

Hundreds of varied companies, including EBay, rely on Expert Planet LLC to address business inquiries that vary from product support to marketing. They provide a high level of customer service, matching the right products and services with the right people. Based in New York, Expert Planet is a product support call center that goes beyond the typical order entry-type call center by offering over 400 extremely knowledgeable, “expert” agents who work remotely from their homes.

## The Challenge

Expert Planet agents are located throughout the country. They pride themselves on offering their workforce with the flexibility to work from home anytime, anywhere. But coordinating agents for a 24 hour schedule, 7 days a week in an efficient and transparent way proved extremely challenging. Managers found they were constantly running around, updating schedules and in desperate need of a better means of communicating with their workforce. Vice President of Agent Operations Paul Hedgecock explains, “We used Excel. People would send in the times they wanted to work and we would block out those times to confirm it.” But as the business grew, Excel proved too cumbersome to accommodate. Scheduling agents based on call volume projections, dealing with last minute changes, and different schedules from week to week made it almost impossible to use a manual scheduling process.



After reviewing several scheduling solutions, Expert Planet came to the conclusion that they would need a system that:

- Possessed a high degree of transparency and flexibility for their agents
- Made it easy to communicate to individuals, groups, and the organization as a whole
- Was accessible anytime to provide greater flexibility for agents working on a 24/7 schedule

## Shiftboard Online Scheduling Software

Before Expert Planet decided on Shiftboard and because they are familiar with virtual operations as a virtual call center, they considered the option of creating their own system versus purchasing one. Research indicated that in order to develop a robust online scheduling system that met their business requirements, they would need one part time product manager and two full time developers for 9-12 months, and at least one developer on an ongoing basis for feature improvements. That system would only offer basic features and would require a year long wait time and a minimum financial investment of \$250,000. Instead, Expert Planet signed a contract with Shiftboard for a total cost of \$15,000 in the first year, or a nearly 20:1 payback.

After signing the contract, Expert Planet’s customized Shiftboard schedule platform was up and running within a few days, with painless implementation. “The rollout of Shiftboard was very straight forward, we

didn't have to do a whole lot of training," said Hedgecock who estimates managers new to the system need only an hour to an hour and half of training to get up to speed. He also indicated agents (end-users) simply refer to a 30-minute PowerPoint training presentation and "once they use Shiftboard a couple times it's pretty well engrained."



Hedgecock immediately noticed the payoff. The management team was able to reallocate time previously consumed by the scheduling process, and Expert Planet agents were able to focus on the job rather than spend time updating their availability, sending emails, and waiting to see if it was actually received and integrated into the new schedule. They found that the agents valued the convenience and efficiency of using Shiftboard, communicating that they "love being able to see their schedules and print them out all in one place...they also really like getting schedule reminders."

Today, Expert Planet uses Shiftboard to simply post shifts to the calendar and allow agents to sign in, sign up and self manage their own schedules entirely. Through this process, they have noticed the day to day frustrations of agents has decreased, presumably resulting in a lower turnover rate and

that communication between agents and managers was greatly improved with the ability to send broadcast messages out to all or a select group of agents quickly and as often as necessary. "Going from a straight manual system to Shiftboard was absolutely necessary," explains Hedgecock. "Today, our agents can confirm, release, change or add work seats with just a few simple clicks. It's exactly what we need to provide the high levels of service that our clients expect in a virtual environment."

With the transparency and flexibility that Shiftboard provides, Expert Planet has been able to save the time and money previously allocated toward scheduling, and been free to focus on a much more important need- successfully growing their business.

## Shiftboard ROI

When Expert Planet first approached Shiftboard, two full time employees were dedicated solely to schedule coordination. Had they continued to schedule agents manually, they would require eight additional full time staff, in order to accommodate their growth, which would cost upwards of \$200,000 annually. Instead, Expert Planet switched to Shiftboard which eliminated the need for additional employees. By switching to Shiftboard and paying an annual fee of \$15,000, Expert Planet is potentially saving \$185,000, indicating Shiftboard provided a 15:1 return on investment.