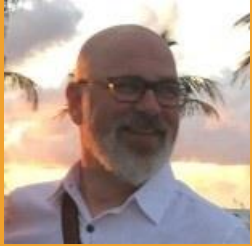# ROUNDTABLE - BEST PRACTICES IN WORKFORCE OPTIMIZATION

Dana Shalev, Head of Product Marketing at NICE WEM LOB
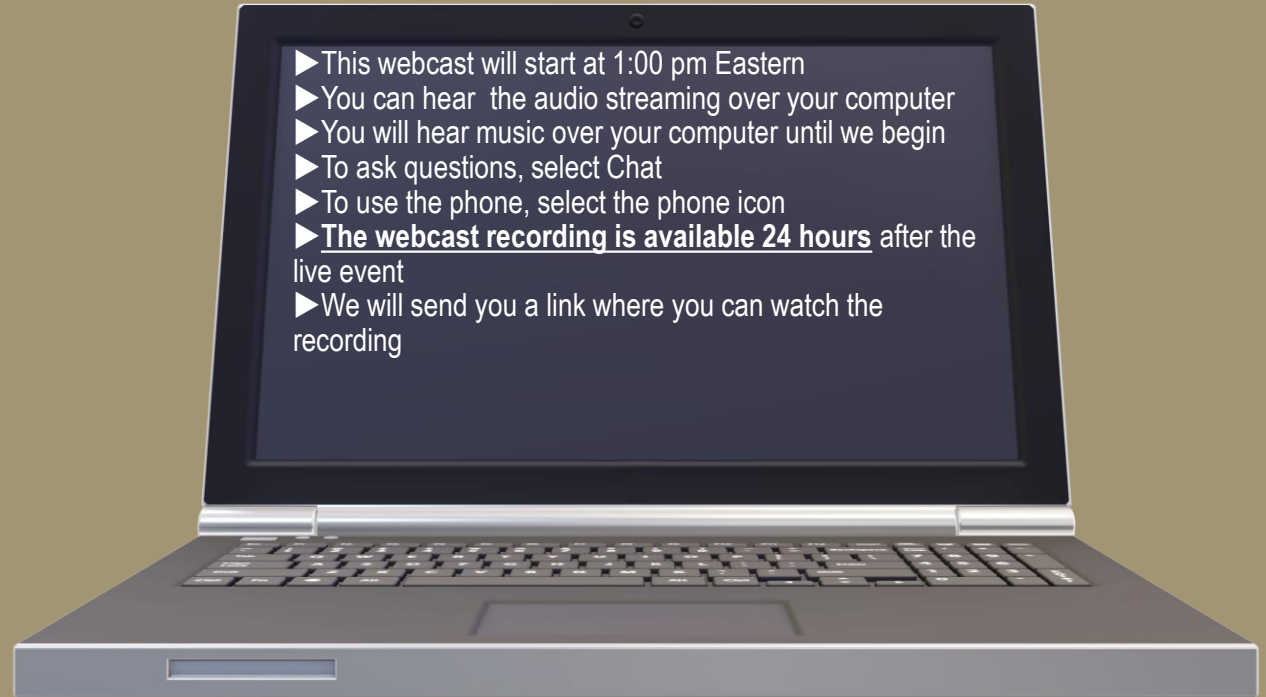
Trent Isaacs, Sr. Director, GTM Strategy, Real-Time Work, Verint

Robert Bradshaw, Founder/ President, WiserOwl

▶This webcast will start at 1:00 pm Eastern
▶You can hear the audio streaming over your computer
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▶To ask questions, select Chat
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▶**The webcast recording is available 24 hours** after the live event
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Best Practices In Workforce Engagement

Trent Isaacs

Sr. Director, GTM Strategy

VERINT®

FORECASTING THE FUTURE

Long Term Capacity Planning

35%
Attrition

WORKFORCE PLANNING BEGINS WITH RECRUITING & BACKFILL

35%
Attrition

WORKFORCE PLANNING BEGINS WITH RECRUITING & BACKFILL

10M
Interactions?

