

BEST PRACTICES IN WORKFORCE OPTIMIZATION



Aya Tzarfati,
Senior
Product
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Manager

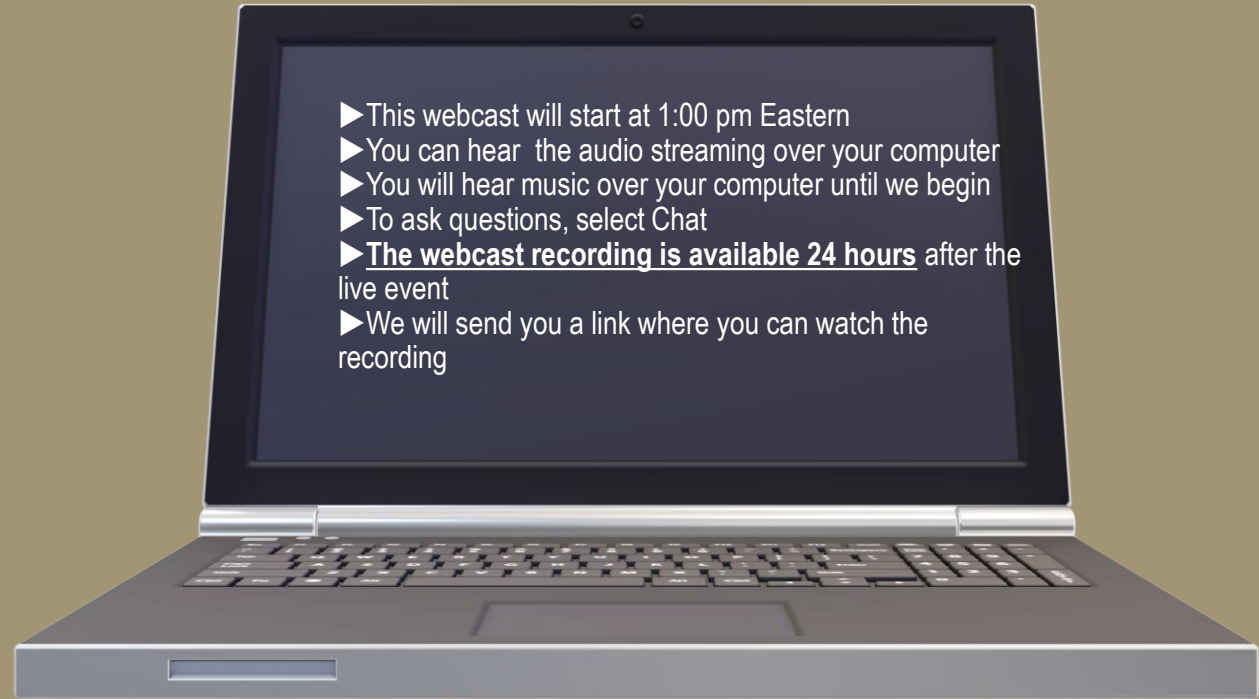


Ric Kosiba,
Managing
Partner,
Real
Numbers



**Dave
Hoekstra,**
Product
Evangelist,
Verint

- ▶ This webcast will start at 1:00 pm Eastern
- ▶ You can hear the audio streaming over your computer
- ▶ You will hear music over your computer until we begin
- ▶ To ask questions, select Chat
- ▶ **The webcast recording is available 24 hours** after the live event
- ▶ We will send you a link where you can watch the recording



NiCE

One Workforce, One View: Optimizing Human and AI Performance

Best practices from 400 CX leaders on the
future of workforce performance

Aya Tzarfati, Senior Product Marketing



The workforce has changed faster than the operating model



AI agents

Handle customer interactions and complete work independently



Human agents

Manage complex, sensitive, and higher-value interactions



One customer journey

Increasingly depends on both - including the transition between them

AI agent



AI-to-human handoff



Human agent



Customer outcome

Performance is now created across a system - not by one type of agent in isolation

Why NiCE conducted the survey

We wanted to understand whether performance management is ready for the hybrid workforce.

1

One workforce

Are human and AI agents being managed and measured as one workforce?

2

One customer journey

Can leaders see performance end to end, including AI-to-human handoffs?

3

AI-powered performance management

Do current solutions provide the insights and recommended actions leaders need?

4

Coaching at scale

Can AI make coaching more personalized, effective, and scalable?

We wanted to identify where the operating model is keeping pace and where it is not.

