

10 Steps to Selecting a Workforce Scheduling System: Lessons from Call Centers That Have Made Mistakes

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In the past few years, a vast majority of workforce management systems purchased by call centers have later resulted in dissatisfaction with their choices. In one case, a well known retailer abandoned three different packages over a six-year period because the programs lacked critical functions as well as the flexibility to meet the call center's needs. In another, a catalog company was prompted to switch systems because their legacy platform was unable to maintain sufficient historical call data to generate accurate forecasts.

All workforce management systems are not created equal. Most of them claim to have the same features, but the issue is how those features and functions are executed. Unfortunately, that is often difficult to determine until the application is installed, and then it's too late.

If you don't select a best-of-breed system to begin with, whether you're buying a standalone package or a so-called end-to-end solution, it may have too many limitations to deliver the results you're looking for. If the forecasting or scheduling is not sophisticated enough or if you're doing too many processes manually, you are essentially leaving money on the table by failing to staff your center properly.

Here are some questions to ask to avoid making a costly mistake when purchasing a workforce management (WFM) package.

1 – Can the system produce a single optimized schedule?

Many WFM systems generate a basic schedule, and then require analysts to spend costly time editing that schedule to accommodate breaks, lunches, meetings, training sessions and vacations. This consumes clerical time, risks input errors, and makes creating every schedule an inefficient multi-step process. It can also adversely affect your service levels by failing to consider these variables in the optimization process. Look for a system that automatically incorporates breaks, lunches and so on when producing a schedule.

2 – Does it collect enough data to produce accurate forecasts?

Many workforce scheduling systems store no more than 16 weeks of historical inbound call data to generate a forecast, and most fail to gather information on marketing campaigns, billing cycles or other variables that can affect call volume. Trying to predict future call volume without this information is like trying to balance your checkbook if you haven't recorded all of your transactions. Look for a WFM package that will maintain several years' worth of very detailed data for maximum forecast accuracy.

3 - Can the system recognize special events when forecasting call volumes?

In call centers where workloads fluctuate due to special events such as catalog drops or discount offers, the only way to ensure proper staffing is with a system that can electronically calculate anticipated call volume based on how a given event affected incoming calls in the past. In a sales environment where something like a direct mail campaign or TV advertorial triggers extra calls, this correlated forecasting capability can mean the difference between profit and loss.

4 – How long does it take to generate forecasts and schedules?

Some WFM systems may require eight to ten hours to forecast call volumes, determine staffing requirements, and produce call center schedules. Others can do the same job in minutes. It depends on how the software is architected and how the call center is set up. To determine the performance of the system you're looking at, ask the vendor to perform a simulation based on a year's worth of your own forecast data, and then time it.

5 – Can you automate tasks that must be performed repeatedly?

Setting up and disseminating call volume forecasts, agent schedules and activity reports can consume 50 to 60% of an administrator's time. You can do the work in half the time if these recurring functions can be pre-configured with shortcut wizards for one-click execution, rescheduled to run automatically, or linked in self-executing sequences. This latter feature makes it possible, for example, to generate a forecast, export it to one group of recipients, e-mail it to another group, and print copies without stopping for user input.

6 – Can the system adjust for daily 'surprises' like absences or unplanned meetings?

When unexpected agent absences, meetings and/or call volumes require current-day schedule adjustments, intra-day optimization tools make the job a lot easier. Find out if the WFM system you're evaluating can recalculate the day's staffing needs; modify breaks, lunches and work assignments electronically; and automatically alert agents by email and/or pop-up message to eliminate the need to print and distribute new schedules.

7 – Is there an integrated vacation planner, and can it adapt to your needs?

This is a twofold test. First, the vacation planning module should integrate with the WFM software to ensure that vacation slots will be accurately calculated reflected in agents' schedules without manual input, and so on. Second, it should be fully configurable to support your policies and staffing structure. Can it accommodate a Wednesday to Tuesday work week? Does it allow you to allocate vacation slots by skill set, shift type, given contact center, or across multiple call centers? Etc.

8 – Are busies and abandoned calls considered in calculating requirements?

Systems that don't understand busies and abandons will always overstaff your call center. Since staffing typically represents 70 to 80% of your operational costs, overstaffing can have a severe impact on your budget. This is like the airplane that takes off with empty seats: you will never have another chance to recover that revenue. Ask whether the software you're considering has an algorithm that incorporates busies and abandoned calls in its calculations.

9 – Is the system scalable?

Many WFM systems require call centers to perform a forklift upgrade once they grow to a certain size. This is not only an added expense but a major administrative headache. A scalable system that can accommodate growth without installing completely new software is a much better way to go.