LONG TERM CAPACITY PLANNING IS MORE DIFFICULT THAN EVER

TALENT MANAGEMENT IS KEY

Data Driven Agent Support

A Solid Performance Management Strategy Feeds Talent Management

MEASUREMENT

KPI DEFINITION & TRACKING

A Solid Performance Management Strategy Feeds Talent Management

MEASUREMENT

KPI DEFINITION & TRACKING

CONSISTENT & PERSONALIZED LEARNING

LEARNING

A Solid Performance Management Strategy Feeds Talent Management

MEASUREMENT

COACHING

KPI DEFINITION & TRACKING

CONSISTENT & PERSONALIZED LEARNING

COACHING CULTURE REPLACES MEASUREMENT CULTURE

LEARNING

A Solid Performance Management Strategy Feeds Talent Management

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COACHING CULTURE REPLACES MEASUREMENT CULTURE

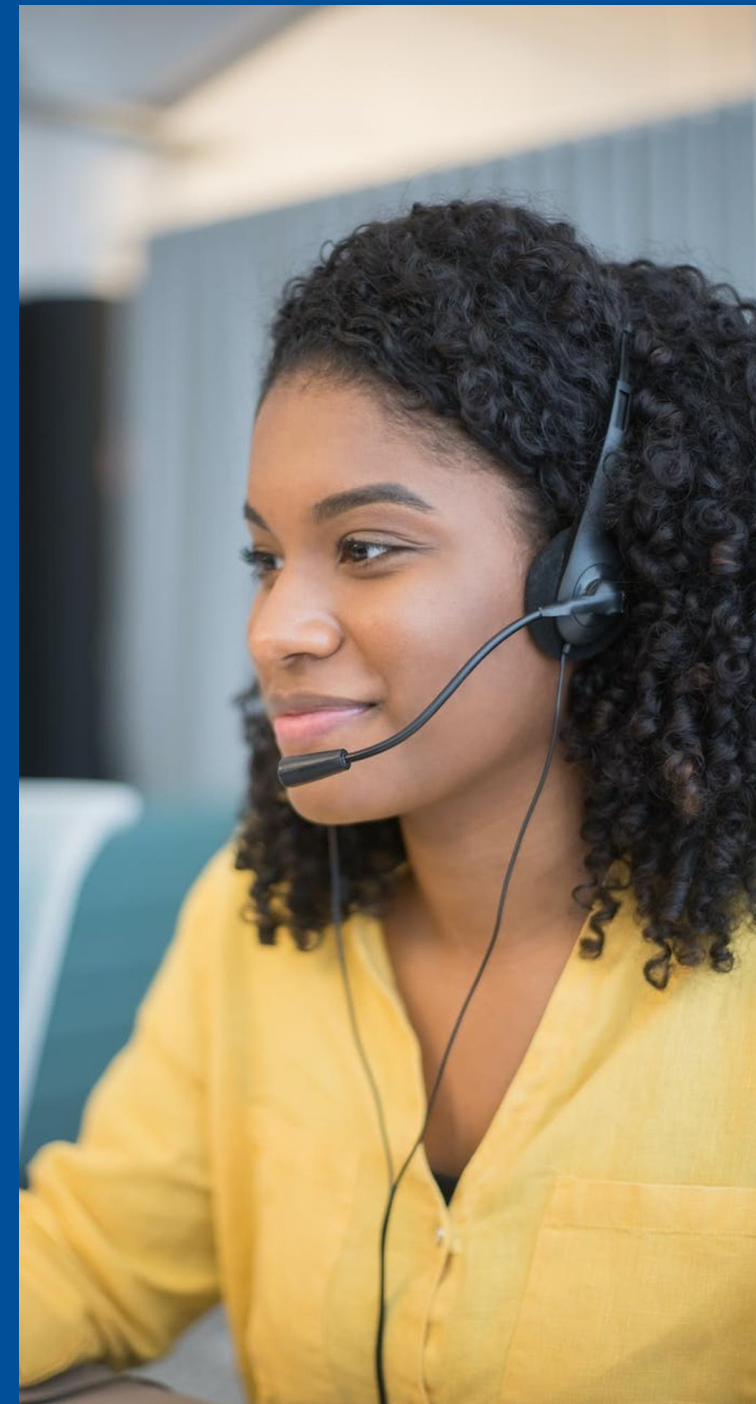MEET THEM WHERE THEY ARE, AND WHEN THEY NEED HELP