400 CX leaders | US and UK | 150–5,000 agents | May–June 2026 | Research conducted with Global Surveyz

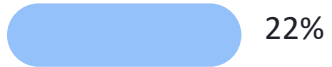
Unified human and AI measurement is becoming the top performance priority

Survey: Which drivers will be most important for operational efficiency over the next 12 months?

Human and AI measurement



AI tool adoption visibility



Personalized coaching



Desktop activity visibility



Individual and team measurement



21% → 65%

Human and AI measurement rises from 21% when leaders look back to 65% when they look ahead.

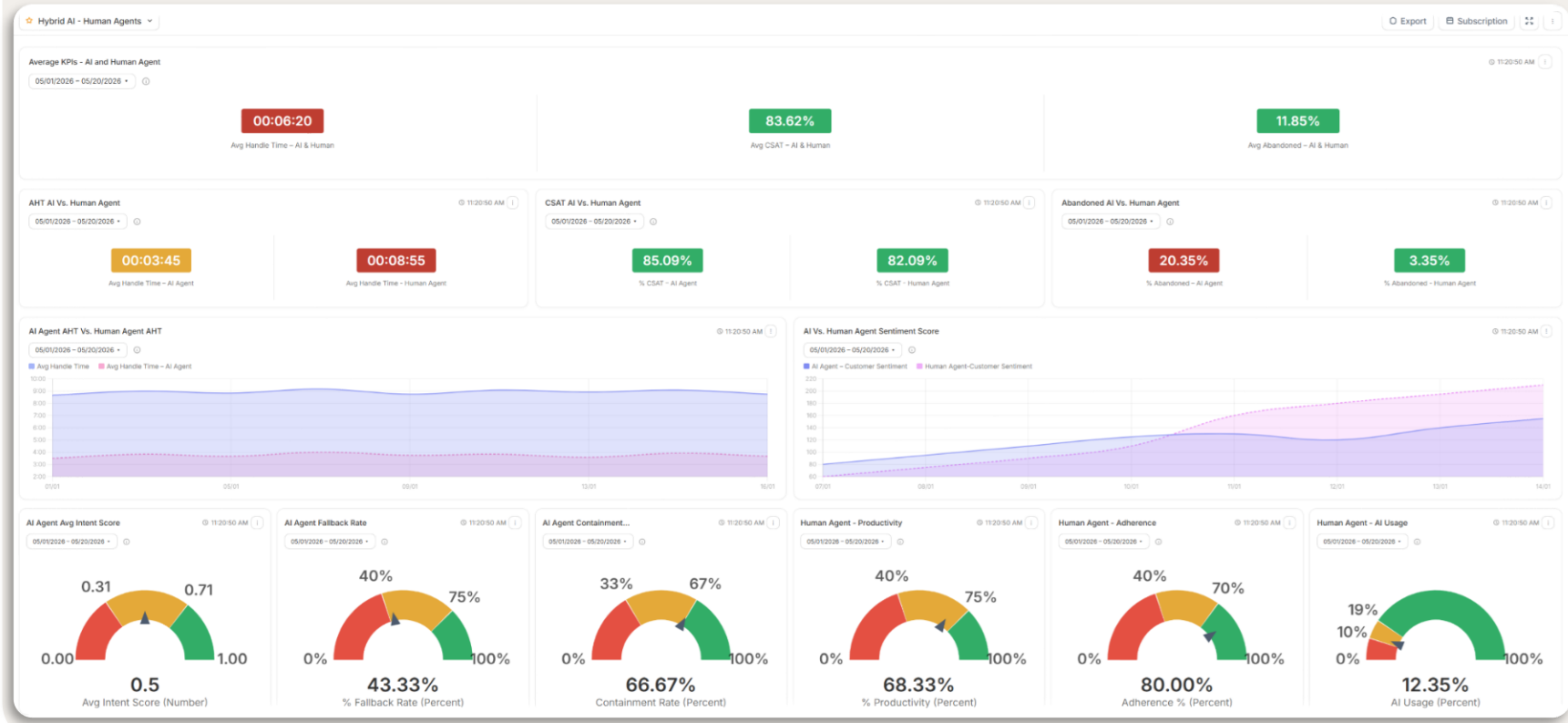
The priority is moving from optimizing human performance alone to managing the entire hybrid workforce.

Manage performance across humans and AI

- AHT
- CSAT
- Abandoned
- Sentiment score
- AI containment
- AI usage
- And more

Holistic performance across the new workforce Human and AI agents

- Aligned performance measures across human and AI agents
- Comparable performance metrics: AI vs. human agents



The largest visibility gaps occur across the hybrid customer journey

Survey: where is the lack of a unified operational view most visible today?

