

Optimizing Schedules

Creating Efficient and Balanced Work Plans

In Partnership With:



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
THEE CONTACT CENTER WHISPERER
Author of "WFM Go Beyond"

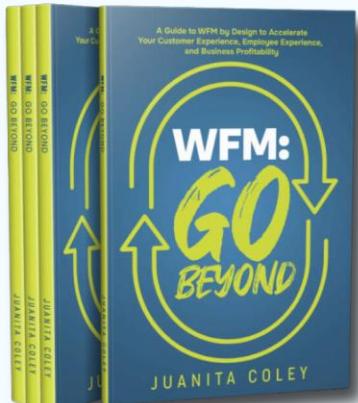
Recognized industry leader & award winner:

- 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.

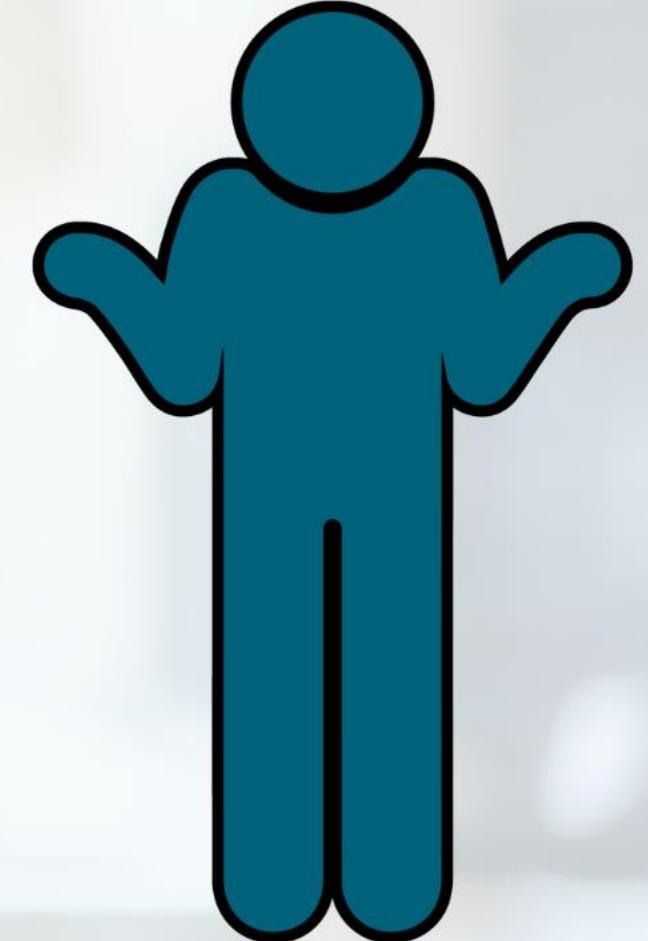


Let's Play A Game!

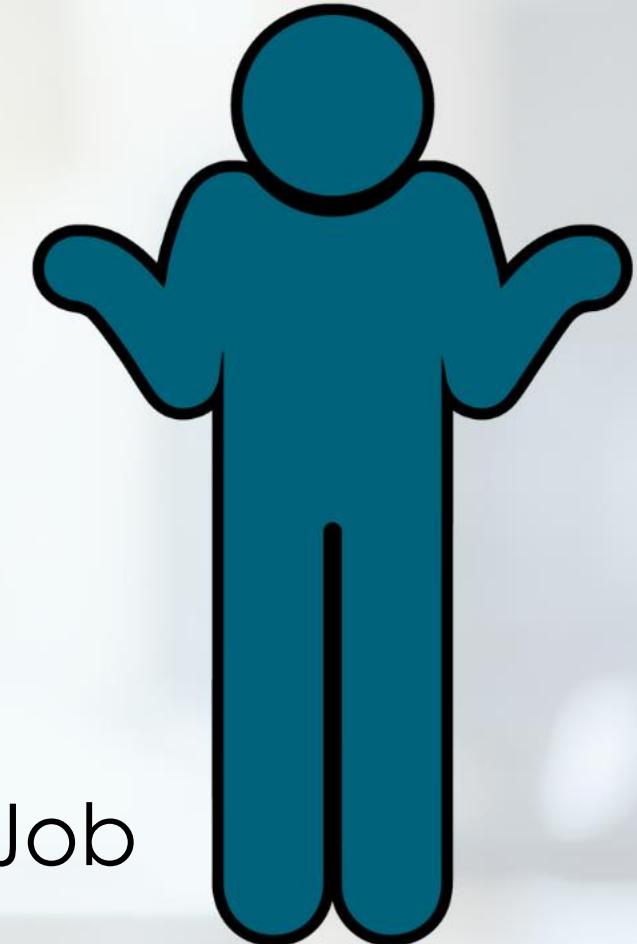
With ONE word...

