

# Optimizing Schedules

*Creating Efficient and Balanced Work Plans*

*In Partnership With:*



**CrmXchange**

# Welcome, Let's Get Acquainted!

Where (Geographically) Are You  
Joining Us From Today?



## Who We Are

The WFM People™

**Solid Rock Consulting** is a Workforce Optimization (WFO) consulting firm founded in 2012.

We **Transform** our clients' organizations and customer experiences by ensuring they have the right resources, in the right place, at the right time!

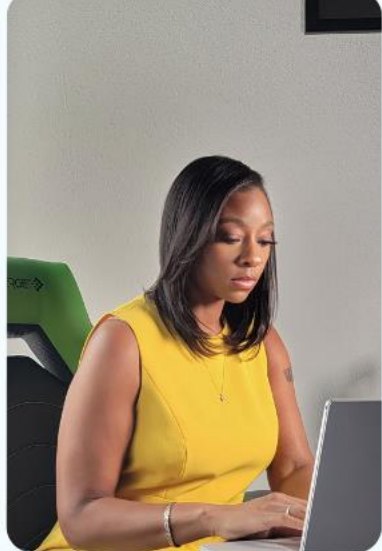
We do this through the 3 core pillars of our service:  
WFM Support, Professional Services, and Solution Procurement.

# What Will We Cover Today?

- Why **employee preferences** aren't a scheduling burden BUT a **business advantage**.
- How to build **efficient schedules** without burning out your agents.
- The **top mistakes** most leaders make when trying to optimize schedules (and how to avoid them!)







# Juanita Coley

SOLIDROCK CONSULTING, CEO  
THE CONTACT CENTER WHISPERER  
**Author of “WFM Go Beyond”**

Recognized industry leader & award winner:

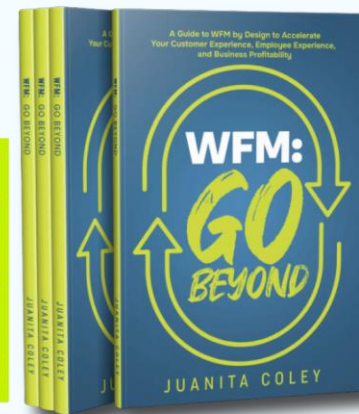
- Mrs. Corporate America 2022
- 2022 Most Influential Tech Advisor
- 2022 Top 25 Thought Leader

Over 20 years of expertise in WFM, driving efficiencies for brands like:

- United HealthCare
- Optum
- Walgreens
- Liberty Medical

Consulted for top WFM providers, including Verint and Aspect. Global presence—leading a team of consultants across the US, Canada, and EMEA.

**SOLID ROCK**  
CONSULTING



# Let's Play A Game!

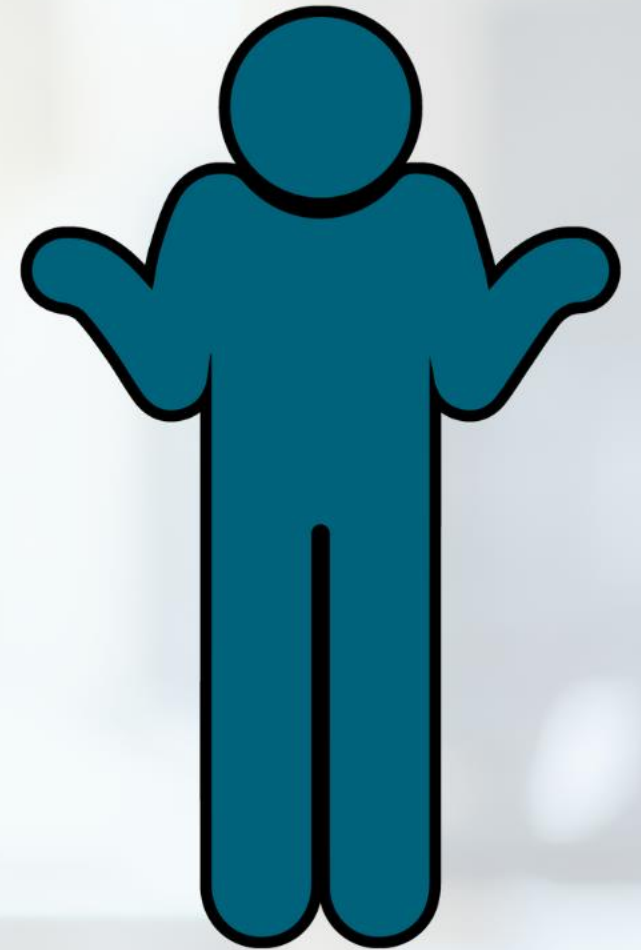
With ONE word...