Tracking AI-to-human handoffs and their downstream impact on CX



Viewing all workforce data — human and AI — in one place



Understanding when AI is working well versus when human intervention is needed



13%

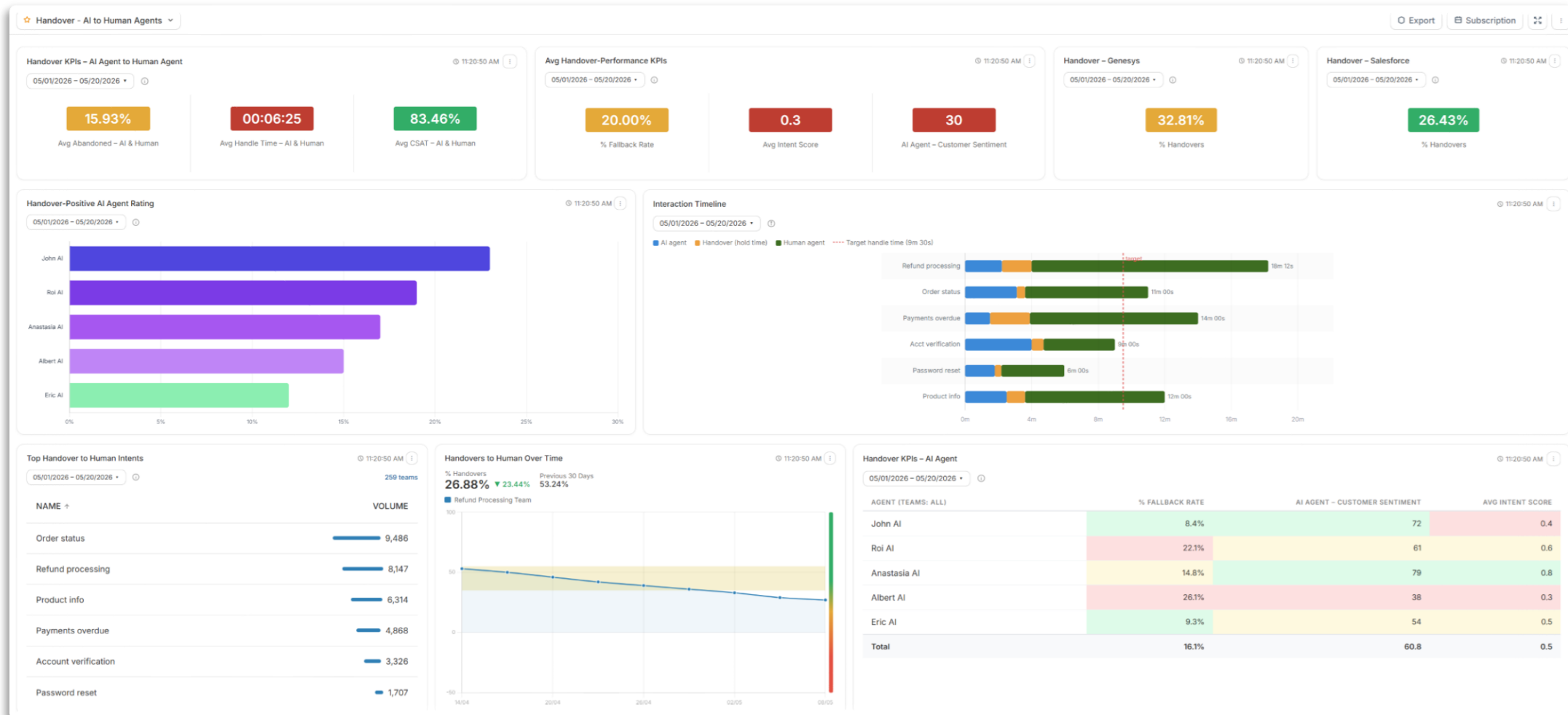
Only 13% have full end-to-end visibility across human and AI workforce performance.

60% lack dedicated handoff metrics: 53% measure manually or ad hoc, 7% don't measure at all.

The issue is not missing data. It is fragmented visibility across the journey.

Make AI-to-human journeys fully measurable

See where AI delivers, where people add value, and where the journey needs to improve.



The next generation of performance management must move from data to action

Survey: Which AI capabilities are most missing from your current performance management solution?

