feature to select overtime and home-based agents can use it to bid on multiple segments to create schedules tailored to their availability.

## Time Off Manager

Time Off Manager lets agents request partial or full days for vacation, paid time off or other personal time. Agents may view their entire vacation calendar and waitlist for specific days that are unavailable. Agents can also enter holiday work preferences.

## Agent Preferences

The Agent Preferences feature enables agents to easily update their work schedule preferences. The range of preferences includes: days off, days to work per week, start times, lunch times, lunch lengths, stop times, fairness volunteerism and number of scheduled hours. Using the patented Custom Schedule Preferences feature, agents may designate which parameters are most important to them and the order in which they should be prioritized.

## SMARTSYNC EXCHANGE

SmartSync Exchange enables seamless data exchange with other contact center and enterprise applications

- Enable best-in-class center operations
- Simplify integration and maintenance
- Eliminate redundant data entry and streamline processes

NICE IEX Workforce Management holds a wealth of valuable information in its database — information that is crucial for the operation and useful for many other applications within the center and the enterprise.

SmartSync Exchange offers data imports and exports to enable advanced integrations between NICE IEX Workforce Management and other systems, including: quality monitoring, eLearning, human resources, employee resource management, performance management, agent scorecards, payroll, time keeping, custom applications, and IVR employee access. It streamlines the way your business runs by enabling systems to communicate with each other, eliminating paper-based processes and redundant data entry. This open, easy-to-implement module supports the rapidly changing technology environment of today's contact center, making it easier and less expensive to integrate with other systems.

### Enabling Advanced Integrations

Other workforce management systems use simple database access technologies to share data, so when these systems are upgraded, the interfaces often no longer work due to changes in the underlying database structures. SmartSync Exchange isolates the system's internal database structures from external solutions, enabling simpler, lower maintenance integrations with less downtime.

### Eliminate Redundant Data-Entry Tasks

SmartSync Exchange saves you significant time and money by eliminating redundant data-entry tasks. In most contact centers, agent information has to be entered into multiple systems: ACD, workforce management, payroll, human resources and others. Keeping these systems up-to-date requires a lot of work. SmartSync Exchange allows NICE IEX Workforce Management to automatically synchronize agent information with these other systems.

### Flexible Data Export Options

Exporting calculated information, such as schedule adherence for agent scorecards, summarized schedule time for payroll and forecasted staffing levels for performance analysis, is also

provided by SmartSync Exchange. The ability to export calculated data greatly simplifies the work needed to supply information to other systems.

### **Professional Services Ensure Success**

Our Professional Services group will set up your SmartSync Exchange data imports and exports for you and can schedule them to run periodically as needed to support the integrations you create.

## **MULTI-CHANNEL**

**The Multi-channel module enables effective management of multiple contact channels (email, fax, etc.)**

- **Simplify the complexity of running a multi-channel contact center**
- **Deliver consistent service across all channels**
- **Quickly and accurately account for agent requirements across contact types**

The patented Multi-channel module simplifies managing multiple channels, enabling your operation to provide consistent service while optimizing resources.

### **Flexible Service Levels**

The Multi-channel module lets you specify service level goals for each type of customer contact. You can even set multiple goals within the same contact channel, specifying a 4-hour response goal for service emails while allowing up to 24 hours to reply to general emails.

### **Channel-Appropriate Algorithms**

Accurately determining Multi-channel staffing needs requires calculations that mirror real-world conditions. For contacts that need to be handled quickly, such as telephone calls, patented simulation technology and BErlang-C algorithms provide precise interval-by-interval results. For contacts with a longer response window, such as email, a workload calculation provides the best answer. With contacts that can be deferred, a new level of planning is needed. In addition to forecasting when the emails will arrive, the system also plans the best time to handle them within the service level window. The Multi-channel feature uses the methodology appropriate for each customer contact channel, providing the accuracy needed to effectively schedule resources.

### **Multi-channel Service Delivery**

The Multi-channel module gives your operation a single integrated platform for managing service delivery across all channels. After

creating forecasts of the contact arrivals and when they should be handled, the system creates schedules designed to ensure you have the right people covering the right contact channel at the right time. But it doesn't stop there. As the day unfolds, Change Manager automatically keeps you up to date on the interval-by-interval performance of your entire operation. At a glance, you can see forecasted versus actual results, giving you an early warning if conditions change unexpectedly.

### **Active Backlog Management**

If not managed effectively, non-abandoning customer contacts like email can rapidly build up huge backlogs, threatening service levels and creating resource allocation problems. The Multi-channel module prevents these problems from occurring by actively managing the volume of backlogged contacts. Backlogs are automatically updated throughout the day to determine if a problem is developing that needs your attention. You can even specify an amount of backlog to be handled by a specified time. This enables you to analyze the impact on staffing so that you can determine if additional staff should be assigned to handle the backlog.

### **Works With Multi-skill Scheduling**

The Multi-channel module works with the Multi-skill module. This provides unsurpassed planning and service management in contact centers where agents cover multiple contact channels, handle more than one skill type within a channel or a mixture of both.

With the Multi-channel module you get complete flexibility in determining how multi-channel agents are scheduled. Whether your center handles multi-channel contacts using separate groups, continuously routes them using "universal queue" technology or schedules them to be worked in specific time blocks, NICE IEX Workforce Management manages it all.