What's the BIGGEST  
challenge you face with  
scheduling today?

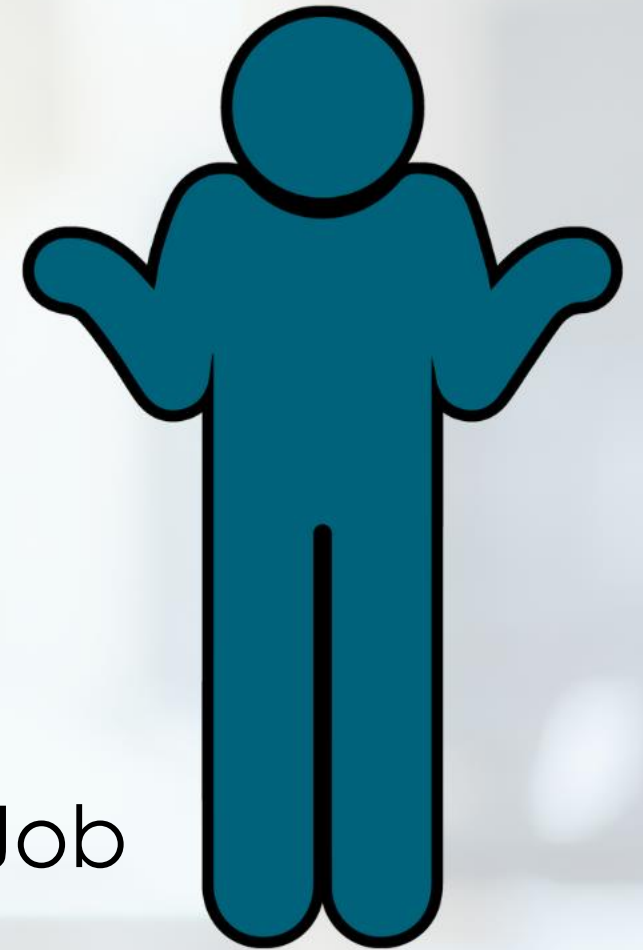




# Schedule Flexibility



# Schedule Flexibility



Was the **#1** Reason People Left Their Job

# Let's Talk About The Real Problems...

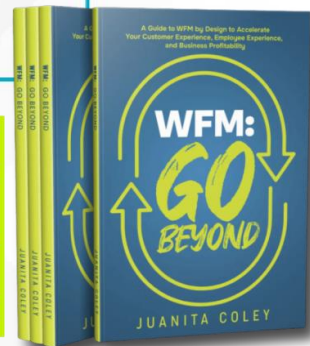
👁️ It's *not* that employees want too much...

It's that we're treating **preferences like perks**, instead of seeing them as a **data advantage**.



## The 3 Real Issues behind Schedule Preference Pushback:

- **Lack of Visibility** ( Most orgs just don't have a real way to collect and manage preferences at scale )
- **One-Size-Fits-All Mentality:**  
**Fixed shifts and legacy thinking keep us from exploring flexible models that still meet demand.**
- **Misaligned Metrics:**  
**We prioritize coverage and ignore** *how burnout, attrition, and low engagement silently kill performance.*





# 3 Pillars That Build A Bridge To Efficient Scheduling



The **top 3 mistakes** most leaders make when trying to build & optimize schedules!