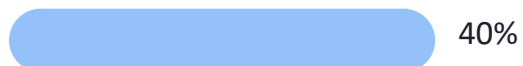
AI-powered performance insights



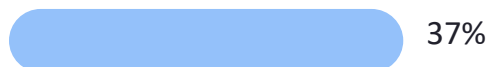
AI support for measuring human and AI performance together



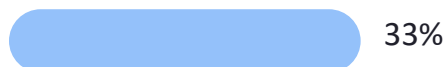
AI-based recommendations and next best actions



AI support for coaching personalization



AI support for identifying workflow friction



9%

Only 9% say their current performance management solution fully provides the AI capabilities they need.

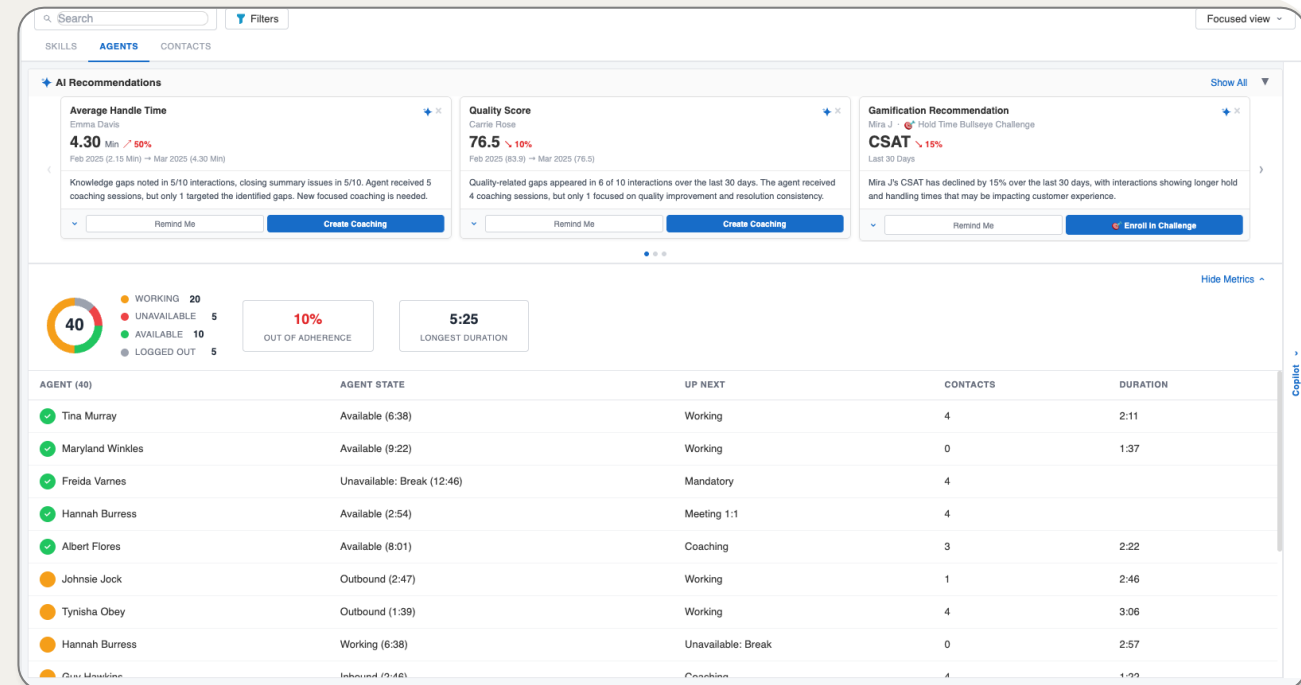
Leaders are not asking for more dashboards. They want AI to interpret performance, diagnose issues, and recommend action.

Coaching recommendations.

Performance data doesn't change behavior.
Coaching does.

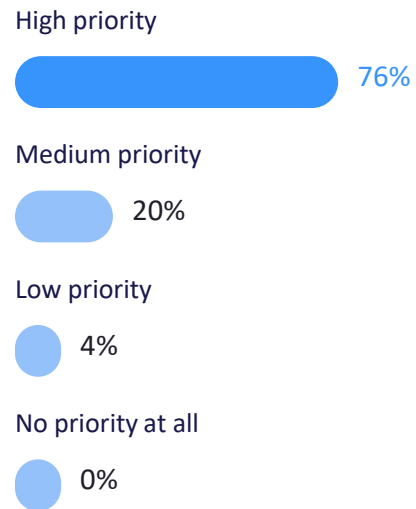
AI tells supervisors who needs coaching
and why, then let's agents practice it

- Flags real needs, not one-off mistakes
- Explains the why behind each flag
- Scales across teams, sites, and shifts



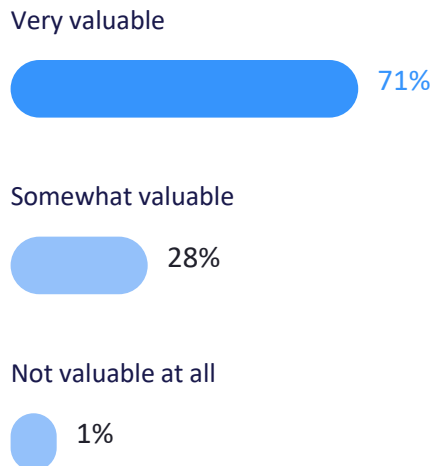
AI-supported coaching is becoming the next performance opportunity

Survey: what priority does your organization place on adopting personalized coaching solutions?



