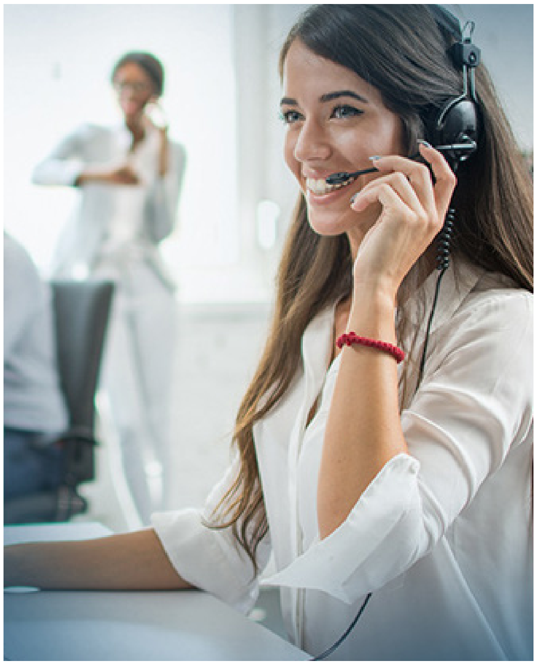
ABSTRACT

2019 - 2020 Workforce Management Product and Market Report



DMG Consulting's 12th annual ***Workforce Management Product and Market Report*** *provides the most comprehensive and insightful coverage of this evolving technology sector. The 292-page Report contains detailed vendor, product, technology, trend, price and market data to help decision-makers in contact centers, back offices and branches select a WFM solution that meets their unique needs. It examines the new features, including artificial intelligence (AI) and machine learning, being incorporated into the current generation of WFM solutions. The Report also covers best practices to position an organization for a successful implementation and to achieve a rapid ROI on a WFM investment.*

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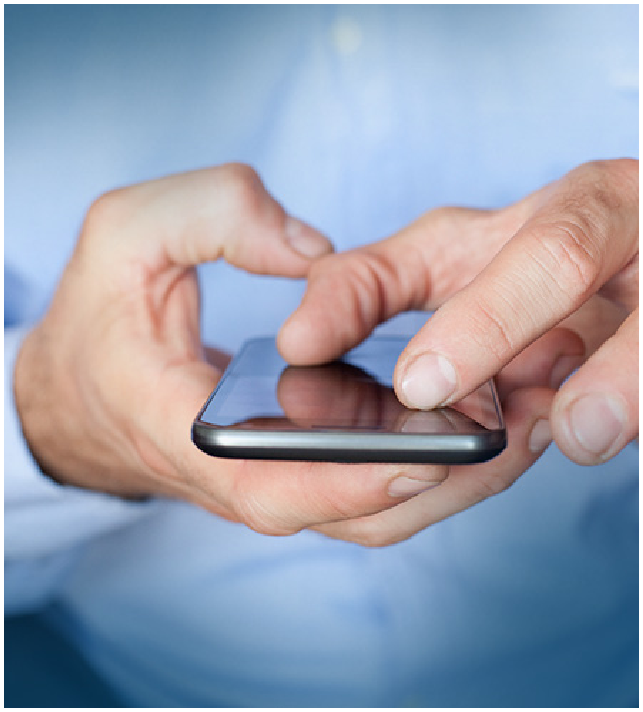


The WFM sector has undergone a dramatic transformation in the past three years. The key differences between "old school" and "new wave" WFM are flexibility, mobility, enablement, and automation. The new generation of WFM solutions gives agents unprecedented visibility into and control over their schedules. Contact centers also benefit from reduced operating costs, optimized scheduling, improved performance, decreased staff attrition, and a more engaged and committed workforce.

Leading WFM solutions have re-imagined the traditional fixed-shift staffing paradigm. Today's solutions utilize flex scheduling, which empowers agents to create their own schedule based on when they want to work. Agents can enter their availability and preferred work times into a WFM solution, or alternatively, they can build their schedule by selecting the days and hours they prefer to work from a master list of available slots.

Contact centers require optimal staffing 24x7x365. These service environments need to be able to respond rapidly to real-time conditions, especially when inevitable variances to plan occur. WFM solutions must be agile and self-adjusting in order to adapt to volatile demand and fluctuating resources, so they can bridge the gap between forecasts and reality. Adaptive real-time scheduling addresses this challenge by identifying when service level is non-conforming. It re-forecasts for the remainder of the day, determines the required skills and resources to address new projections, and performs the necessary scheduling changes to "acquire" or dismiss resources, as necessary. At the same time, agents benefit by being able to self-adjust their schedules in response to unanticipated events in their personal lives. A variety of enhanced self-service capabilities empower agents to trade shifts, swap hours, request vacation or time off.