LEARNING

PERSONLIZE

RESULTS AS THE PRIME CITIZEN

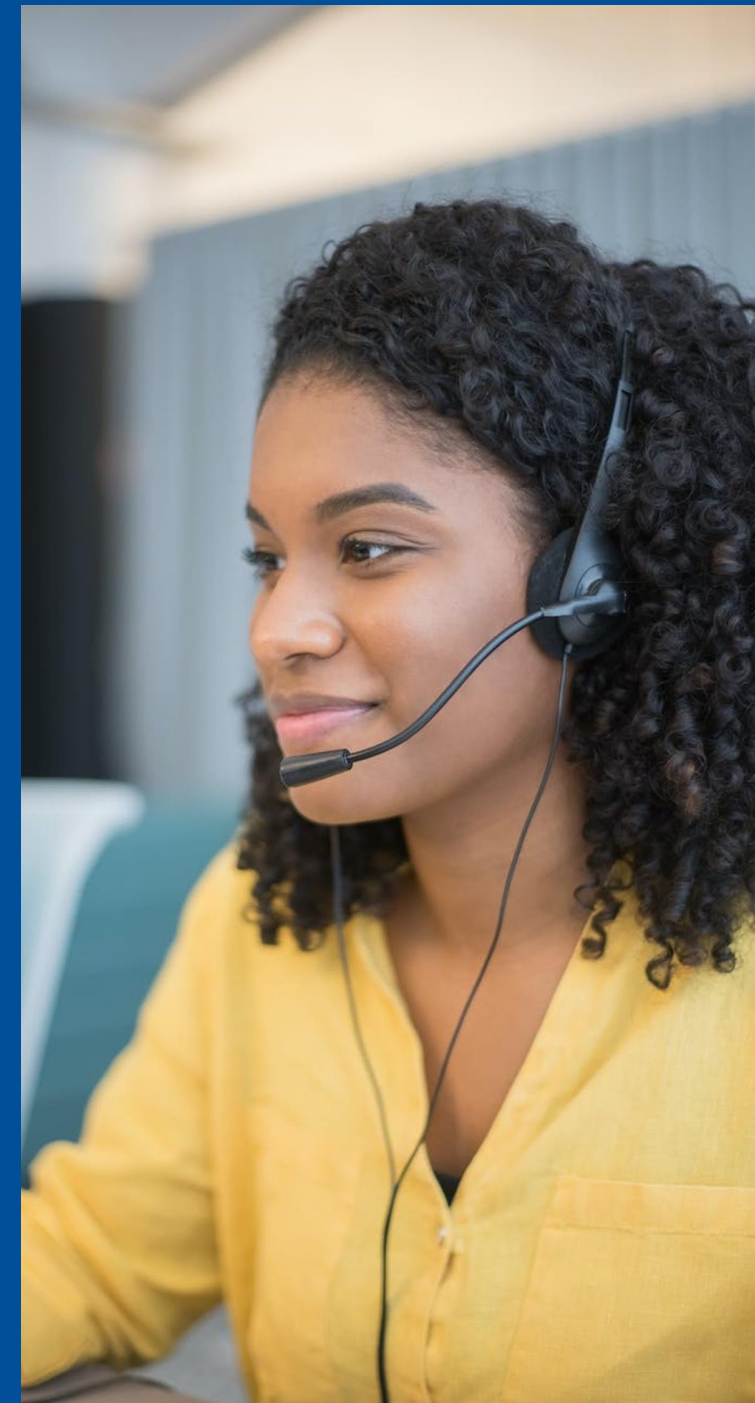# Insight Driven Management

1 **AGENTS NEED US TO SPEED UP OUR DELIVERY OF INSIGHTS TO HELP THEM DO THE JOB MOST IMPACTFULLY.**

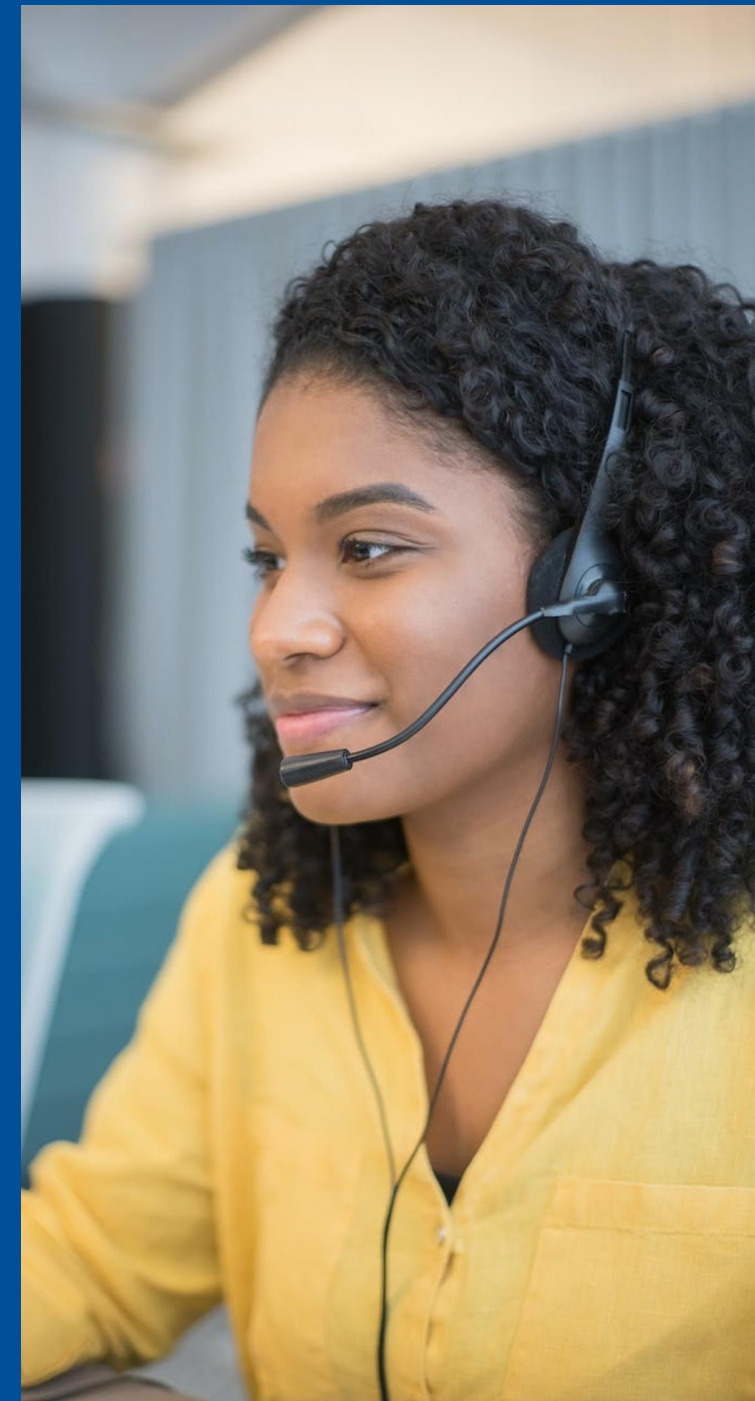**1** AGENTS NEED US TO SPEED UP OUR DELIVERY OF INSIGHTS TO HELP THEM DO THE JOB MOST IMPACTFULLY.