# #1 – Built for AHT goals, Not from Reality:

## 🚩 What This Looks Like:

- Scheduling templates built around target AHT instead of actual behaviors
- Ignoring variance caused by **complexity**, **customer mood**, or **channel mix**
- Assuming every agent handles contacts at the same pace

## ✅ What to do instead:

- Use AHT as a guide, not gospel
- Incorporate **task types**, **wrap time**, **shrinkage patterns**, and **seasonal behavior**
- Start with the **real story behind your data**—not just the SLA target

# #2 – Coverage Only Scheduling

## 🚩 What This Looks Like:

- Rigid, **fixed shifts** created solely to meet Hours of Operation (HOOPs)
- No flexibility for life events, personal preferences, or peak vs. low demand shifts
- Agents locked into 5x8s when split shifts, 4x10s, or rotating options might serve *everyone* better

## ✅ What to do instead:

- **Design shifts that do BOTH:**
- Modular shift blocks (e.g., 4/3 splits, double-ups, partial day options)
- Dynamic staffing based on **interval-level demand**, not just open hours
- Tools that allow agents to **bid, swap, or select** based on availability + business need



# #3 – The Delegation Trap!

## 🚩 What This Looks Like:

- Schedulers or ops leads are **managing schedules reactively** without leadership involvement
- No ongoing review of **schedule effectiveness** or **alignment with KPIs**
- Scheduling is treated like an admin task—not a business-critical function

## ✅ What to do instead:

- Keep **WFM strategy** connected to **leadership outcomes**—CX, EX, and profitability
- **Schedule reviews** should be part of **business ops meetings**, not buried in WFM corners
- Use metrics like **adherence, shrinkage, agent satisfaction, and schedule match rates** to optimize continuously

# Key Takeaways To Remember:

## **Employee Preferences = Business Advantage**

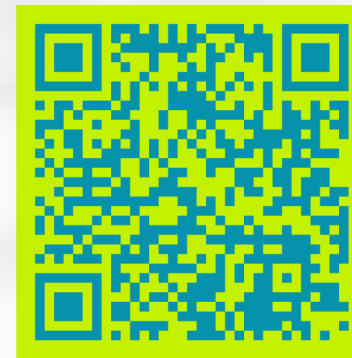
- Use them as data, not distractions.

## **Efficiency Doesn't Mean Burnout**

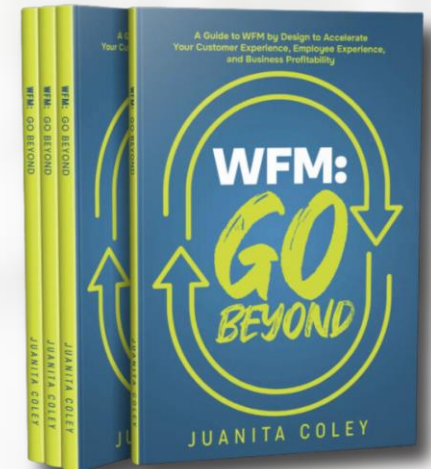
- Build schedules that work *with* your people, not against them.

## **Avoid the Top Mistakes**

- Don't optimize for coverage alone.
- Don't design from outdated assumptions.
- And *don't leave scheduling out of the strategy conversation.*



