

## **Peak Season Coverage “Best Practices”**

Contact managers look to industry “best practices” as they plan for significant increases in contact volume driven by seasonal demand and/or anticipated events. There is no single recipe for success, as each organization must account for its distinct business goals, context, cost, and resource constraints. We offer the following considerations based on successful peak season programs across a broad array of clients. Use this list to stir your thinking on how to plan for success during your next peak season.

### ***Strategy: The peak season plan is aligned with and supports the contact center operations strategy***

- Marketing and other business partners supply timely forecasts to support adjustments to staff, processes, and technology
- An executive sponsor balances customer service requirements with cost considerations to set realistic expectations for key performance indicators that drive peak resource planning
- Sourcing, hiring forecasting, and scheduling strategies align with business needs to deliver the appropriate staff levels with the required skills and experience
  - Facilities constraints may drive usage of outsourcers and/or home agents
  - Permanent part-time employees, support staff, and other resources may provide additional seasonal relief
  - Coverage plans take into account expanding capacity through extended hours to minimize peak hours by spreading daily volume increases over a longer period
- Processes are designed to minimize backlog under heavy volumes
- The technology plan provides adequate capacity and uses resources efficiently as staff expands and contracts
  - Trunking, licensing (ideally based on max concurrent), and other capacity supports peak volumes, with flexibility where possible (e.g., through hosted applications, SIP trunking)
  - Agents have access to the requisite applications, knowledge sources, and internal communications tools (e.g., IM)

### ***Organizational Readiness: The human resources plan allows for rapid staff expansion to achieve business goals while providing appropriate supervisory oversight and control***

- Management builds a “deep bench” of core contact center expertise in the front line and support staff to allow for formal and informal mentoring of seasonal staff
- Management identifies the core team and defines seasonal roles at least 60 days before ramp up
  - New roles have clear responsibilities, goals, and objectives
  - Staff positions with multiple duties off-peak are streamlined to address critical needs during the peak season
  - Management identifies resources to assist through an “all hands on deck” initiative
  - A ramp down plan considers staff release by week and by role once peak subsides
- The center provides HR with its staffing needs 4-6 months in advance with appropriate provisions for anticipated turnover
  - Seasonal temporary agents and QA have simplified roles and responsibilities
  - Job descriptions with clear roles, responsibilities, and accountabilities for seasonal peaks address special needs – e.g., trainer, floor walker/SME, escalation desk, real time WFM analyst, supervisor coach



- Candidate pre-screening delivers qualified candidates with the right skills, aptitudes, and preferences to succeed in an accelerated training and indoctrination plan
  - HR communicates the need for flexibility – e.g., weekend coverage, changes to scheduled work days or blocks on short notice (48-72 hour), mandatory overtime
- Year-round communication preserves relationships with high-performing seasonal team members

### ***Personnel Management: Operational policies and procedures sustains service excellence within budget during peak season***

- Training
  - Trainers (e.g., in-house and outsourced) use the same course content to bring new hires up to speed on products, systems, policies, and processes as well as call handling soft skills and stress management. Seasonal agents may handle simple or limited call types while existing agents handle complex or a broader call type range.
  - New staff demonstrate core knowledge and skills before placement in the center and have frequent follow-up to promote effectiveness and minimize errors
  - On-line content refreshers reinforce classroom training and invite requests for help or coaching
  - All staff – new and tenured – receive training on manual system down procedures for unplanned failures due to heavy volumes
- Scheduling
  - Incentives (e.g., special sales incentives, mid-morning treats) entice staff to work shifts with higher volumes (e.g., Monday morning)
  - Management offers Voluntary Time Off (VTO) when traffic is shown to lag behind forecast
- Performance and Quality Monitoring
  - Quality monitoring frequency by agent is maintained to ensure quality remains at the desired level
  - All reps (new, experienced, in-house, or outsourced) are held to the same performance standards
  - A Voice of the Customer (VoC) program monitors the effectiveness with which staff address customer needs
- Ramp down
  - Staff – new and tenure – participate in end of peak season evaluations to comment on the center’s successes and opportunities for improvement in peak season ramp-up and quality guidance

### ***Technology Use and Optimization: Technology enhancement and use enables increased volume coverage***

- Inbound contact volume increases are minimized through automated proactive outbound notifications/alerts by call, email or SMS text message, or by web chat and collaboration
- Calls are contained or agent volumes reduced by limiting queues through conditionals with dynamic messaging and options to help customer find alternatives at busy times
- IVR self service use is optimized through status-based messaging, additional self service functionality, and improved user interface
- Handle times and transfers (within and between teams) are reduced and shortened through system efficiencies, process improvements, screen pops, and knowledge management tools, content, and searching functionality
- Center capacity and customer satisfaction is expanded through technology providing estimated wait time and allowing call back options
- Existing technology is optimized in use and performance through routing using business rules for call type/media/skills routing and prioritization tied to agent skills, and increasing screen pop percentage