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





Schedule Flexibility



Schedule Flexibility

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

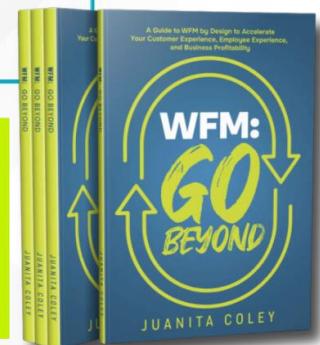
Let's Talk About The Real Problems...

@@ 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

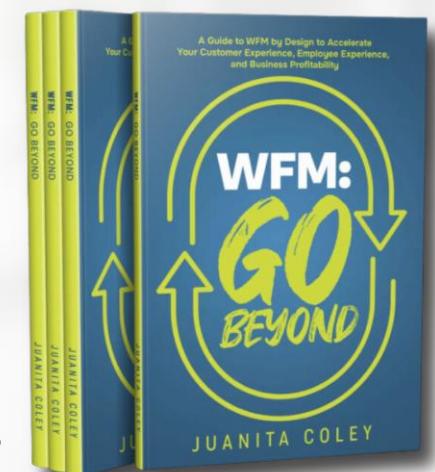
- Build schedules that work with your people, not against them.

🔑 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

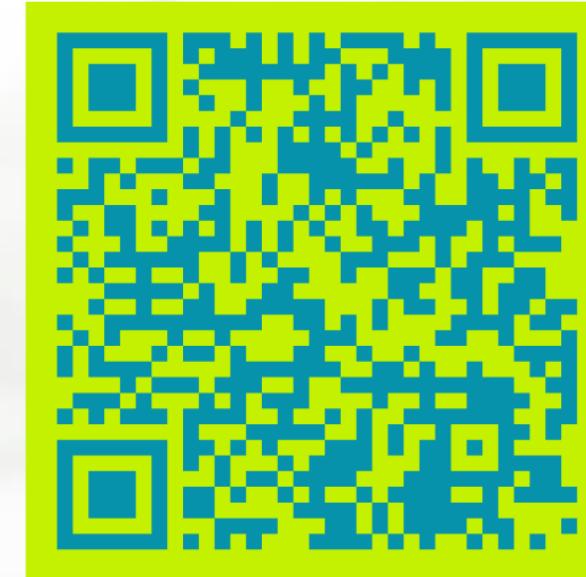
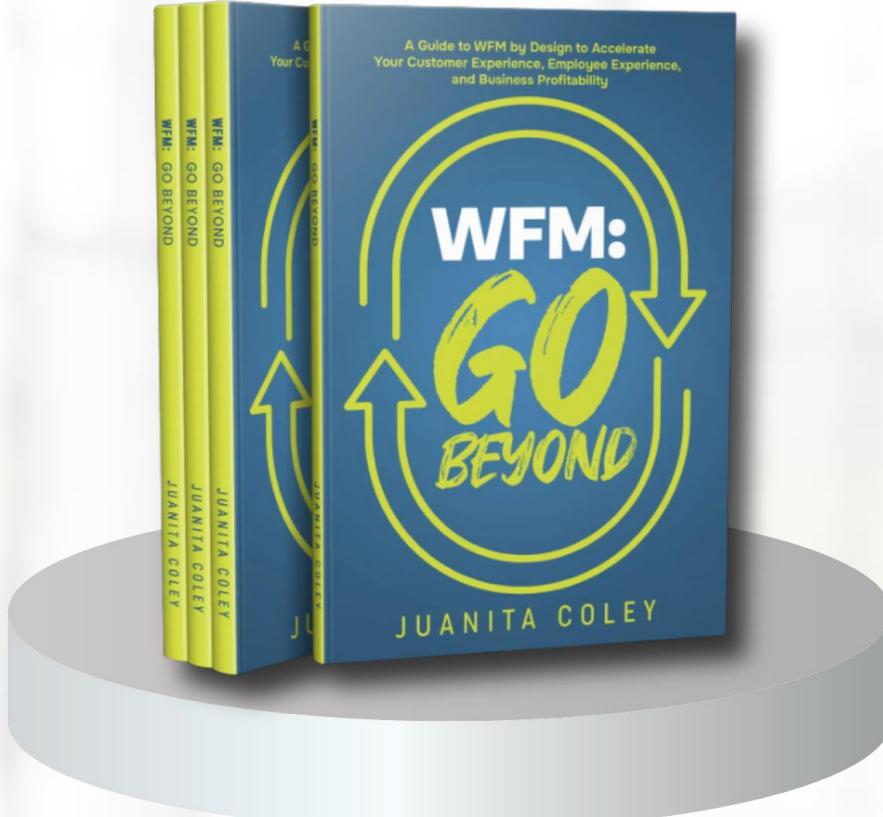


