



Technology Optimization Part 4: Workforce Management

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When I scout for the potential to hit a technology optimization home run, Workforce Management (WFM) comes to mind immediately. Its capacity to forecast, schedule, and track the overwhelmingly largest line item cost in your center (your staff!) certainly warrants a place in the starting line-up. Perhaps it hasn't had the best batting average over the years, but the right investment in time, resource, process development, and coaching could turn it into a star hitter.

WFM gets at the heart of a goal for every center: use resources wisely to provide good (if not excellent) service to customers. Labor comprises two-thirds to three-quarters of a center's operating budget. [See *Strategic Contact's 2008 series on cost optimization in NACC's In Queue*, dated April 4th, April 19th, and May 9th.] WFM projects workloads and produces staff schedules – monthly, weekly, daily, hourly, quarter-hourly – that provide consistent service to customers while managing labor costs. As powerful as this tool can be, we see common themes that challenge its use:

- Despite a wide range of solutions (functionality and costs), centers don't do a good job aligning their requirements, their ability to forecast, and their scheduling flexibility with the capabilities of their system. We see home-grown solutions or low-end tools where a robust solution is needed. And we find \$100,000+ systems doing work that a good spreadsheet could do.
- New WFM staff are required to fill the cleats of their predecessors without the benefit of spring training. A few enterprising players might figure out how to make the system work. Most simply get by with barebones familiarity and a bunch of home-grown spreadsheets in their back pockets. [If I had a nickel for every forecast or schedule I've seen in Excel...]
- Thinking WFM can run on auto-pilot once it's set up, management doesn't invest the time and resources to use the system effectively for real-time management, ongoing analysis and workforce optimization.
- WFM analysts and supervisors lack the processes and/or incentives to collaborate that ensure schedule adherence and effective adjustments when events deviate from projections.
- Tied to all of the above, the organization lacks understanding of the importance and role of WFM and its connection to business goals and defined performance objectives.

Here are some actions to take to optimize WFM technology and its application in the center:

1. If you have a WFM system, assess your needs and look at what you're doing – and how you're doing it – to address them. Create a WFM role, if you haven't done so already. Get training for analysts, and set up processes from end-to-end to handle forecasting, scheduling, tracking, and real-time monitoring, with defined action plans. Restart your current system, or go find one that is a better fit if you must. It's OK if some things need to happen outside WFM. Just make sure there's a legitimate business reason for doing it, not an overwhelming impulse to invent your own wheel. Supplementary models occur most often with unusually complex forecasting requirements based on business drivers, financial analysis, or "what if" scenarios for options and tradeoffs.
2. If you don't have a system, look at your requirements. What is the nature of your volume? Is it dynamic or static? What are your hours of operation? How much flexibility do you have in scheduling, across how many shifts? How many ancillary things do you need to schedule (e.g., breaks, lunch, training, team meetings, etc.)? Once you've answered these questions, think carefully about the processes and tools you'll need to forecast and staff effectively, and pursue the right system to support your vision. Then follow the other advice in Step 1.



3. Make sure that the folks with oversight of WFM are accountable to the folks who have responsibility for the center's performance, and that there are defined processes between the two. Supervisors need to ensure the right resources are in place at the right time. WFM analysts need to be plugged into what is happening in the center and what needs to be done about it. Educate all front-line staff on things like service level, adherence, Key Performance Indicators, and their role in ensuring the center achieves its KPIs. Tie the success of the WFM analysts to the success of the front-line.