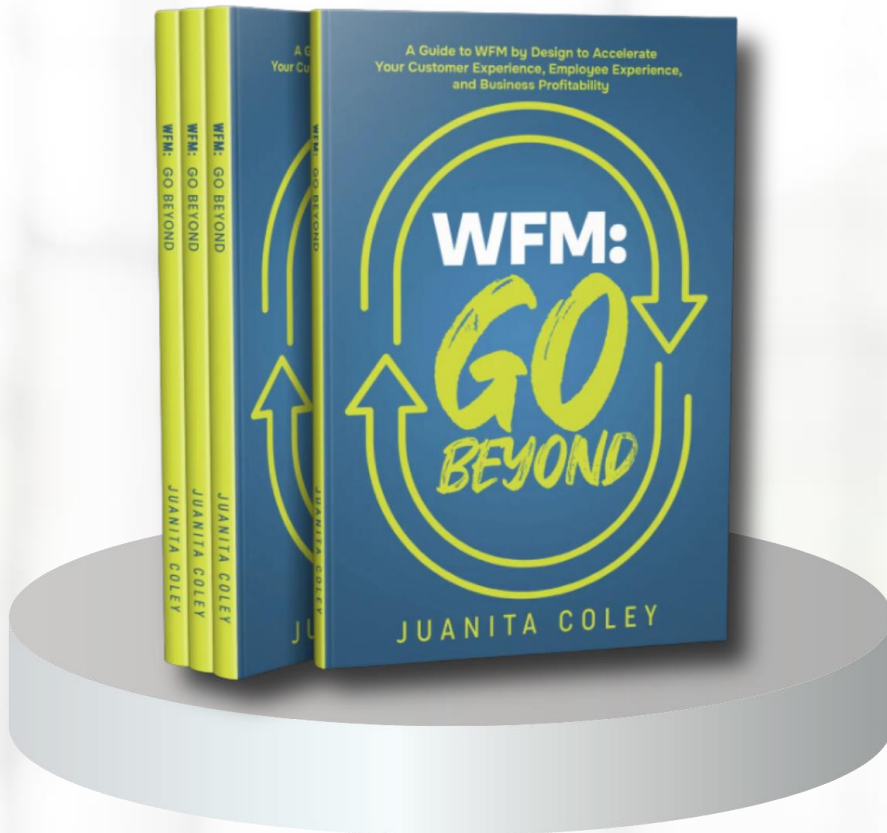
**WFM: GO BEYOND**



# Your Free Gift For Attending LIVE!

 **LIVE ATTENDEES ONLY!**

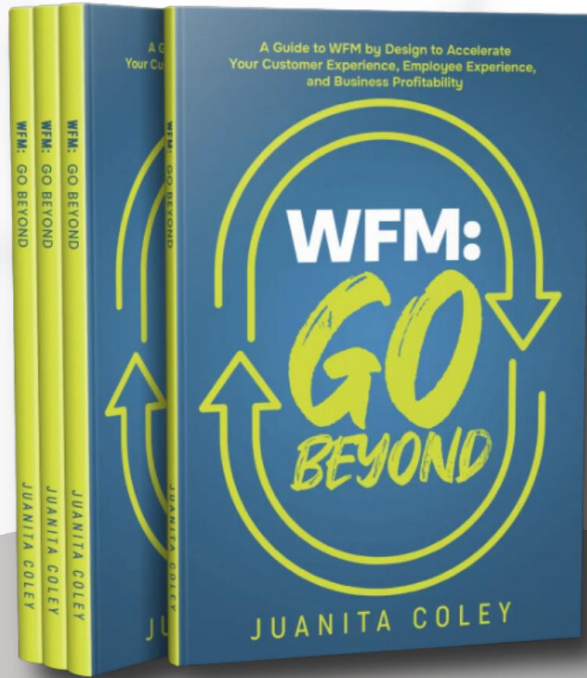
 **WFM: Go Beyond Book** (Physical or Digital Copy) – **Valued at: \$29.99**



**WFM: GO BEYOND**

**\*Must Be Ordered or Downloaded by 2:00PM Today!**

# ★ 24 Hour Upgrade BONUSES You'll See on the Next Page *(Live Attendee Exclusive)*:



📖 Accompanying **WFM Go Beyond Workbook**  
**Valued at - \$25** (Your Offer \$15)

📊 **Customer & Contact Ratio Template + Training**  
**Valued at - \$2,000** (Your Offer \$49.99)

🎓 The **WFM Fundamentals Course** - \$1,250  
**Valued at - \$1,250** (Your Offer \$299)

👥 Access to the **Private Go Beyond Community**  
**Valued at - \$13,000** (Your Offer FREE)

★ **Total Value:**  
**\$16,000+**





# Thank You For Joining Us!

💡 **WFM is no longer a support function — it's a leadership advantage.**  
Let's lead with strategy, not spreadsheets.

## Next Step:

Grab your *WFM: Go Beyond* LIVE Bonus Bundle now AND book a Cinareo Demo TODAY!

👁️ **More Questions? Want to work together?**  
Visit Us Online: [solidrockco.net](https://solidrockco.net)

With Love,  
*Juanita Coley*  
The Contact Center Whisperer™  
That WFM Girl™

