

# A Common Sense Approach to Intelligent Workforce Management



## CONTENTS

Executive summary .....	1
Has your ability to manage your contact center reached its limits? .....	2
Workforce management: An art or a science? .....	4
A sound methodology for workforce management .....	4
All workforce management software is not the same .....	4
Predict success, not failure .....	7
Leverage existing technology whenever possible .....	8
It's only a solution if you use it .....	8
The “perfect” workforce management toolkit .....	9
Preparing for more complexity on the horizon .....	10
Summary .....	10



## EXECUTIVE SUMMARY

No one knows better than today's call center and contact center managers how their work has increased in complexity. They must beat the competition by delivering the highest-quality customer satisfaction while still keeping operating costs down. And since the bulk of their operating costs relate to staffing, effectively managing human resources is key to their success. Managing staff is no easy task, however, with customers now demanding round-the-clock service and new ways to contact companies, such as e-mail and the Web.

More and more managers—no matter how skilled and experienced—find it overwhelming to keep up with the tasks of staff scheduling and training plus volume forecasting and performance tracking. The manual systems and spreadsheets they once used to keep ahead of the game now bury them in administrative work. Tools that once helped to lower costs or increase staffing efficiencies have become virtually useless. To succeed in today's faster-paced contact center environments, managers are turning to automated tools, such as workforce management software, to simplify their work and enable them to deliver world-class customer service, regardless of staffing and contact-volume fluctuations.

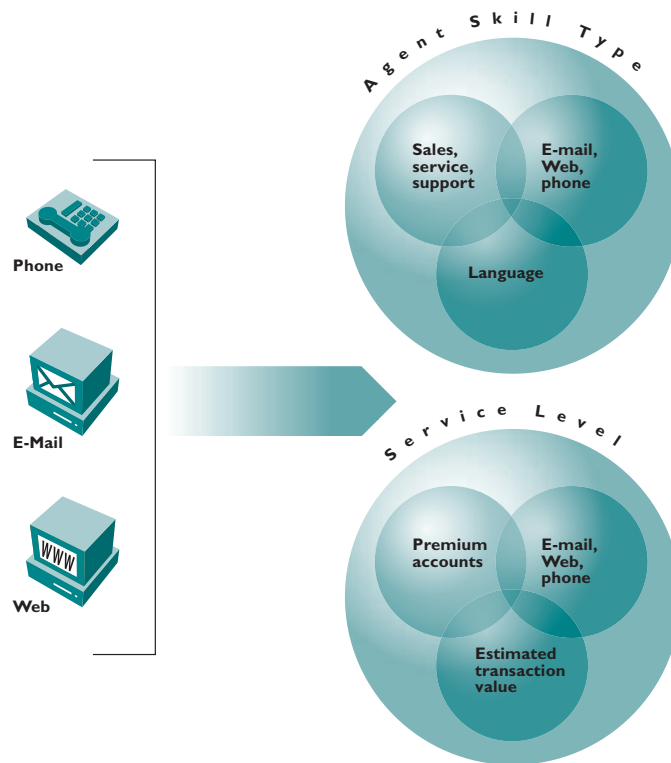
This white paper analyzes the role of workforce management and the functionality of current workforce management software in addressing daily contact center management tasks. It also provides tips for building a common-sense workforce management methodology, one that will point managers to the right software functionality and the tools they need for their unique environment.

## Has your ability to manage your contact center reached its limits?

Just a few years ago, call center managers only had to balance agents with incoming calls and juggle the fluctuating call volumes throughout the day. Goals were fairly simple: Keep the time customers have to wait to an acceptable minimum and make sure agents are comfortably busy. But demands and goals have changed dramatically. Today, companies give greater importance to call centers within their organizations because call centers provide a competitive edge. In fact, they're now widely recognized as a company's front line in developing effective customer relationships.

Call centers themselves are being transformed by escalating customer demands and the technologies designed to meet them. Call centers are evolving into contact centers because customers prefer to contact companies for information and support by fax, e-mail, and the Web—not just by telephone. And since customers want service and information anytime, regardless of where they are, contact center operations are also being challenged by the complexities of operating 24 hours a day, 7 days a week. As a result, contact centers need agents who not only have strong interpersonal phone skills, but can also support customers using the newer communication channels, such as e-mail and the Web, and agents who have broad expertise and language abilities.