Flex scheduling, agent self-service and adaptive real-time scheduling are the new standard for WFM. These capabilities are enabled by algorithms that produce forecasts for every type of interaction. The WFM vendors are investing in delivering new and enhanced methods to improve the accuracy of forecasts and schedules for omni-channel, multi-skill and blended environments. Many of these new algorithms leverage AI technologies and are optimized for each discrete channel.

The WFM market is performing extremely well, and DMG expects it to continue to grow at a strong rate even though it is a mature market. DMG anticipates that the WFM market will experience rapid growth over the next 5 years, increasing by 11% in 2019, by 10% in 2020 and 2021, and by 9% in both 2022 and 2023. However, it is possible that the rate of growth could be substantially higher if back-office and branch/retail implementations accelerate.

The ***2019 – 2020 Workforce Management Product and Market Report*** provides an in-depth analysis of the contact center WFM market, the competitive landscape, vendors, product suites, technology and innovation. The Report explores the business and market trends and challenges that are driving innovation. It provides an insightful analysis of how WFM is being re-engineered to meet the complex requirements of today's omni-channel, virtualized contact center environments, consumers' rising expectations and the demands of the modern workforce. This Report provides an analysis of WFM market activity as well as 5-year market projections. It also explores back-office and branch WFM market opportunities and applications.

The 2019 – 2020 edition of the ***Workforce Management Product and Market Report*** covers 6 leading vendors: Aspect, Calabrio, Genesys, NICE, Teleopti and Verint. The Report provides customer satisfaction survey results that measure and rank ratings across 16 product components, 16 effectiveness categories, and 10 vendor categories.