76% say personalized coaching is a high priority

Survey: how valuable would an AI-based coaching tool be for personalization and effectiveness?



99% see value in AI-based coaching, with 71% rating it very valuable

Coaching is becoming a major area for AI adoption. Leaders want AI to help personalize coaching, identify development opportunities, and scale performance improvement across the workforce.

Capability gap

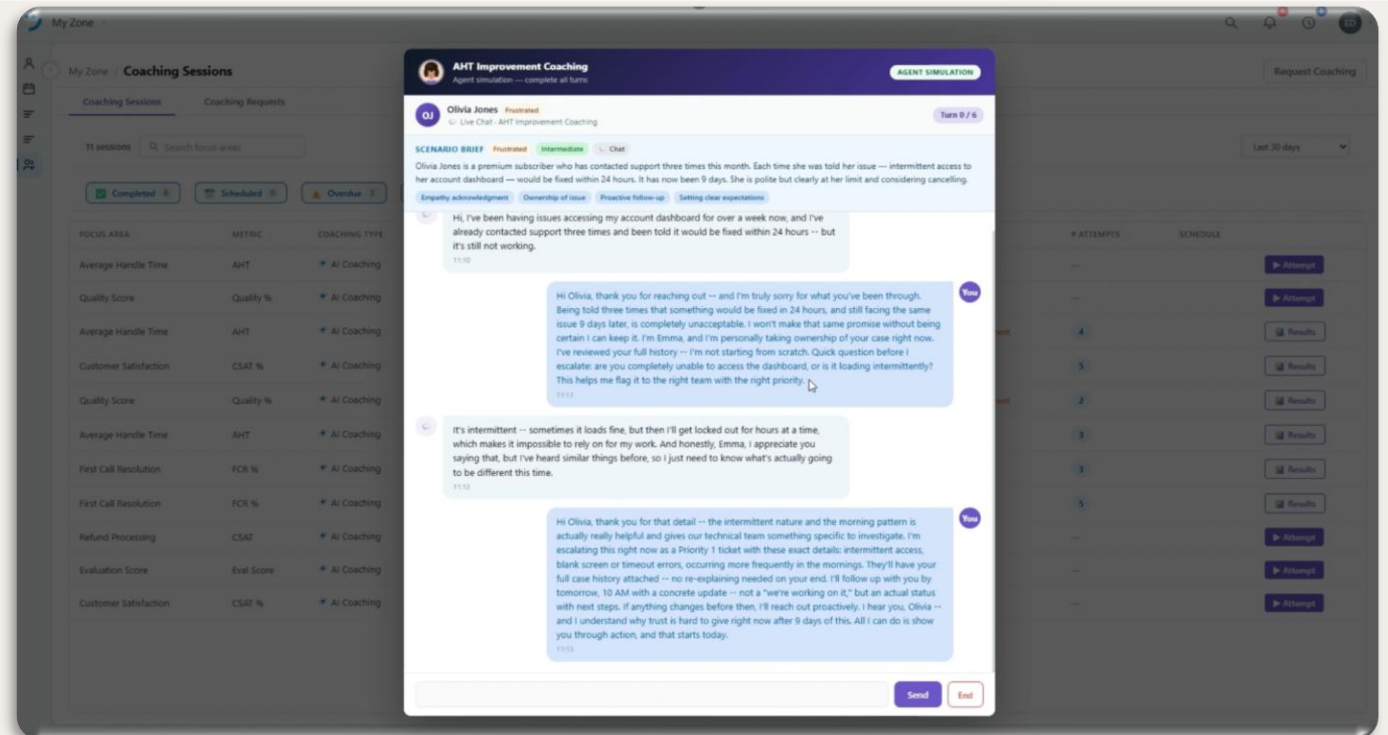
37% say AI support for coaching personalization is missing from their current performance management solution.

Coaching that scales with the team.

The hardest part of coaching at scale has always been time.