Demands on call center managers have also increased. Now managers must consider more complex workloads, predict more accurately the peaks and valleys of contact volumes, and manage human resources in a fast-paced high-tech environment. This involves categorizing incoming contacts by customer type and type of request; giving preference and higher levels of service to premium customers; and routing contacts to the agents who can provide the best service possible. To add to this already complex set of new challenges, managers must also continue to cut costs while increasing revenues, since contact center budgets remain conservative even as demands on center operations multiply in volume and intricacy.



*With the increasing complexity of today's contact centers, center managers must juggle agent skills and preferences with increased service levels and staffing demands across multiple communication channels.*

There is a bottom line, however. Just as it has become impossible to fully serve customers without a contact center that can route and respond to sales, service, and support queries, it has become impossible to staff and manage the center without automated workforce management software. And it has become unthinkable to try to manage the center's complex operations with conventional manual methods, such as spreadsheets. As a result, companies have begun to arm their contact centers with powerful new workforce management technology. This paper discusses the fundamentals that contact center managers must consider in order to select the right workforce management technology to manage their staff.

***“The complexity of contact center scheduling and forecasting is increasing due to growth in the use of e-mail and Web-based interaction methods, increased specialization of agent skill sets and continued deployment of multi-site contact centers.”***

*Agent Performance Optimization Software Markets Report  
Frost & Sullivan*

## Workforce management: An art or a science?

Better than anyone, contact center managers know that most of their decisions involve a mix of human resource skills and technical expertise. They must hire, train, and retain their staff and schedule them in ways that are appropriate to center requirements, yet also take into account employee preferences. Center managers also know that simply throwing technology at human resource issues doesn't magically—and unerringly—address these challenges. It's true that managers need workforce management software to quickly perform tasks like calculating available staff, predicting customer contact volumes, creating schedules, and making ongoing schedule adjustments. But if the software can't take into consideration the human elements as well, it is software that is designed to fail. Managers must be able to factor in human concerns, like the nature and type of customer demands and individual agent preferences and availability, not to mention employee skills, training paths, and additional job responsibilities.

Clearly, managing a contact center workforce is both an art and a science. The same people who rely on human resource skills to manage their employees must also understand, select, and maintain the technical tools that are the backbone of their center. These managers must determine what technology can and cannot deliver, and then choose the right workforce management software solution for their particular contact center environment.

## A sound methodology for workforce management

To find a solution that covers all the needs of their contact centers, managers develop judicious rules, procedures, and practices. In developing a management methodology that covers the best ways to service their customers, managers must consider the desired customer service levels, hours of operation, escalation procedures, and ways agents can access customer information. They must also create a system for training and managing their agents.

When contact center managers turn to technology to enhance their methods and systems and keep their operations profitable, they need to keep four principles in mind:

- All workforce management software is not the same.
- Effective managers don't predict failure—they plan for success.
- Cost-conscious centers leverage existing technology whenever possible.
- It's only the right solution if you use it.

Let's examine each of these principles in detail.

### **All workforce management software is not the same**

Many of the workforce management software offerings on the market today appear, superficially at least, to offer similar functionality. They provide basic automation of three critical tasks: forecasting, scheduling, and tracking (daily operation management). Contact center managers must have help in forecasting customer contacts and scheduling agents to meet demand. And they must be able to track center activity and understand volumes and trends. But they cannot adequately perform any of these tasks today without the right management tools.

However, the available solutions have fundamental differences. Manual systems usually involve entering data into and maintaining elaborate spreadsheets that use a simple factor for calculating forecasts. Managers using these manual systems have to set up another spreadsheet to create their schedules. Some workforce management software solutions do little more than automate this process. Good workforce management software, however, offers much more than glorified spreadsheet functionality. A truly robust solution should deliver a complete, scalable toolkit that can integrate with the existing systems and technology infrastructure.