2 AUTOMATION ISN'T JUST FOR CUSTOMERS. AGENT SUPPORT REQUIRES THOUGHTFUL AUTOMATION AS WELL.

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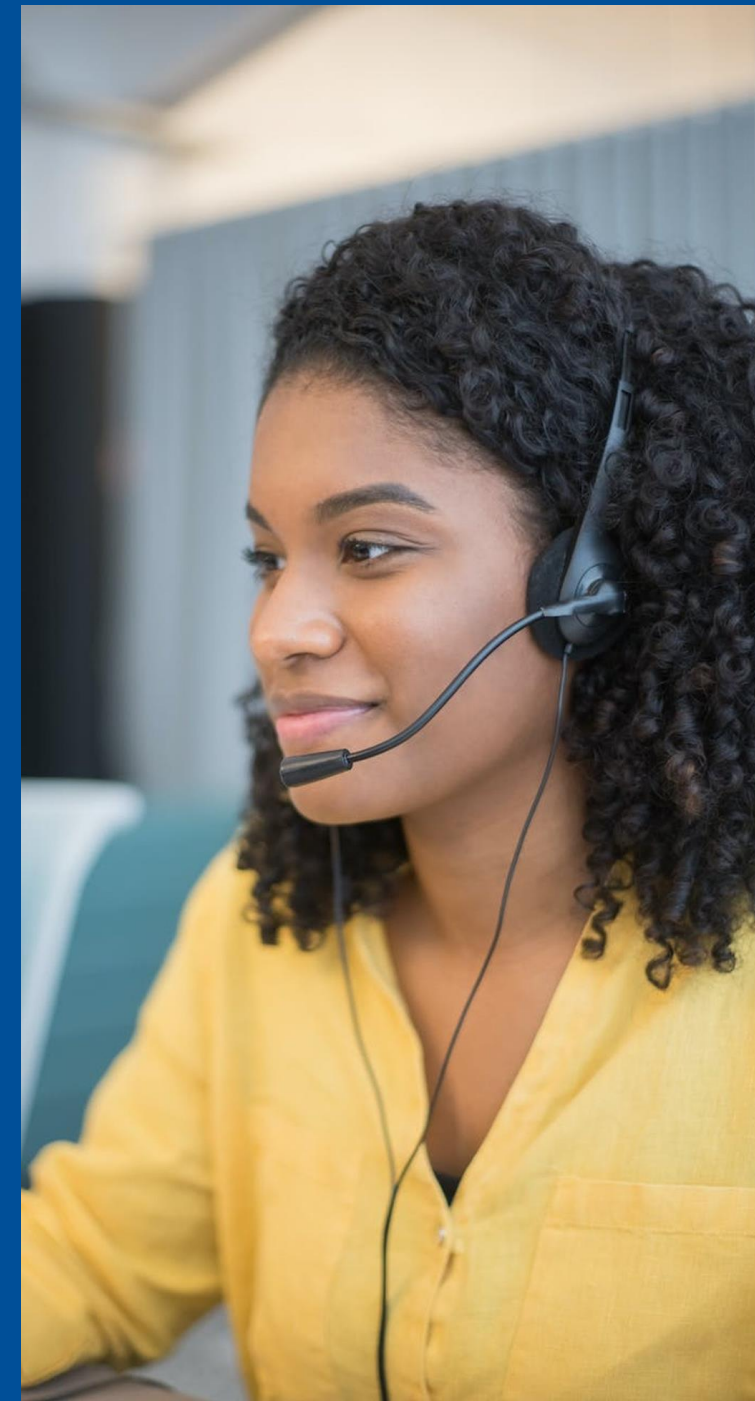
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5 YESTERDAY'S NUMBERS WON'T RUN TO SAVE US, BUT INSPIRED PEOPLE WILL.
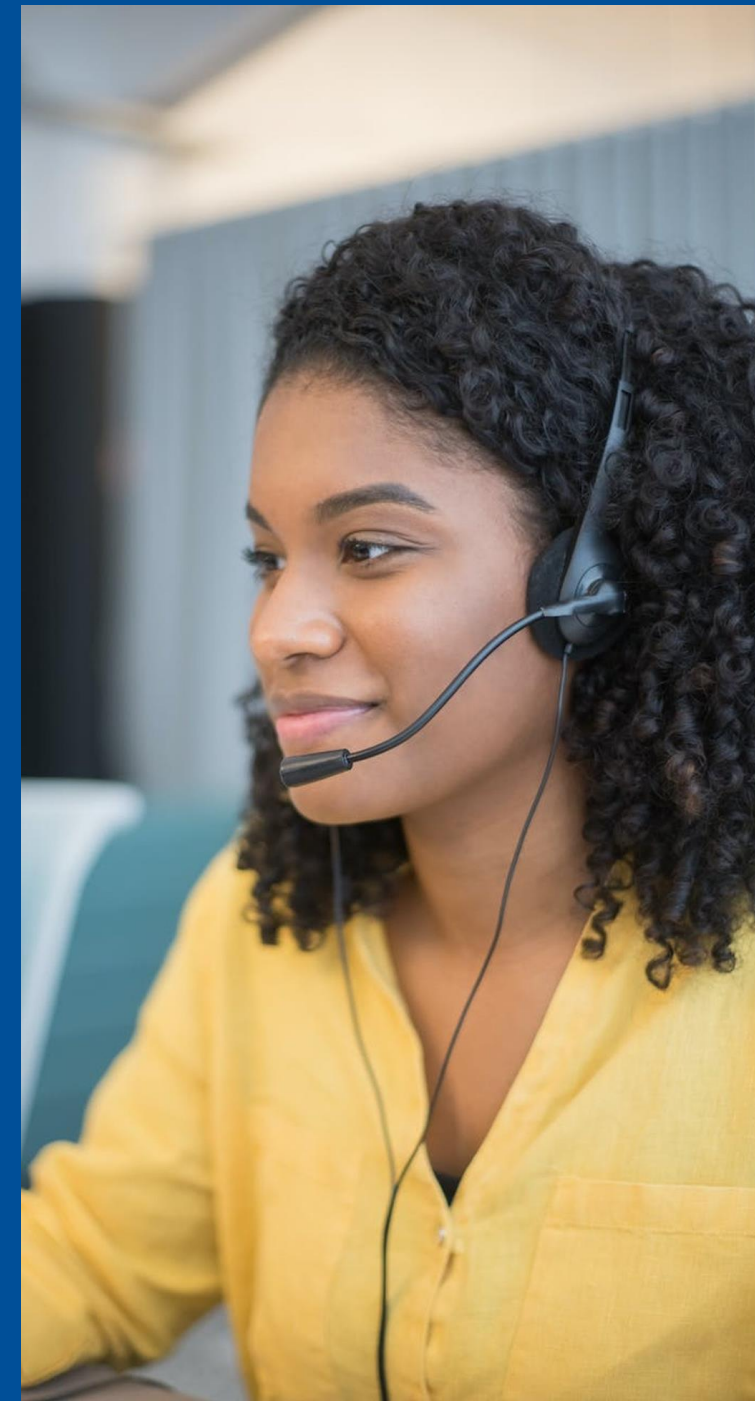
Speaker Contacts

