

## **Contact Center Workforce Management “Best Practices”**

Workforce Management (WFM) assumes the mantle of responsibility for making efficient use of the contact center’s most important (and most expensive) asset – its front-line staff. While there is no single recipe for success, the following list provides guidelines for consideration as you develop specific organizational and operational workforce management requirements.

### ***Organizational Strategy: The WFM organization is aligned with and supports the contact center operations strategy***

- The organizational structure covers the five WFM disciplines and ensures that planning and analysis functions are not overpowered by the demands of day-to-day management (see Figure 1)
- WFM analysts have the proper skills, training, and experience to excel in their assigned roles
- WFM processes provide transparency in forecasting and scheduling with visibility into resource requirements and effectiveness by skill set
- WFM, operations, and HR work collaboratively to source appropriately skilled front line resources using a cost-effective staffing model
  - Staff analyzes recruiting pipelines, attrition, labor efficiency, and quality metrics to provide insights on preferred staffing models
- Monthly, weekly, and daily meetings between operations and WFM ensure that all players are on the same page regarding performance, expectations, and game plans
  - Staff discusses the prior period’s results and explains variances; the group discusses and agrees upon action plans for the upcoming period
  - WFM sends communication daily to outline the game plan and associated contingencies

### ***Forecasting: WFM leverages historical data and business planning input to produce accurate workload estimates by interval***

- Marketing and other business partners supply forecasts of planned activity in a time frame that supports adjustments to front-line staff; changes to plan are communicated promptly
- WFM, operations, and representatives from the business meet periodically to review and approve planning input, forecasting assumptions, performance outlooks, and actions
- Forecasters monitor historical trends (volume, handle times, self-service success rates), labor shrinkage, and attrition data to refine future workload and staffing estimates
- Analysts maintain iterations of forecasts and the associated input/assumptions to assess the impact of variations in business plans, operational parameters, and staffing levels

### ***Scheduling: WFM optimizes labor utilization to meet service level objectives while accommodating management and employee needs***

- The center supports an established process and schedule for submitting requests for time off, overtime, training, meetings, coaching, and other non-contact work
- Scheduling balances the business needs for efficiency and expense management with employee needs for predictability and flexibility
- Labor shrinkage and other scheduling factors are monitored closely and adjusted as necessary
- Proactive analysis of staffing and scheduling options improves operational effectiveness – e.g., fully leveraging agent resources, tuning occupancy, defining and managing agent skills



***Real-time Management: WFM makes adjustments in real-time to respond to variations in contact volumes, handling times, and staffing levels that materially impact service levels and/or costs***

- Staff has real-time visibility into performance data and agent adherence to schedule; operations provides immediate notification of schedule exceptions for real-time updates
  - Agents understand the impact of schedule adherence on service levels, customer satisfaction, and employee morale
- WFM provides operations with meaningful intraday/daily/weekly activity reports that compare actual to plan and identify performance drivers; WFM works with operations to define action plans that address significant variances
- Operations is staffed, trained, and accountable for real-time schedule adjustments to cover daily/hourly contact volume changes
- Proactive communication (e.g., wallboards, dashboards, on-screen alerts) notify the front line of current status, changes, and required actions

***Reporting and Analysis: WFM supplies real-time and historical reports to assess operational performance and support continuous improvement***

- WFM and Information Technology (IT) leverage system resources to create reporting frameworks that automate preparation and delivery of operating reports
- Staff provides concise, contextual analyses of historical data, outcomes, and trends in a form that is relevant and actionable by management
- Agents, Supervisors, Managers, and Directors use scorecards and dashboards to gain visibility into KPIs relevant to their roles and responsibilities
- Staff manages ad hoc report requests through a formal process that addresses submission, prioritization, tracking, and delivery/acceptance

***Technology: Operations and WFM have the technology tools to meet service levels while optimizing labor utilization***

- The technology infrastructure supports efficient call routing and resource utilization with minimal manual intervention
- The center uses WFM applications appropriate to its size, operational complexity, and technology infrastructure; staff leverage system capabilities and minimize use of home-grown tools (e.g., spreadsheets)
- Where feasible, data warehouse, and report generation tools equip “power users” to create custom operational reports
- WFM participates actively in relevant technology and process initiatives to ensure end-to-end assessment of options, trade-offs, and effective project and change management planning

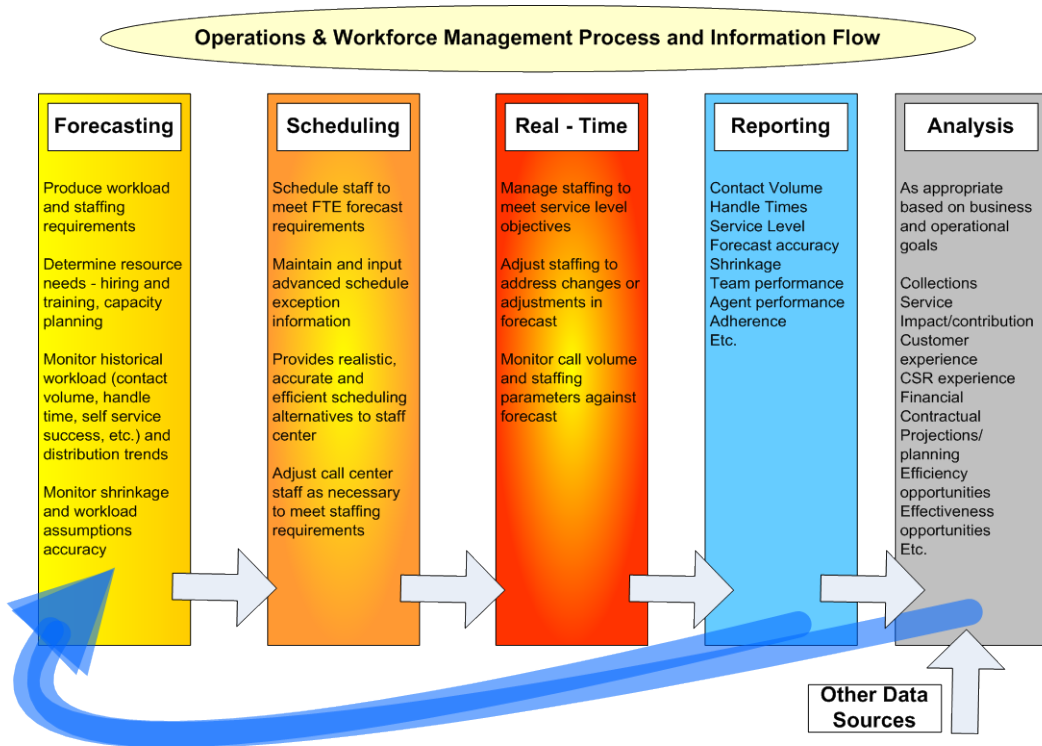


Figure 1: Workforce Management Operations