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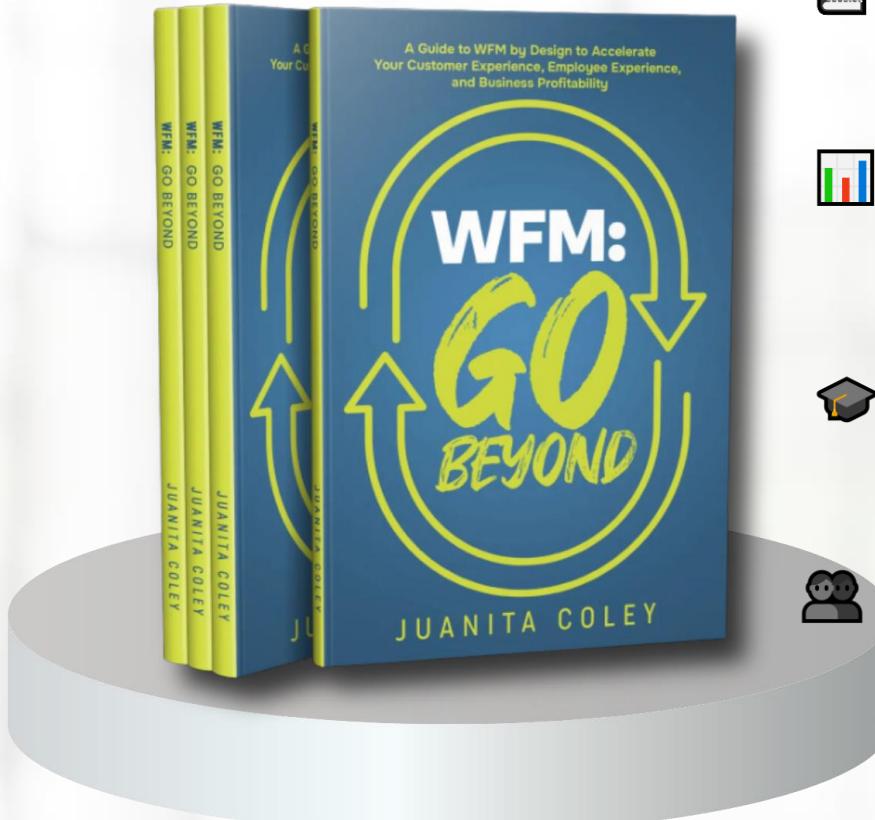
- WFM: Go Beyond Book (Physical or Digital Copy) – **Valued at: \$29.99**



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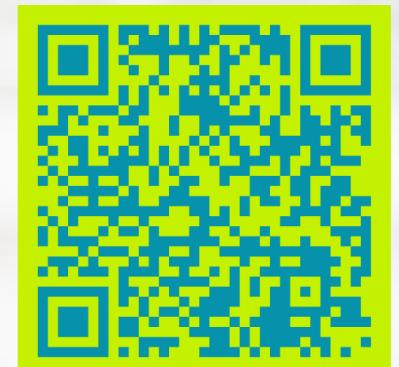
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Thank You For Joining Us!

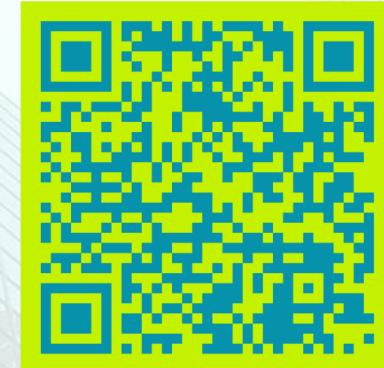


 **WFM is no longer a support function — it's a leadership advantage.**
Let's lead with strategy, not spreadsheets.

Next Step:

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

 **More Questions? Want to work together?**
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