Trent Isaacs

Senior Director, GTM Strategy
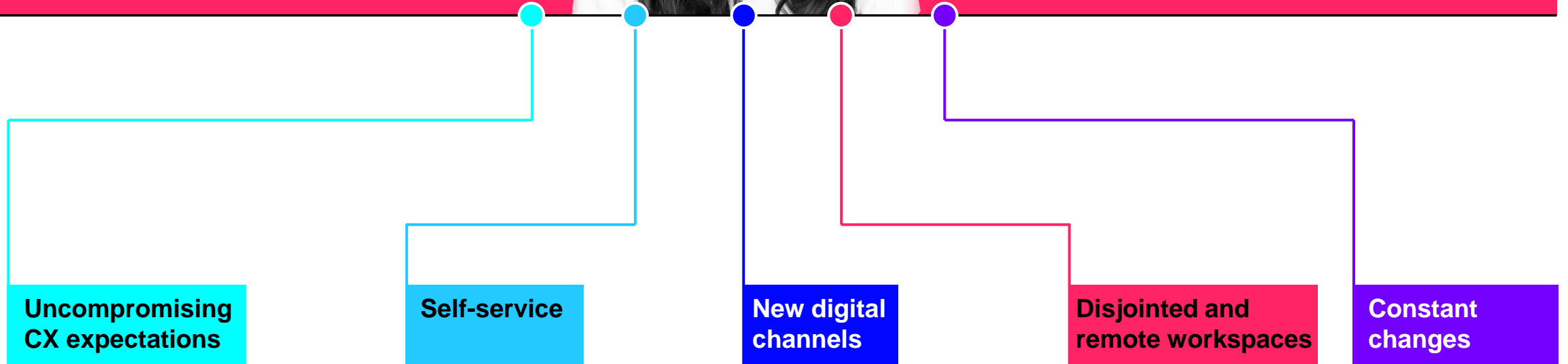
trent.isaacs01@verint.com

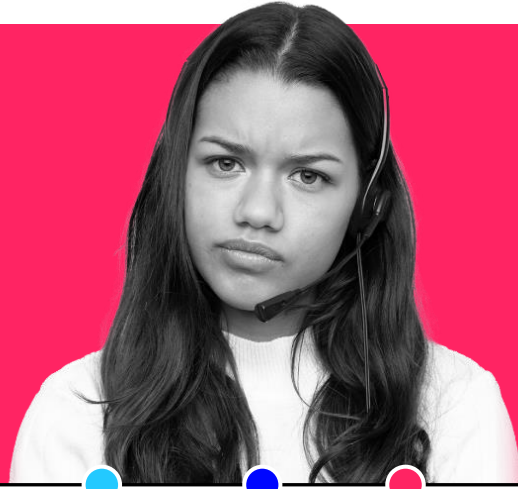# Navigating the complexities of modern CX

Dana Shalev
NICE WEM Director of Product Marketing

The agent's role isn't diminishing.
In fact, it is becoming more critical.

Uncompromising CX expectations

Self-service

New digital channels

Disjointed and remote workspaces

Constant changes

Out-of-Control Complexity

NICE

AI

The ONLY way to cope with the ever-increasing complexity

NICE

Gen AI for CX industry employees

Conversational Knowledge:
Discovery of info: knowledge, best practices, benchmarking, trends, root cause analysis and more