## **PERFORMANCE MANAGER**

**Performance Manager helps you align and achieve corporate goals throughout your organization**

- **Gain a clear understanding of goals versus results**
- **Empower employees for self-management and improvement**
- **View individual and team metrics with automated reporting**
- **Provide clear executive visibility for better decisions**

Performance Manager provides a single, comprehensive solution for tracking, reporting and managing performance throughout all levels of your contact center operation. Your employees will have a

clear view of how their performance compares to their personal and department goals, while management will have a better view of the factors driving operational results to establish and align goals.

### **Provide Meaningful Information**

Understanding actual results as they compare with goals is the first step to improving performance. Performance Manager provides this information quickly and effectively with detailed employee scorecards, automated reports for managers and supervisors, as well as dashboards for executive visibility with drill-down capabilities.

With comprehensive online reporting capabilities, managers and analysts can conduct root-cause analyses with ease. You'll also be able to access a variety of sales and performance data from multiple sources in a single application. Performance Manager takes you beyond simply seeing "what" is happening in your business to discover "why" it is occurring.

### **Motivate Positive Performance**

Performance Manager helps everyone in your organization do their job better with easy access to information and quick feedback on performance:

- Agents can better self-manage and improve with a clear understanding of expectations and their actual performance.
- Managers and analysts are able to break free from spending hours each week consolidating spreadsheets and reports from different systems and, instead, can spend that time on more valuable activities such as coaching and root-cause analysis.
- Executives have a comprehensive view of the enterprise, with the ability to drill down to view specific performance data — all the way to the agent level — for better business decisions.

### **Get Results Fast**

Performance Manager is an optional module of the NICE IEX Workforce Management system, providing a solution that gets you up and running quickly. With standard, pre-built connectors, metrics and key performance indicators (KPIs), Performance Manager is quick to deploy and easy to maintain.

Performance Manager comes with built-in support for multi-site management. You can view information and perform analysis at any level — from your entire operation to individual sites, contact types and queues.

### **Data Integration, Storage and Reporting**

Organizations utilize a variety of systems to help employees perform their jobs more efficiently. Performance Manager

integrates data from our workforce management and quality management systems and imports data from other sources to create the business-focused information that you need to drive success. Based upon your business requirements, Performance Manager creates a single performance data warehouse.

Consolidated data is stored to enable direct access via online dashboards, scorecards and reports to display historical views of information.

Automated processes eliminate the need for manual manipulation and spending hours chasing information and consolidating spreadsheets. As a result, managers and supervisors have more time to focus on areas and individuals that need help to improve overall performance.

## **EXPRESS MESSENGER**

**Notify Agents and Supervisors of Schedule Changes Instantly and Automatically via Email to Office, Home or Wireless Phone.**

- Send notifications to ensure agents and supervisors have the most current schedules
- Automate the process of communicating last-minute schedule changes
- Send messages to multiple email addresses, including wireless phones, for each recipient
- Communicate changes to other supervisors and managers

The ability to modify and adjust staff schedules as your needs change is critical to the efficiency of your contact center. You need the right number of people with the required skills to meet varying demands throughout the day. But when schedule changes are made, your schedulers face the time-consuming task of notifying the supervisors, who must then, in turn, notify their agents. This can be a daunting challenge, especially when supervisors can't reach the agent personally. They simply can't be assured that the agent is getting the message about their schedule changes. This is especially critical if it impacts the schedule later in same day.

Express Messenger helps ensure that your agents and supervisors are aware of their schedules, even when schedules change at the last minute. Express Messenger sends schedule change notifications by email to the agent's and supervisor's office, home or wireless phone. For wireless emails, you have the flexibility to send short emails indicating which days of their schedule have changed or long emails with a full summary of their daily schedules to home or office email addresses.

### Instant, Automatic Notifications and Interactive Communications

Whether schedule adjustments involve last-minute meetings, coaching sessions, or a different assignment, Express Messenger alerts your staff of the changes. Approvals of last-minute requests, such as vacation, can also be communicated through Express Messenger. The agent knows right away if the request has been approved, and the supervisor knows to not expect that agent for the day.

Express Messenger is more than just a notification tool. It gives agents the ability to reply to messages if they have questions about their schedules. Their message is routed directly back to the workforce management desk. Users of WebStation Plus will be able to access their updated schedule online when they receive their notifications in the office environment.

- Multiple language options are available for the notifications.
- Email notifications can be sent to an agent's home, work or wireless phone, as well as to supervisors and other managers.
- If a supervisor is on vacation or ill, a covering supervisor can be set up to receive notifications in their absence.

### Less Administrative Work and Better Informed Agents

Express Messenger means less administrative work for your supervisors and workforce managers. Instead of spending time calling agents with schedule changes, they can focus on managing your people and operations. Agents will appreciate that there's never any question about their schedule, because they'll have the most current information available at their fingertips.

## ABOUT NICE

NICE Systems is the leading provider of intent-based solutions and value-added services, powered by advanced analytics of unstructured multimedia content – from telephony, web, radio and video communications. NICE's solutions address the needs of the enterprise and security markets, enabling organizations to operate in an insightful and proactive manner, and take immediate action to improve business and operational performance and ensure safety and security. NICE has over 24,000 customers in more than 150 countries, including more than 80 of the Fortune 100 companies. More information is available at <http://www.nice.com>.

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