ROUNDTABLE: BEST PRACTICES IN WORKFORCE MANAGEMENT
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CRMXCHANGE

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Hello, there! We're Call Design. Pleased to meet you.

We specialize in Workforce Optimization solutions through custom software development, out of this world support, personalized training and consulting services.
Seismic Shifts are Changing Workforce Optimization

Cloud
- Lower TCO
- Better technology
- Single ACD/WFO vendor

User Interfaces
- Agent engagement
- Rapid learning
- Higher productivity

Omni-Channel
- Forecasting models
- Quality management
- Multi-skill associations

Mobile
- Flexible agent tools
- Virtual centers
- Rapid availability of agents
Four Fundamentals of Workforce Optimization

Promote Positivity

Adopt Accessibility

Correlate Caring

Engage Employees
Promote Positivity
★ Leaders should be involved and curious
★ They don’t just talk, they model behavior
★ Share leaders’ scores
We’re all about …

Customer and Agent Engagement

Engagement Quotient (EQ) indicates overall health of contact center
Adopt Accessibility

★ Experiences that inspire and encourage are local

★ Employees should have a hands on approach for resolving issues

★ Relentlessly support the managers and the teams – create a micro culture
Correlate Caring

★ Engaged employees know their worth to the organization
★ They see that their success is the organization’s success and vice versa
★ Time-saving tools show your supervisors that you care about their time, you want them to have time to impart their knowledge and experience through the coaching process
Customer Engagement Now Trumps Productivity

Top Objectives for WFO Programs

- Improve the quality of customer interactions: 59% (2014), 32% (2012)
- Improve agent productivity and utilization: 44% (2014), 65% (2012)
- Improve forecast accuracy in predicting call volumes to plan employee availability: 19% (2014), 43% (2012)

Source: Aberdeen Group, May 2014, Survey of 83 Business on their Contact Center WFO Activities

Benefits Enjoyed by Best Practices WFO Users

- 5% Y-o-Y: Customer Lifetime Value
- 18% Y-o-Y: Customer Satisfaction
- 5.4% Y-o-Y: Average Handle Time
- 6% Y-o-Y: First Call Resolution
Engage Employees

★ Managing to the metric is always bad, always
★ Just because you can engage, should you
★ Focus on the outcome, not the process
Four Fundamentals of Workforce Optimization

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Engage Employees
Workforce Optimization

the past … the present … the future
Over 300 years of combined Workforce Optimization Experience

Sales, Implementation, and Support of Workforce Management, Analytics, Call Recording, Speech Analytics and more

Custom Development to your specific needs

Onsite training, best-practice consulting

Passionate about Workforce Optimization!
How to Engage your Agents

CRMXchange WFM Roundtable
Facts About Agent Engagement

13% of employees are actively engaged at work.

63% are NOT engaged and lack motivation.

24% are actively disengaged, unhappy and unproductive.

49% to 60% average agent turnover.

Can cost as much as 200% of an agent’s annual salary to replace them.

Pay NOT always the #1 loss of quality agents.

1 out of 8 agents are actively engaged to positively impact your business.
Job Engagement Brings Satisfaction

- Engaged agents are highly satisfied with their job
- Studies show that a 1 to 1 relationship between agent satisfaction (level of engagement) and customer satisfaction
- The reason is that engaged agents are the most effective ‘voice of the customer’ and by definition they strive to be the customer advocate
How WFM can impact Agent Engagement

• Traditional WFM model limits agent involvement – Break the Tradition
  – More agent involvement correlates with higher scheduling satisfaction

• Motivation is directly tied to perceived value
  – Rewards ONLY have value when there is both immediate and long term value

• Empowerment results from a perceived connection to the larger ecosystem
  – Showing and maintaining a clearly defined connection between set goals and organization goals provides clarity for the agent
It is more than just alignment of resources to identify business needs.

Scheduling is more than the sum of its parts.
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Can impact pay.

Most significant daily impact to an agent.

Scheduling is more than the sum of its parts.
Preparation is Key

• Clearly define your business requirements
  – Forecasts
  – Staffing Requirements
  – Scheduling Parameters
  – Any other Business Rule that impacts scheduling

• Communicate
  – Transparency – All roles must understand the business goals, policies, and procedures
  – Alignment – Goals, policies, and procedures must be clearly aligned with the overarching business requirements
Tie Scheduling to Agent Engagement

- **Performance Based Scheduling**
  - Clearly define how performance translates into agent scheduling options
  - Make sure agents understand the alignment of performance with business goals

- **Give the Agents the “power”**
  - Allow agents to be the master of their own destiny Automation is key
  - Provide a clear process for “one offs”
About Brian

Brian Henson brings over 20 years of experience within the contact center industry, spanning from end user to consultant. Henson currently resides as the WFM Product Manager at Calabrio, guiding products to market and interacting with business and technical users daily.

Henson entered the contact center space as an agent and quickly worked his way up to Director of Call Center Workforce Optimization Operations, gaining valuable insight into the everyday intricacies of the call center. Over the years, Henson has taken active roles including sales and consulting for contact centers, providing a unique understanding to end user issues and real solutions.