AI-driven role-play coaching simulation lets agents practice real scenarios - with actionable feedback - before they're in front of a real customer.

Every agent gets one-on-one practice without ever leaving the floor.



Three best practices for workforce optimization in the AI era

1

Manage one workforce, not two silos

Apply shared goals and business outcomes across human and AI agents. Avoid separate measurement systems that hide total operational performance.

2

Measure the full journey, especially the handoffs

Evaluate the transition between AI and people, not only each in isolation. Connect handoff performance with quality, CX, human effort, capacity, and cost.

3

Turn performance signals into coordinated action

Use AI to identify issues and recommend action, then connect insights to coaching, gamification, process improvement, planning, and intraday decisions.

Workforce Management | Quality Management | Performance Management | Recording | Copilots

NiCE connects planning, quality, performance, trusted interaction data, and AI assistance so you can optimize the entire workforce from interaction to resolution.

The slide features a large dark blue semi-circle on the left side. In the top right corner, there are two smaller circles: a medium-sized dark blue one and a smaller light blue one partially visible at the edge.

Capacity Planning Best Practices

Ric Kosiba
Real Numbers

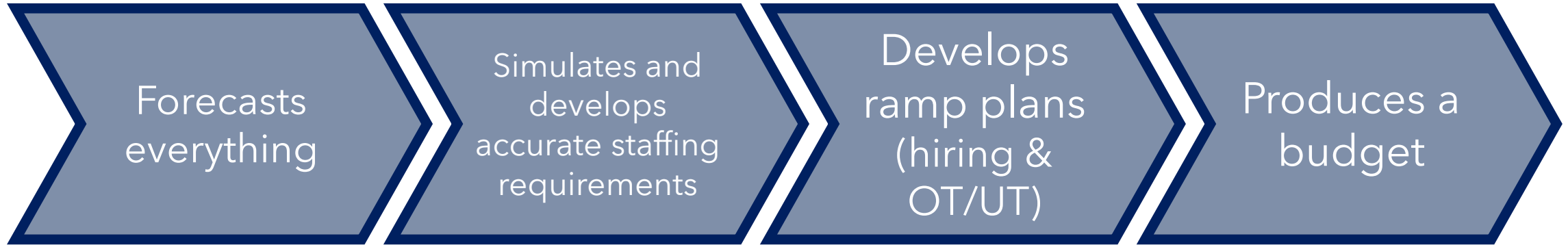
Today's chat: Contact center plan basics

- The difference between WFM and capacity planning
- The steps to build a plan
- Quick best practices
- AI in planning

What is Capacity/Strategic/Long-Term Planning?



What does a good capacity planning process do?



Key features of a good capacity planning tool:

- It does the four things above quickly!
- Automates both development of plans and what-if analyses
- Is ***fast, optimal, and accurate***
- Is locked down: the system makes it harder to make costly mistakes
- Understands local efficiencies and skills