Real-Time Assistance:
Alerts & notifications (sentiment, sales at risk, out of adherence), next-best action, guidance, compliance and coaching
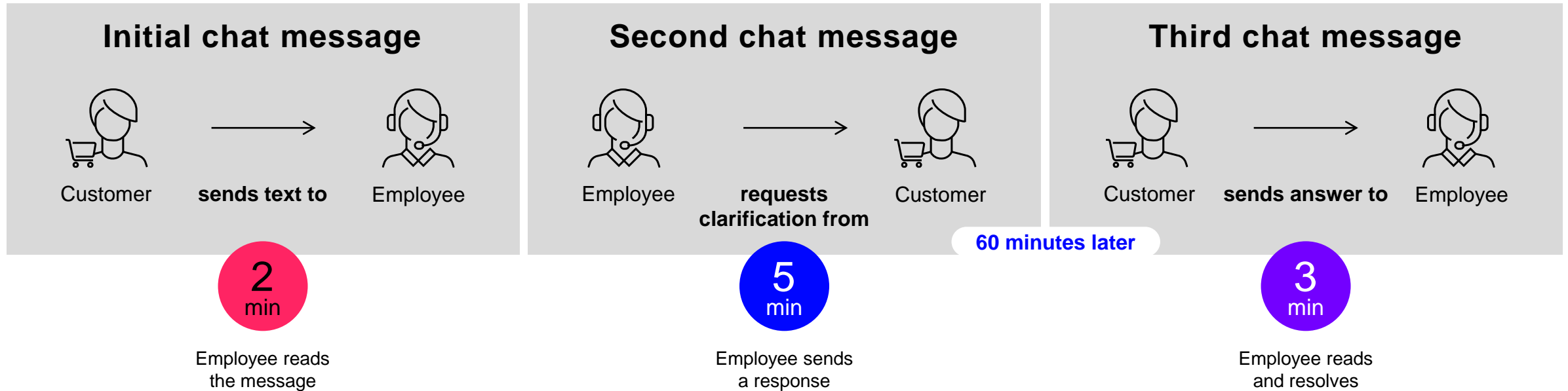
Task Automation:
Summarizing calls, filling out evaluation forms, setting coaching session and more

NICE

Customers expect
to be able to use their
**preferred communication
method** with the
companies with which
they deal.

NICE

Challenges with Long Asynchronous Interactions

Initial chat message

Customer — **sends text to** → Employee

2 min

Employee reads the message

Second chat message

Employee — **requests clarification from** → Customer

5 min

Employee sends a response

60 minutes later

Third chat message

Customer — **sends answer to** → Employee
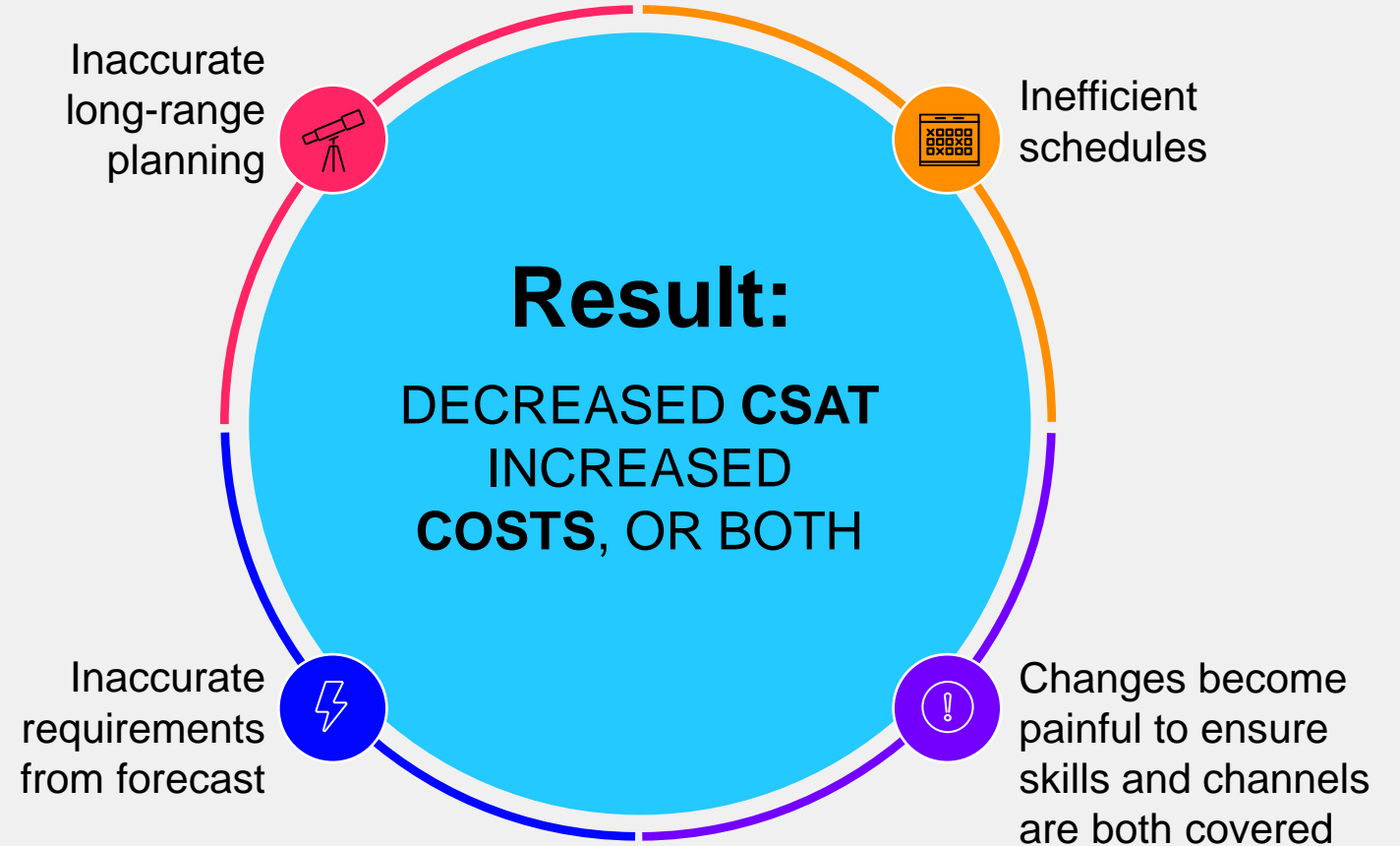
3 min

Employee reads and resolves

How should the WFM algorithm count this?