Specializing in improving the call center process, Henson delivers a dynamic perspective that focuses across workforce management, quality management, call recording, and analytics platforms.

Brian Henson
WFM Product Manager
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INTELLIGENT AGENT EMPOWERMENT

Delivering on the Promise of Work-Life Balance For Contact Center Agents

Larry Schwartz
WorkFlex Solutions
July 2015
Companies with High or Improving Customer Satisfaction Scores Outperform the S&P500

Delivering on the Promise of Work-Life Balance through Mobile Self-Scheduling
The Impact of Agent Satisfaction on CSAT

Customer Satisfaction

Agent Satisfaction

“If we can drive Agent Satisfaction (which we can), then we can drive positive improvements in Customer Satisfaction, Agent Turnover & Absenteeism.” - Jeff Rumburg, Co-Founder

Delivering on the Promise of Work-Life Balance through Mobile Self-Scheduling
The Impact of Agent Satisfaction on Turnover

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Delivering on the Promise of Work-Life Balance through Mobile Self-Scheduling
Agent Satisfaction Drivers – Millennials

Most Millennials consider **WHERE** they work and **WHEN** they work as more important than opportunities for more pay or advancement.

Millennials want an employer where work output is valued more than the time put in.

58% of Millennials don’t expect to stay in their job more than 3 years.

Millennials view work as a **THING** as opposed to a **PLACE**.

3 out of 4 Millennials say that work-life balance is a primary driver of their career choices.

Source: U.S. Chamber of Commerce Millennial Generation Research
Key Sources of Agent Frustration

- HIGH STRESS WORK ENVIRONMENT
- HIGH CALL VOLUME
- LACK OF COACHING
- SLOW CHANGE REQUEST APPROVAL
- SHORT SHIFTED (VTO)
- MISSED OVERTIME OPPORTUNITIES
- LOUSY HOURS
- MANDATORY OVERTIME
- SCHEDULING CONFUSION
- SUPERVISOR SCHEDULING SUBJECTIVITY
- SALARY

Source: BPO Exit Interviews
Flexible Scheduling Reduces Stress

Reducing Stress Improves Performance

Source: Far East Journal of Psychology and Business
So What is Scheduling Empowerment?

To Agents,
“True Scheduling Empowerment” Means Four Key Things

Think of this as a check list for success
#1 – Access to schedule anywhere/anytime

The preferred Internet access point for today’s millennial generation agent is the mobile app, not a browser window.

A native Apple/Android Mobile App provides single-icon-click access
#2 Control over **how** to be reached

People have preferred ways to be contacted when they are not at work (e.g., SMS, email, voice call, social media).

Enabling agents to predefine their preferred contact method(s) dramatically increases “communication success rate.”
#3 Control over when to be reached

Agents do not like receiving “spam” notifications, but appreciate getting notified of opportunities that aligned with their interests.

Enabling agents to pre-identify high-interest extra-hour or time-off slots can help eliminate the “spam” effect.
#4 Add, reduce or change hours with pre-approval visibility

Simply providing agents with an “front-end UI” that allows them to request schedule changes is not sufficient.

Showing your agents what time slots can be instantly approved before they make the request eliminates “approval delay stress” and administrative overhead.
Agent Scheduling Empowerment Checklist

- Access to schedule anywhere/anytime
- Control over how to be reached
- Control over when to be reached
- Adjust hours with pre-approval visibility
Scheduling Empowerment - Agent Sat Impact

Source: Aggregate Agent Satisfaction Surveys

Agent Scheduling Empowerment Sample Survey Questions

- How easy is it to trade your schedule with other agents?
- How easy is it to rearrange your schedule by taking time off and making it up at another time?
- How easy is it to view your schedule?
- How easy is it for you to determine when Time Off or Extra Hour opportunities are available?
- How easy is it for you to modify your schedule?
Scheduling Empowerment - Staffing Impact

- Contacts Forecasted: 22506
- Actual Contacts: 24036
- FTE Scheduled: 120
- FTE Required: 148

Before Agent Scheduling Empowerment

Source: Sutherland Case Study Presentation – SWPP 2015 Annual Conference
Scheduling Empowerment – Net Staffing Impact

- Contacts Forecasted: 22506 Actual
- Actual Contacts: 24036
- Contacts Handled: 23335
- FTE Originally Scheduled: 120
- FTE Required: 148
- FTE Revised Scheduled: 133

After Agent Scheduling Empowerment

Source: Sutherland Case Study Presentation – SWPP 2015 Annual Conference
WorkFlex Intelligent Agent Mobile App

Delivering on the Promise of Work-Life Balance through Mobile Self-Scheduling
True Agent Scheduling Empowerment

What Your Agents Get:
- Anywhere/Anytime access through a true mobile app
- Control over how and when they are contacted
- Real-time alerting of personalized high interest opportunities
- Flexibility to change schedule with pre-approval visibility & instant confirmation

What Your Business Gets
- Fewer schedule change requests to manually analyze/approve
- Fewer intraday staffing variances to deal with, since each agent-initiated change actually help optimize staffing levels
- Reduced agent absenteeism, attrition & perceptions of bias
- Higher customer satisfaction

Delivering on the Promise of Work-Life Balance through Mobile Self-Scheduling
About WorkFlex Solutions

- WorkFlex Solutions LLC is the Industry Leader in Intelligent Empowerment Technology for contact centers.