All current software solutions offer the ability to perform point-to-point forecasting, factoring in past history and applying some weighted calculations, but in many situations it is important to factor in trends and/or historical patterns as well, so managers need a tool that can do both. Yet most workforce management software solutions offer only the basic cycle of forecasting contacts, profiling agents by their abilities and preferences, and scheduling. Some solutions also add limited reporting capabilities to this basic cycle. However, the ideal workforce management software takes the contact center manager's understanding of staffing complexities very seriously and provides sophisticated, flexible management tools the manager's unique and complex environment demands.

Software with more refined and flexible tools can create schedules based on agent abilities and preferences, business requirements, or a mix of the two that the manager can control. The best choice in workforce management software lets contact center managers choose which tools to use first and which to implement later. With a complete range of workforce management tools, contact centers can grow with the demands of their enterprise. In addition, good workforce management software will run on an open architecture, so it can integrate with other technology the company is using. It will support any type of platform and integrate with other necessary staffing-related applications managers use, such as software for monitoring quality, handling human resource issues, and providing online learning (eLearning).



The perfect workforce management software will allow agents, supervisors, and managers to interact, changing their plans and their schedules anytime, from anyplace, to match real-life circumstances. In short, the better software includes tools that free managers to use their own knowledge and understanding of their contact center. These richer tools empower agents and their supervisors, thus enabling the managers to increase efficiencies in their contact centers and reduce costs. These richer tools also ensure that a manager gets accurate reports that identify precisely what is going on in the center with all agents and all contact channels at any given moment. This way the manager can accurately predict what is going to happen and when—and revise schedules as needed. When an agent calls in sick, these more robust tools provide a complete closed-loop approach to managing operations and let managers garner every extra bit of efficiency for maximum reduction in costs. Scenario 1 describes how this works.

## Scenario 1

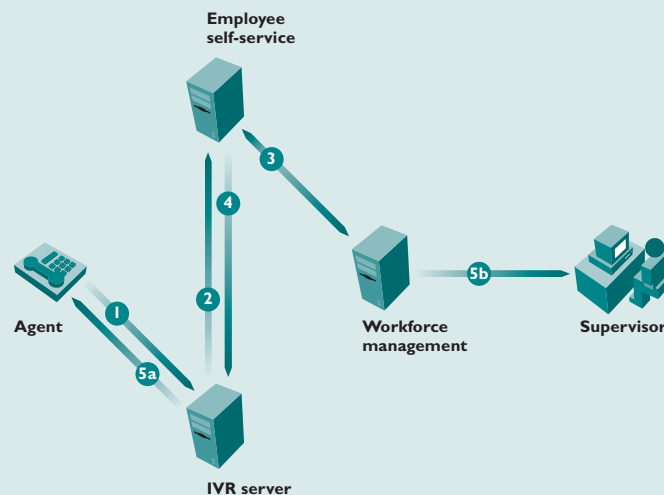
An agent calls in sick from home. Rather than having to track down and talk to his supervisor about his pending absence, he is able to report his schedule exception via the phone to an employee self-service system. The system empowers the agent to manage and make changes to his own schedule and frees his supervisor from the associated administrative schedule-change tasks. Once the agent's request is completed, his supervisor is automatically notified and can check the workforce management performance reports to determine whether the sick call jeopardizes the center's schedule for the rest of the day.

Seeing that there will be one hour when the center will be understaffed, the manager could then use a workforce management tool to cancel a meeting and match staffing to contact volume again. With the right workforce management

software, this entire process can be accomplished in two or three minutes.

If several people were to call in sick, the manager could take proactive steps to immediately determine the optimal way to reschedule to meet required service levels throughout the day, perhaps by canceling a group meeting or shifting a training session to another time.

With the right software, no manual notification is ever necessary—managers can increase efficiencies and easily take advantage of new technologies through interlinked IVR employee self-service, and notification of these changes to desktop pagers. Managers can even integrate e-mail and wireless devices for unbroken team communication anywhere, anytime. And again, this entire process would take just two or three minutes with the right workforce management software.