A One contact that lasted 10 minutes?

B One contact that lasted 70 minutes?

C Three separate contacts with 3 minutes and 20 seconds AHT?

NICE

Understanding the Pain of Treating Digital Channels Too Simplistically

Inaccurate long-range planning

Inefficient schedules

Result:
DECREASED **CSAT**
INCREASED **COSTS**, OR BOTH

Inaccurate requirements from forecast

Changes become painful to ensure skills and channels are both covered

NICE

A PARADIGM SHIFT

WFM needs to leverage analytics that are based on the actual work time, true to the interval in which it occurred

NICE

Answered & Active True to Interval Analytics

Paradigm shift…

FROM
report when contact ended $\longrightarrow$ **TO**
report when activity occurred
(answered + active, TTI)

Cases/ tickets/ conversations are **automatically decomposed** into data that is usable for WFM purposes at the interval level

Volume/ AHT forecasts, staff requirement calculations, and schedules are driven by **historical patterns** of **interval-specific** activity required to resolve **long-duration** cases/ tickets/ conversations
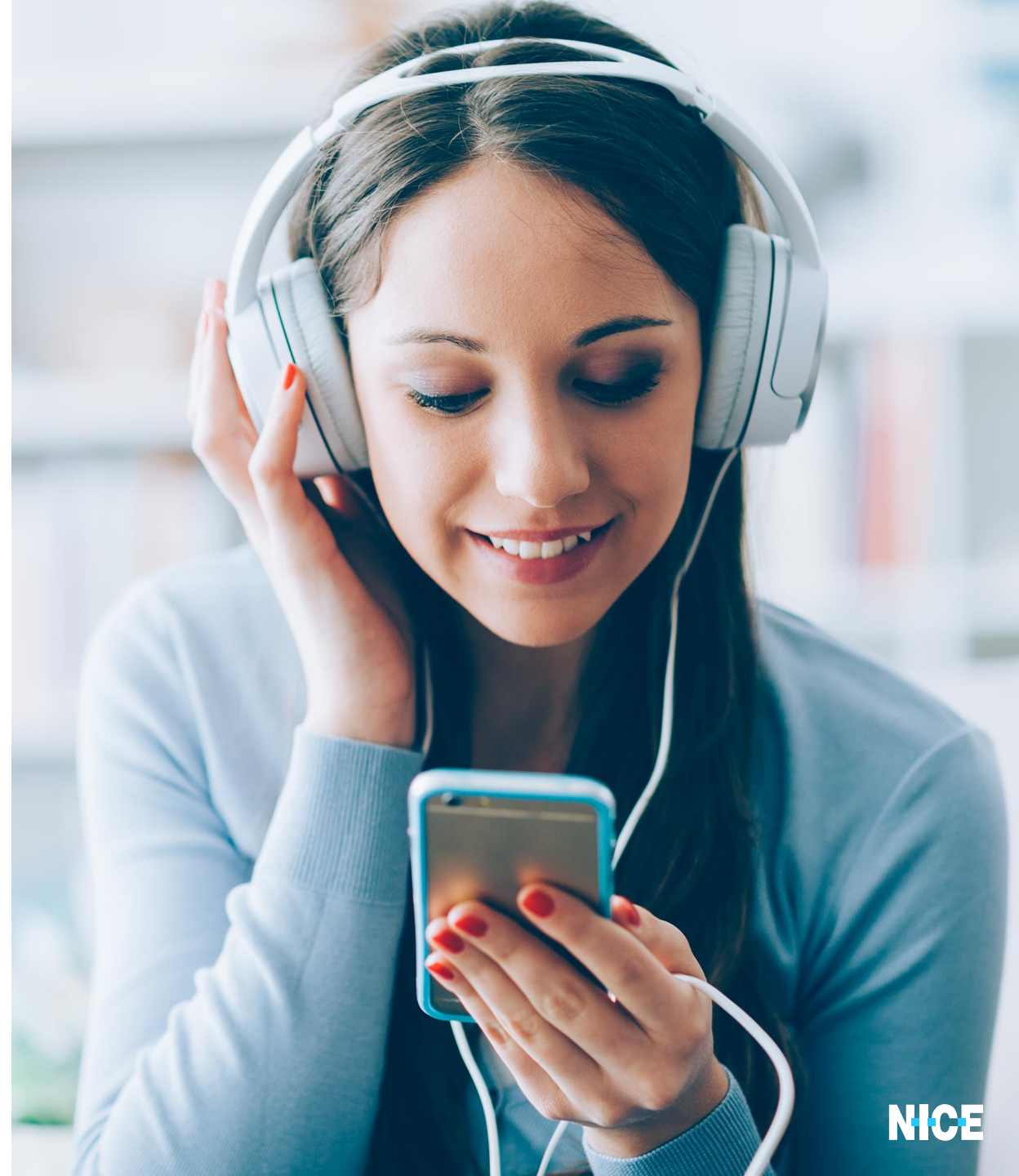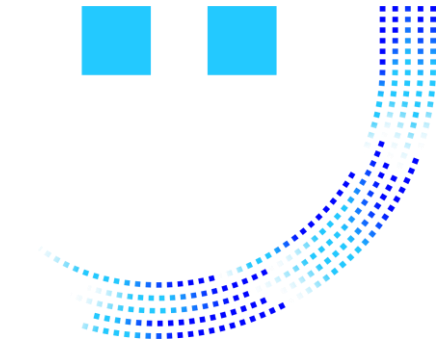
NICE