- Our Technology enables contact center positions to become a top choice for flexible employment and work/life balance and enable contact center employers to benefit from improved performance, reduced operational overhead, attrition and absenteeism.

- Our award winning products have been deployed across multiple industry segments including healthcare, financial services, communications, government, cable/sat and Business Process Outsourcing (BPO).
Additional Resources

**MetricNet™**
Agent Job Satisfaction Performance Benchmarking article
http://workflexsolutions.com/fs

**Workforce Management Magazine**
5 next-gen strategies for driving Gen-Y agent satisfaction

**Sutherland Global Services - Case Study**
Work-at-Home Success with Intelligent Agile Scheduling
http://workflexsolutions.com/resources/case-studies

To Schedule a WorkFlex Product Demo – email us
info@workflexsolutions.com

Delivering on the Promise of Work-Life Balance through Mobile Self-Scheduling
To Learn More About Intelligent Empowerment

WORK-LIFE BALANCE EMPOWERMENT
Mobile App Schedule Access
Personalized Communication
Schedule Change Control

TEAM EFFECTIVENESS EMPOWERMENT
Mobile-Tablet Dashboard
Real-Time Communication
Intraday VTO/OT Control

STAFFING AGILITY EMPOWERMENT
Automated Intraday Analysis
Optimized Agent Selection
Automated WFM Updating

visit our website at www.workflexsolutions.com
Enterprise Workforce Management Considerations

Stepping outside departmental boundaries

Rajeev Venkat

July 2015
Customer Engagement Optimization

OMNICHANNEL ENGAGEMENT ACROSS THE ENTERPRISE

- Social
- Mobile
- Web Self-Service
- Email & Chat
- Phone
- Back Office
- Branch/Store
- Field Services

Enrich Interactions

RISK REDUCTION

CUSTOMER LOYALTY

OPERATIONAL EFFICIENCY

REVENUE ENHANCEMENT

Optimize the Workforce

Improve Processes

Actionable Intelligence™

- REVENUE ENHANCEMENT
- CUSTOMER LOYALTY
- OPERATIONAL EFFICIENCY
- RISK REDUCTION

Customer Engagement Optimization

OMNICHANNEL ENGAGEMENT ACROSS THE ENTERPRISE

Social Media

Mobile Devices

Web Self-Service

Email & Chat

Phone

Back Office

Branch/Store

Field Services

Optimize the Workforce

Improve Processes

Actionable Intelligence™
IBM coined the term “adaptive or agile workforce” to describe a workforce that can swiftly adapt to changing conditions.

In practical terms, an agile workforce means that employees “cross” departmental boundaries when necessary to perform other kinds of work.
Agile Workforce Conceptually

Contact Center
- Calls
- eMails
- Chats

Back-office Operations
- Cases
- Faxes
- Mail

Branch
- Walk-Ins
- Returns
- Interactions
Enterprise Operational Excellence Challenges

Customer Touch Points: Multiple, Independent and Operational Siloes

Work: Different Forms and Characteristics

Limited, To No Visibility

Customers

Contact Center

Back Office

Branch

Work

People

Processes
Required: An Enterprise-Class Solution

Holistic Visibility and manageability across all three areas for actionable decisions

### The Work
- Immediate – Deferred – Multistep
- Highly Variable Work
- Unit Length
- Different Expected Value
- Service Level/Cycle Time Goal

### The People
- Multiple Skills
- Proficiencies Within Skill
- Availability and Location
- Work Preferences

### The Processes
- Appropriate?
- Optimized?
- Executed by staff as expected?
- Real-Time Notifications
Agile Workforce at Community Bank

**Before**
- Banking operations in a defined “greater Metro” area with about 50 branches.
- Management becomes aware of excess capacity at branches owing to changes in transaction channels.
- Contact center struggling to achieve consistent service levels.

**After**
- Created “Flexible” Workforce team for branches – dispatched to cover PTO and traffic anomalies.
- Created “Variable” Workforce team – shares work at branches and contact center.
- Achieved sharp improvements in ASA (to 20 seconds from 240) Abandonment and labor expense with improvement in Customer Satisfaction
Agile Workforce at an Insurance Company

Before
- Back Office Operations and Customer Management Operations (Contact Center) each impact the Customer Experience but run as independent business silos
- The outcomes of interactions and processes in each silo drove work into the other
- Overtime requirements to meet workload variations increasing

After
- Desired End-State: Single view into the customer service delivery chain.
- Leverage combined capacity to solve processing and overtime issues.
- Implement a single platform addressing quality and performance across the two functional groups.
- Cross-train a subset of employees in both functional groups
Enterprise Workforce Management

Visibility and Unified Manageability Across Customer Touch Points and Media

- Work
- People
- Processes

Forecasting
Service Level Goals
Scheduling
Intraday Management
Adherence
Performance Management
Desktop Process Analytics
Thank You
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