



The Modern Contact Center and Workforce Management's Vital Role:

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Contact center managers are under increasing pressure to deliver a higher level of customer service with a lower operating budget. Workforce management technology specifically addresses this crucial area. It gives the center vision into the current state of the business while helping it realize vast improvements: decrease telecom expenses, meet service level targets and reduce staffing costs. Organizations already realizing a higher level of efficiency with automated workforce management technology can take it to the next level with complementary technologies. Agent empowerment tools, performance management and strategic planning systems promise to take the center to an unsurpassed level of efficiency. This white paper explains the vital role of workforce management technology in a modern contact center and offers a glimpse into complementary technologies designed to enhance its value.

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Introduction

Contact center managers are under increasing pressure to deliver a higher level of customer service with a lower operating budget. Since the contact center's largest expense generally lies in its agent staff, it is only natural for management to focus on the human resource angle of the operation.

After all, having the right number of agents, with the right skills in place is critical to delivering high quality service while controlling costs.

Workforce management technology specifically addresses this crucial area. It gives the center vision into the current state of the business while helping it realize vast improvements. Automated workforce management technology helps the center decrease telecom expenses, meet service level targets and reduce staffing costs.

Organizations already realizing a higher level of efficiency with automated workforce management technology can take it to the next level with complementary technologies. Agent empowerment tools, performance management and strategic planning systems promise to take the center to an unsurpassed level of efficiency.

There is a wide range of technologies on the market today that can maximize the value of existing workforce management technology.

This white paper explains the vital role of workforce management technology in a modern contact center and offers a glimpse into complementary technologies designed to enhance its value.

“Customer service levels have risen consistently, while at the same time saving us money through reduced spending on overtime wages, non-productive agent time and telecom expenses.”

- AAA
Oregon/Idaho

Benefits of Automated Workforce Management

Managing an agent workforce involves a myriad of tedious and time-consuming tasks. Managers must build forecasts and set schedules that consider call volumes, agent preferences, training needs, off-phone meeting times and much more. The time-consuming nature of this process makes it nearly impossible to run the center efficiently using a spreadsheet-based solution alone. In fact, respondents to a study conducted by AMR Research overwhelmingly agreed centers with more than 60 agents need more than spreadsheets to effectively forecast and schedule.

"Traditional methods work fine if you have 25 or 30 customer service agents. But if you are running a distributed network of call centers and need to generate twice-hourly updates to ensure optimum staffing efficiency, you need a far more powerful system."

Bank of Montreal

Spreadsheet Solutions	Workforce Management Software
Manual	Automated
Limited to one user	Allows simultaneous access
Time consuming administrative tasks	Frees time spent on administrative tasks
Forecasting accuracy isn't assured	Take the guesswork out of forecasting
Fixed schedules are inefficient	Flexible schedules to improve efficiency
Difficult to track changes	Extensive reporting capabilities
Lack Flexibility	Make changes on the fly
Limited reporting capabilities	Easy to assess and fine tune operations
Make "what-if" nearly impossible	Easy to see the impact of business changes
Can't integrate with other systems	Seamlessly integrate with contact center technologies

Figure 1: Spreadsheet v. Automated Workforce Management

The Automated Workforce Management Process

Workforce management is an ongoing four-step process (see Figure 2) that begins with forecasting and planning. Once the forecasts are in place, workforce managers develop optimal schedules that take call volumes, agent preferences and training/meeting times into account. Automated systems allow schedules to be changed on a weekly, daily or hourly basis to reflect

'real-world' contact center activity. Performance is evaluated based on that 'real-world' activity, and then the schedule is further tweaked to include those results.



Figure 2: The Workforce Management Process

Step 1: Forecasting/Planning

The planning process starts with accurately forecasting call volumes, handle times and overhead to determine staffing and scheduling requirements.

Understand the center's call history: Call history information is obtained through the center's automated call distribution (ACD) system. ACD records show the peaks and valleys of call history and help determine future resource requirements.