The Benefits of Improved Accuracy

Reduce costs associated with over staffing - **resolves false staffing requirements**

Keep high level of CX, avoiding under staffing - **aligns schedules with the life cycle of contacts**

Better manage agents' time

NICE

Thank You!

Best Practices In
Workforce Optimization

ROBERT BRADSHAW

Make You Better

Dollar-Based Approach

Cost of Agent Actions

Identifying Agent Needs

Wrap-up Costs

45 seconds
$1.2M / year

Wrap-up Costs

45 seconds
$1.2M / year

30 seconds
$800K / year

Saving $400K / year

Agent Performance Measures

ENABLEMENT
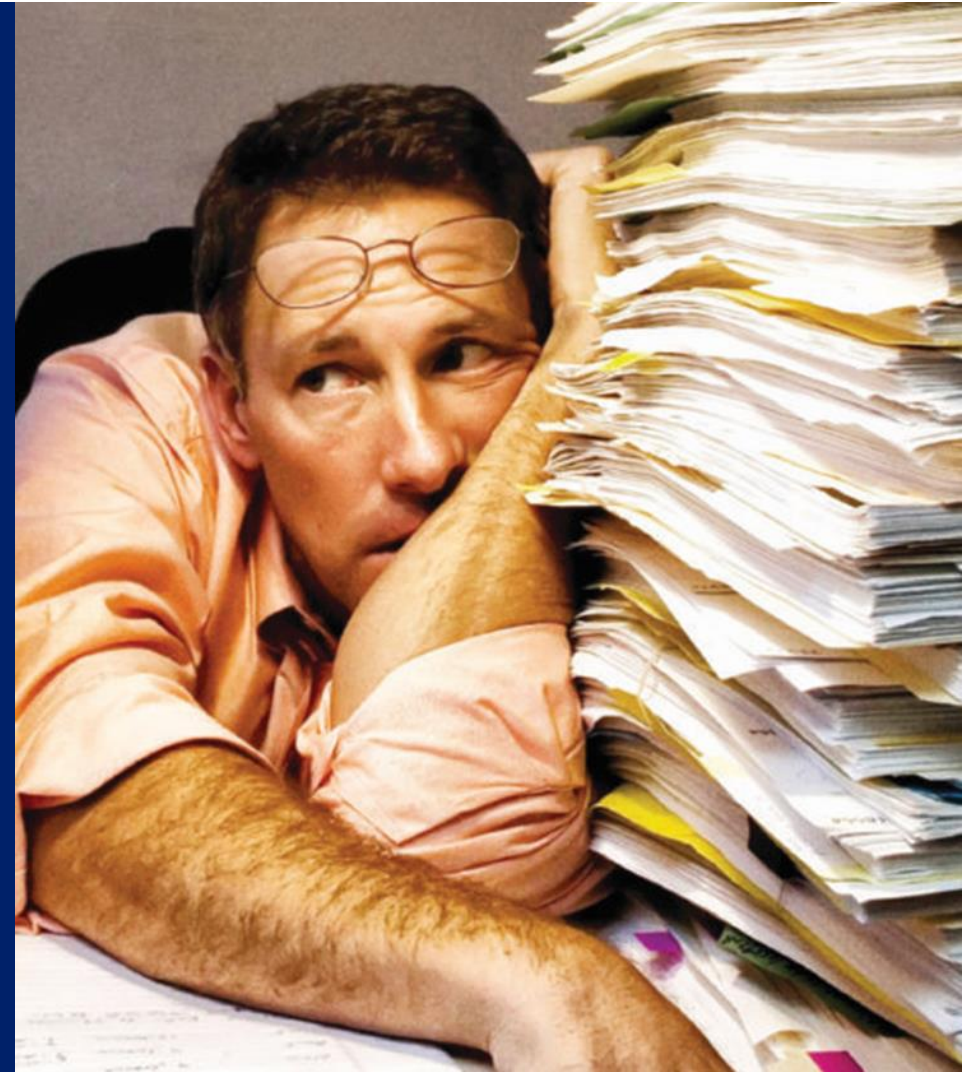
VS.

EMPOWERMENT

WISEROWL®
SEE THE ECONOMICS OF CUSTOMER EXPERIENCE

Off-phone Work

FINANCIAL PRESSURE

- Where is money spent and how?
- Where and how to save money?
- Empower agents

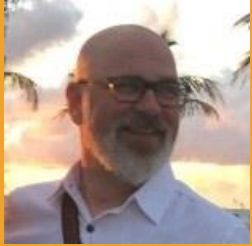450 Jackson St. #246,
Columbus, Indiana 47201

877.505.8579

WiserOwl.com
info@WiserOwl.com

ROUNDTABLE - BEST PRACTICES IN WORKFORCE OPTIMIZATION
Q&A

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