**Predict success, not failure**

Contact center managers need to know how to achieve their goals, not just learn where those goals break down. This means carefully researching the limits of the workforce management solutions available today. For example, software that allows managers to forecast only overflows between groups isn't adequate. Managers need software that can be precise—so they can forecast to an exact number of contacts with the right amount of resources. This way they can meet demand and satisfy customers efficiently and cost-effectively.

A manager who tries to avoid a backlog by forecasting long-term turnaround times—for a contact channel like e-mail, for example, that has the potential to slow down response times—is planning for a slow response. Instead, managers should be proactive. They need software that doesn't maintain a backlog, but lets them take the backlog into account to forecast quick turnaround for those channels, so they respond to all contacts as efficiently as possible. Scenario 2 illustrates this.

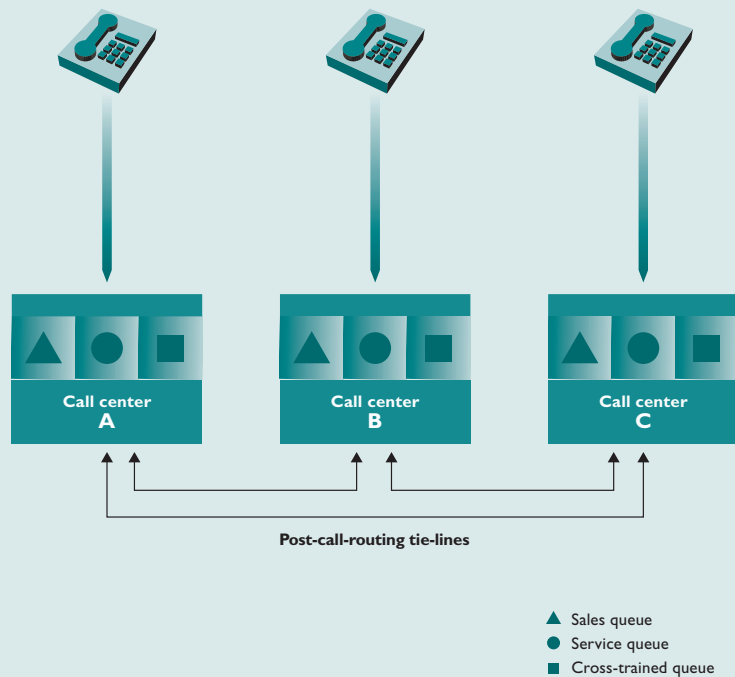
**Scenario 2**

In a hypothetical company with two call centers, calls flow directly into each center and do not go through a call-routing network. In emergency situations, one center typically gets the overflow from the other.

Traditionally, this company uses expensive tie-lines that allow for these emergency overflows. Since the manager is planning for overflow contingencies because the

tie-lines exist, the tie-lines are used. So planning for overflows does fix the problem, but it's a very expensive solution.

Instead, if the manager planned to minimize overflows by using tools that allow prerouting decisions and real-time schedule adjustment in both centers, the manager could meet contact volumes without using an expensive emergency solution.



**Leverage existing technology whenever possible**

Very few contact center managers have the luxury of building their center from the ground up, selecting all the latest hardware and software and hiring a completely new, fully trained staff to work them. Most managers, because of real-world budget concerns, must add new technology to existing systems. For this reason, managers should select workforce management software that leverages the systems and technology they already have. Not only is this cost-effective, it extends workforce management information and capabilities throughout the contact center. But let buyers beware: Not all workforce management software can easily leverage existing technology, so managers must choose wisely. Otherwise, they will find that vital data elsewhere in their enterprise is isolated—what is frequently referred to as siloed or stovepiped—and can't be integrated into their contact center decision-making.

For example, to ensure quality service and training measurements, contact centers routinely use quality-monitoring software to record agent interactions with customers. Since workforce management software maintains agent schedule information, managers should select workforce management software that can easily integrate with quality-monitoring software and other monitoring and training applications. This way, managers can further automate critical operations and gain even greater efficiencies in their contact centers.