Key Reasons to Buy this Report

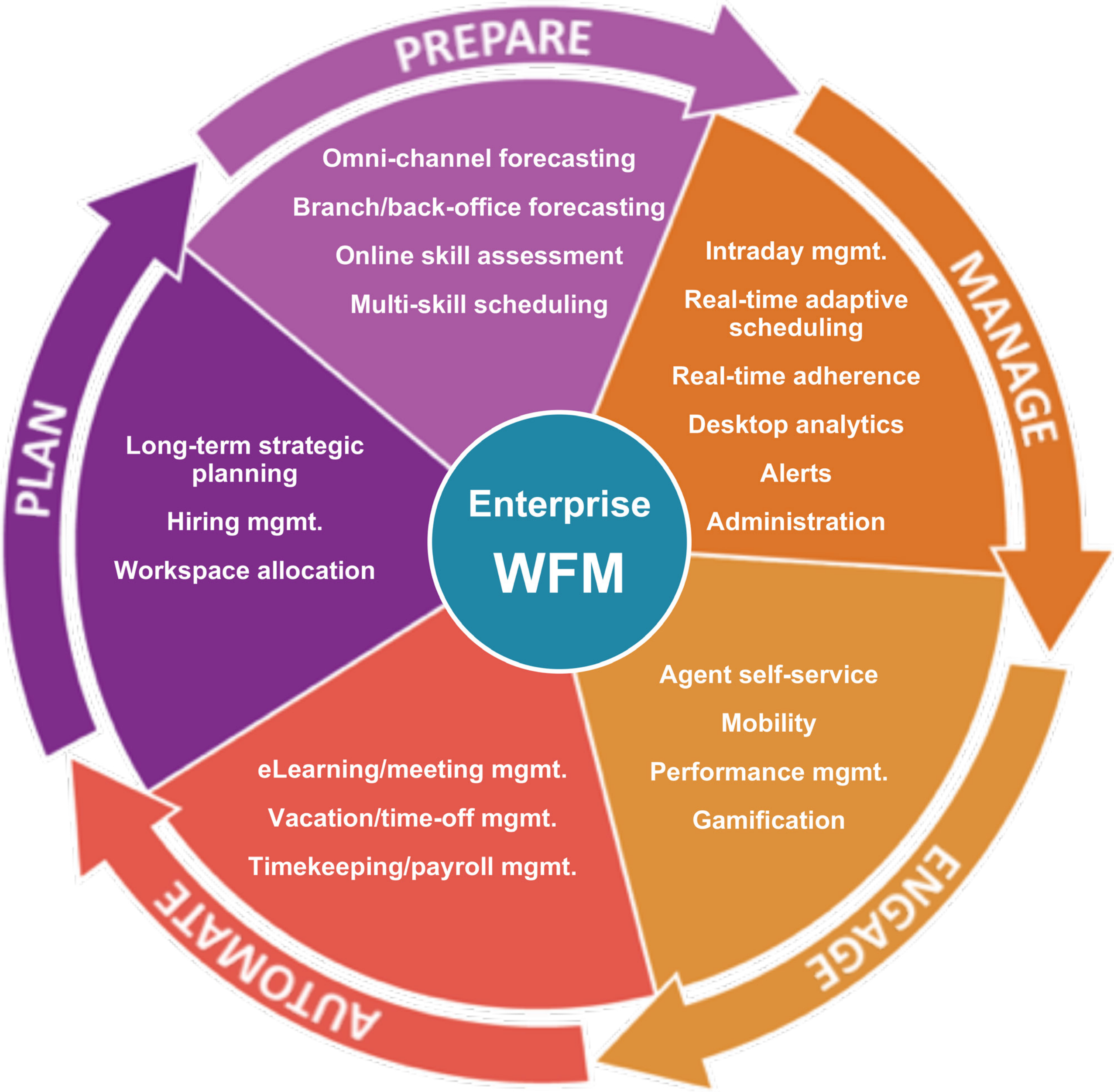
- Review of workforce management market segments and vendor-supported business activities
- Functional components that comprise contact center WFM suites
- Current market and business trends and challenges that are driving enterprise investments and influencing vendor innovation
- WFM market innovation, including a review of recently introduced functionality and what is planned for the next 12 – 18 months
- Insightful discussion of how AI-enabled technologies will be instrumental in the future of WFM
- Comprehensive analysis of the fundamental requirements of WFM solutions: forecasting, scheduling, managing, automating, engaging and planning
- A look at the latest developments in the back-office and branch capabilities included in the 6 featured WFM suites
- WFM market activity analysis, adoption rates and 5-year market growth projections
- Review and assessment of the WFM competitive landscape, including an overview of the 6 leading and contending WFM vendors, with company snapshots, their WFM suites, packaged solutions and small and mid-size business (SMB) offerings
- Implementation analysis, including vendor methodology, best practices, maintenance and support, workshops, training and professional services
- WFM benefits and return on investment (ROI) analysis
- Vendor pricing for 250-seat on-premise and cloud-based WFM implementations, including incremental costs for optional modules
- Comprehensive customer satisfaction survey results that measure and rank ratings across 16 product components, 16 effectiveness categories and 10 vendor categories
- Detailed company reports for the 6 leading and contending WFM vendors, analyzing their products, functionality and future product development plans
- Comprehensive WFM Vendor Directory

Report Highlights

- ***WFM is addressing staff demands for work-life balance:*** Flex scheduling and self-service empowerment are enabling agents to achieve control over their work hours. This is a major shift in the WFM world, a sharing of power with employees, who now have visibility into and control of their schedules.
- ***Adaptive real-time scheduling allows companies to address variances from planned activities during the workday:*** Companies require WFM solutions that are self-adjusting and able to adapt in real-time to changing conditions. Adaptive real-time scheduling automates the intraday management challenge. These solutions can identify service level nonconformance, and can reforecast and reschedule for the remainder of the day.
- ***AI is playing an increasingly influential role in the future of contact center technology:*** AI and machine learning are being leveraged to improve scheduling accuracy and fairness. They also support predictive technology to address hiring, agent churn, and to predict timely completion of work.

SAMPLE FIGURE

Enterprise WFM


PREPARE
Omni-channel forecasting
Branch/back-office forecasting
Online skill assessment
Multi-skill scheduling
MANAGE
Intraday mgmt.
Real-time adaptive scheduling
Real-time adherence
Desktop analytics
Alerts
Administration
ENGAGE
Agent self-service
Mobility
Performance mgmt.
Gamification
AUTOMATE
eLearning/meeting mgmt.
Vacation/time-off mgmt.
Timekeeping/payroll mgmt.
PLAN
Long-term strategic planning
Hiring mgmt.
Workspace allocation
Enterprise WFM

Source: DMG Consulting LLC, March 2019

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