Measure the scheduling impact of agent preferences: Consider meetings and training, breaks and lunches, holidays, etc., to ensure planning accuracy while taking agent preferences into account. Consider the ACD currently in place: When considering a workforce management solution, it's important to understand how well the system will work with the center's ACD. This will ensure the workforce management system can take advantage of all the ACD's sophisticated capabilities.

Choose a system with flexible forecasting: One of the most important components of a workforce management system is flexible forecasting. When call volumes are higher than expected, the contact center needs the ability to adjust schedules in real-time. Without this capability, the center runs the risk of missing its service goals.

"More accurate forecasting and skills-based scheduling have enabled us to maintain service levels with fewer fulltime employees - saving an estimated \$400,000 annually."

Spherion

Step 2: Scheduling

Workforce management technology gives you vision into contact center operations. This vision helps contact center managers build effective schedules that strike an optimal balance between resources and costs. The scheduling capabilities of a sophisticated workforce management system extend beyond inbound phone calls. These systems can help the center:

- Handle e-mail, web and fax activity either through dedicated agents, a universal queue or block scheduling.
- Quickly create schedules that take into account work rules, planned off-phone activities and known absences.
- Automatically create schedules that meet both forecasted staff requirements and agent work rules—in a single step.

“Workforce Management technology has allowed us to change the way we manage our business on demand.”

Carlson Hospitality Worldwide

Step 3: Change Management

Even the best workforce management system is useless without the ability to make changes to plans based on ‘real-world’ scenarios. Sophisticated workforce management technology tracks contact center activity in real-time.

Based on this real-time information, managers are able to make up-to-the minute schedule adjustments as call volumes and other variables change. For example, the contact center manager may need to move breaks and lunches after experiencing higher than expected call volumes during the morning. The flexibility to make schedule changes in real-time helps the center maintain consistent service levels throughout the day.

Step 4: Performance and Adherence Analysis

Assess Operations: Performance analysis enables contact centers to assess operations and make quick modifications to plans and processes. This helps minimize costs, increase efficiency and maximize profits. Automated workforce management technology allows contact center managers to spend less time crunching numbers and more time looking for ways to improve operations. Using sophisticated workforce management technology, users can quickly assess short and long-term:

- Staff plans
- Schedules
- Current and projected performance
- Planned versus actual performance
- Queue utilization
- Agent availability

“Better schedule adherence is saving us \$300,000 per year.”

Spherion

Ensure the Plan Gets Followed: Adherence reports allow workforce managers to review both historical and real time performance statistics. This allows managers to ensure agents follow their schedules throughout the day. They can also use these reports to easily:

- Identify and correct problems in real-time
- Document agent behavior for trend analysis, performance analysis or counseling
- Hold agents accountable for their performance

Achieving Unsurpassed Efficiency

Contact centers that have realized the value of workforce management are also in a position to take advantage of new performance optimization technologies. Agent empowerment, performance management and strategic planning applications, to name just a few, hold the promise of bringing an unsurpassed level of performance to contact centers.

Agent Empowerment

Web-enabled self-service technologies give agents more control over their schedules, while cutting down on administrative work. Agents can submit shift bids and trade requests, enter work preferences, ask for vacation time and much more--right from their desktops. Rules-based processes working in the background ensure the needs of the organization as a whole are maintained while giving agents the freedom to act independently. Using self-service technology, agents can see how their contribution impacts the center at-large with desktop access to key performance statistics. These advanced empowerment features promote responsibility and accountability that improve overall contact center morale.

“Performance optimization products give a snapshot of performance ... taking contact center productivity to totally different levels.”

Frost & Sullivan

Performance Management

Performance management applications enable substantial improvements in the contact center through constant feedback, training and rewards. These applications benchmark individual agent activity against the group at-large, which agents use to motivate themselves toward their individual performance goals. These statistics can also be measured against industry best practices to benchmark the overall performance of the operation.

Through the establishment and tracking of key performance indicators (KPIs) for the center, performance management applications provide an enhanced view of execution and success-determining factors. This improved understanding provides a sound foundation of information and awareness upon which to base strategic decision and problem assessment activities.