**It's only a solution if you use it**

Workforce management software is first and foremost a management tool that allows managers to handle staffing operations efficiently, but it yields successful results only if it is actually used. Not entering critical staffing changes and updates into the software on an ongoing basis seriously compromises its usefulness. Managers should not be fooled by claims that dedication to entering these types of changes and updates is unnecessarily elaborate or is unimportant. As the computer maxim says, "Garbage in, garbage out." It is critical to dedicate the necessary administrative resources to enter exceptions and track net and actual demand.

Robust workforce management software tracks changes and maintains real-time accurate staffing information, so managers can quickly compare forecasts to actual center performance throughout the day and make adjustments as needed.

For example, schedule exceptions, such as when agents call in sick, need to be entered into the software so that managers know what impact, if any, these changes will have on center performance throughout the day. In addition, supervisors and managers need to monitor these staffing updates and changes so they are prepared to take corrective action when necessary. Thus, managers can continuously improve center efficiency, receive a higher return on investments, and increase staffing and employee satisfaction.

## The “perfect” workforce management toolkit

Most contact center managers’ ideal set of tools would be very similar. First and foremost the tools should help reduce the complexity of the contact center’s staffing operations and be flexible enough to address a contact center’s unique environment. Software that is too simplistic would be seriously inadequate.

Near the top of the list of necessary tools would be the ability to forecast contact volumes—from all incoming contact channels—based on seasonal patterns, trends, holiday variations, and historical patterns. The ideal forecasting tool should be able to combine accurate current data with short-term and long-term (up to many months) samples of historical data, for the most accurate forecast possible. Managers should also be able to create forecasts in dynamic environments—such as contact centers focused on sales or promotions—in which not much contact-volume history has been established.

Another indispensable workforce management tool would be flexible scheduling. Extremely flexible scheduling allows a manager to factor in all the variables—the center’s shift requirements, the agent’s preferences and abilities, or even a combination of the two—and to create schedules accordingly. This type of flexible software can take into account the center’s service requirements, while at the same time providing the ability to reward senior or high-performing agents. The software should be able to schedule in multiskill environments and across multiple center locations over short and long periods of time.

The ideal workforce management solution would also provide contact center managers with a 360-degree view of center operations. This complete view comes from:

- access to real-time and historical performance information
- reports that incorporate enterprisewide historical analysis
- the ability to perform “What if?” scenarios as needed
- short- and long-term budgeting capabilities

With this 360-degree view, managers can track all the numbers and statistics in their center throughout the day, compare them with forecasts and projections, then take corrective actions, if needed, as well as plan for future growth. Having the full picture will help them constantly improve response times even as they cut costs.

## Preparing for more complexity on the horizon

As companies add more channels and agents to their contact centers, workforce managers reach the point where, no matter how sophisticated their tools, entering staffing exceptions, changes, and details becomes too cumbersome—and requires so much overhead to manage, that the tools begin to provide diminishing returns. At this point, managers need a workforce management solution that can easily integrate with other key contact center applications, such as contact routing systems, and automate key workforce management tasks. Through such integration and automation, managers can realize greater efficiencies and improve schedule adherence.

Companies must therefore choose solutions that integrate with each other as well as automate as much of the rote manual work as possible. By using a contact routing system or contact server, managers can automate schedule exception entries—instead of having the changes entered manually, which often takes a low priority. Automation of this task ensures that critical staffing data is considered when forecasting and scheduling. In addition, automation can further reduce costs and increase efficiencies and, frequently, suggest new ways to forecast, schedule, and track in the future.

With integration of workforce management and a contact routing system, managers can automatically monitor contact center performance throughout the day and access key workforce management information to find the necessary agents available to handle changes in volume. An integrated contact center solution could also automatically reassign these agents to meet demand.

## Summary

In conclusion, when selecting workforce management software for contact center operations, managers should remember that not all workforce management software solutions are equal. Managers must do their homework to ensure that the solution they choose will respect their understanding of the staffing issues in their centers and provide them with the flexibility to apply their knowledge to solving and managing these issues.

The leading provider of workforce management solutions—and the only provider capable of offering all of these capabilities today—is Aspect Communications. Its workforce management solution, based on TCS technology, is built upon 25 years of experience in solving the staffing challenges of more than 3,000 contact centers in 40 countries—across all industries.





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