Strategic Planning

Strategic planning tools use both historical and forecasted information as well as business simulation techniques to perform sophisticated 'what if' analysis. This helps managers do budget forecasting, build recruiting strategies and anticipate service quality based on specified factors. They are particularly useful in determining the impact of attrition or outsourcing on service levels. Because the data is balanced against variance and risk assessment reports, it allows contact centers to easily discern the impact of business changes on plans and requirements. With it, centers can quickly identify performance optimizing goals and infrastructure configurations.

Key Considerations: Selecting a Solution

Environment: Consider the size of your contact center today versus its projected growth and associated staffing levels. Some systems work better in multisite environments than others. If the center is a single site today but may grow to a multisite center, it is important to ensure the workforce management system can grow with you in the transition.

System Architecture: Sometimes that comes down to the type of server offered. Consider system scalability. Can the system be maintained using a single server that can easily handle more sites, agents and software options? Or will it require a forklift upgrade to grow the system? Issues such as how many agents can be input into the system or how many queues it can handle must be considered.

Feature Availability: When considering future upgrade requirements, do a thorough analysis of the workforce management provider's track record on feature evolution. If workforce management isn't the company's flagship product, competition for engineering resources may put them behind. Some vendors provide upgrades at no additional charge under an existing maintenance agreement. Others may require a forklift upgrade to get the latest features.

Skills-based Routing: If the contact center is using or plans to use skills-based routing, make sure the workforce management system selected can take full advantage of all the center's ACD's capabilities. For example, can the system work with reserve or least occupied agents?

System Integration: Does the workforce management system enable data to be easily shared between the contact center and the rest of the enterprise? A sophisticated system allows the following technologies to seamlessly interconnect: quality monitoring, eLearning, human resources, employee resource management, analytics, agent scorecards, payroll, time keeping, custom applications, ACDs, e-mail, other contact routers and IVR employee access. This type of integration should enable single data entry across multiple systems, and extend beyond the initial release for easy upgrades.

System Supplier: When analyzing workforce management providers, it is important to ensure they will meet the center's needs today and well into the future. Look at their growth. How many agents and contact center sites do they support? Multinational companies should find a provider that thinks globally. They will invest in translations and can easily connect multiple global sites into a single environment.

Aside from a strong, growing customer base, consider the company's stability. A stable company will be around to evolve with the center's changing business needs.

It is one thing to have great technology, but another to stand behind and support it with customer focus as a key priority. Investigate the company's implementation, training and professional services package. What do they do to ensure industry best practices and actively involve users in product direction?

Conclusion

Workforce management technology balances contact center resources and requirements to achieve a higher level of customer service with reduced staffing costs. As technology continues to advance, contact centers can also take advantage of the wide range of technologies that complement their workforce management system. Agent empowerment, performance management and strategic planning technologies are just a few of the technologies that promise to bring a higher level of efficiency to the center.

About the Author

Debbie May co-founded IEX Corporation in 1988. As president, she is responsible for setting the vision and direction of the company while overseeing its daily operations. Under her leadership, IEX has been profitable for more than 15 years. Inquiries can be sent to Debbie via e-mail at debbie.may@iex.com.

About IEX Corporation

IEX Corporation, a subsidiary of NICE Systems Ltd. (NASDAQ: NICE), is a leading provider of feature-rich, scalable workforce management software that enables contact centers to develop accurate forecasts and build efficient staff plans. Founded in 1988, Richardson, Texas-based IEX has a strong global market presence in over 45 countries with more than 900,000 agents in over 3,100 sites. IEX is part of the NICE family of companies, which offers the industry's broadest set of contact center business performance and analytics solutions. In addition to workforce management, the NICE product portfolio is comprised of quality monitoring, interaction analytics and performance management technology. These solutions address the entire spectrum of contact center business issues while supplying valuable strategic information to enterprise-level decision makers. For more information about IEX, visit <http://www.iex.com>. For more information about NICE, visit <http://www.nice.com>.