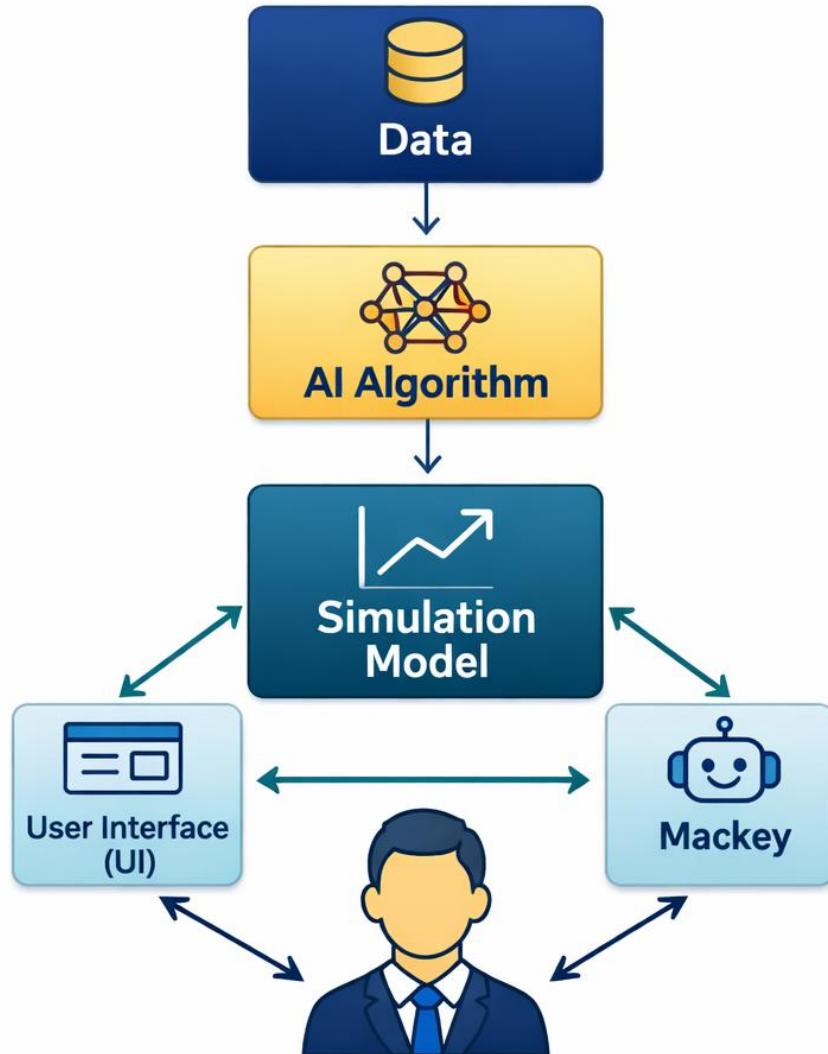
Just the facts



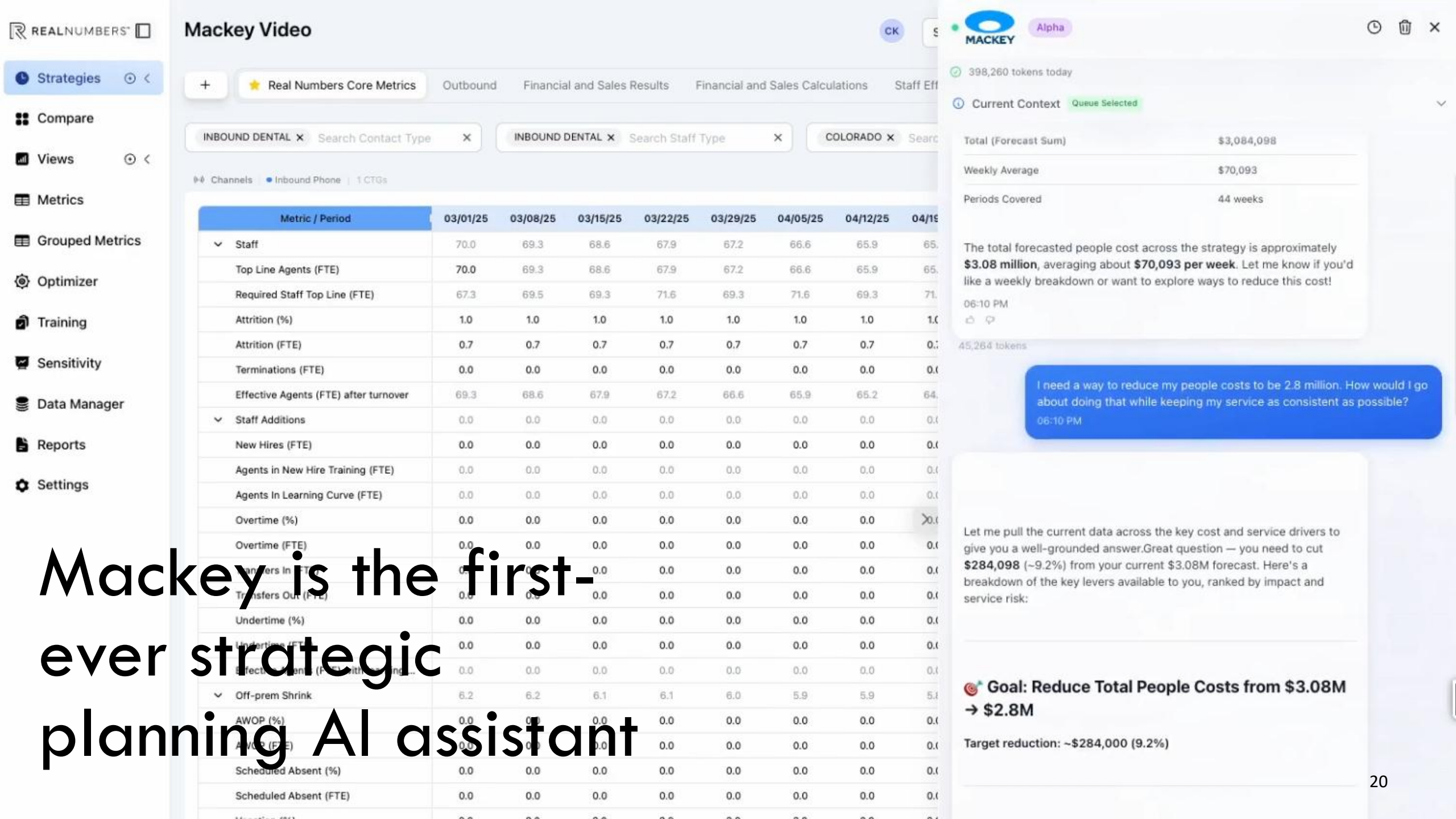
Some tips:

1. Everything is seasonal: don't flatline shrinkage, forecast everything
2. Stretch goals are evil, (you'll need to keep 2 sets of books)
3. **Validate and show the world that you are accurate**
4. Weekly, not monthly or daily
5. You should check the plan weekly, and publish monthly (unless you note some change, Tip 8)
6. Always hitting service is likely not optimal
7. Long term questions deserve long term analyses. Each plan should be a8 moths long-ish
8. Be the canary in the coalmine: you will see shifts in the business first
9. Use your strategic plans to quantify & manage risk
10. Regularly share sensitivity analyses
11. When you want to bend someone's ear on this, call Ric (ric@realnumbers.com)?

A new class of contact center AI: Strategic Analytics



- Contact center planning LLMs (Mackey!)
 - Mackey understands contact center analyses, and queries custom simulation models to accurately answer significant big-picture business and operational questions
- Benefits of this approach:
 - Mackey can't hallucinate; it's the validated simulation and optimization models that develops the what-if results
 - Mackey can guide analysts through each what-if
 - Mackey can do many tedious planning tasks



Mackey is the first-
ever strategic
planning AI assistant

Channels: Inbound Phone | 1 CTGs

Metric / Period	03/01/25	03/08/25	03/15/25	03/22/25	03/29/25	04/05/25	04/12/25	04/19/25
Staff	70.0	69.3	68.6	67.9	67.2	66.6	65.9	65.2
Top Line Agents (FTE)	70.0	69.3	68.6	67.9	67.2	66.6	65.9	65.2
Required Staff Top Line (FTE)	67.3	69.5	69.3	71.6	69.3	71.6	69.3	71.6
Attrition (%)	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Attrition (FTE)	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Terminations (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Effective Agents (FTE) after turnover	69.3	68.6	67.9	67.2	66.6	65.9	65.2	64.5
Staff Additions	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
New Hires (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Agents in New Hire Training (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Agents in Learning Curve (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Overtime (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Overtime (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Transfers In (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Transfers Out (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Undertime (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Undertime (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Effective Agents (FTE) with training...	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Off-prem Shrink	6.2	6.2	6.1	6.1	6.0	5.9	5.9	5.8
AWOP (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
AWOP (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Scheduled Absent (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Scheduled Absent (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Vacation (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Vacation (FTE)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

398,260 tokens today

Current Context Queue Selected

Total (Forecast Sum)	\$3,084,098
Weekly Average	\$70,093
Periods Covered	44 weeks

The total forecasted people cost across the strategy is approximately **\$3.08 million**, averaging about **\$70,093 per week**. Let me know if you'd like a weekly breakdown or want to explore ways to reduce this cost!

06:10 PM

45,264 tokens

I need a way to reduce my people costs to be 2.8 million. How would I go about doing that while keeping my service as consistent as possible?
06:10 PM

Let me pull the current data across the key cost and service drivers to give you a well-grounded answer.Great question — you need to cut **\$284,098 (~9.2%)** from your current \$3.08M forecast. Here's a breakdown of the key levers available to you, ranked by impact and service risk:

Goal: Reduce Total People Costs from \$3.08M
→ \$2.8M

Target reduction: ~\$284,000 (9.2%)

Benefits of doing strategic planning well

Hugging the requirements curve means:

- Lower costs
- More consistent service delivery
- Appropriate abandons and customer experience
- Consistent occupancy and workload → lower attrition
- An easier WFM process

Plus!

- More business intelligence and what-if analytics
- Better, more accurate, and quicker decision-making. It's the canary in the coal mine!
- Fewer terrible meetings with the boss!



We'd love to chat!

- Let's connect!
- Live in 5
- Contact info:

Ric@RealNumbers.com

(410) 562-1217

- We'd truly would like to learn about your center and problems— we are happy to be a sounding board!
- Also, if you want to improve your cap planning process, call us!



CrmXchange Best Practices in WFO

Dave Hoekstra, Product Evangelist, Verint



Impact of the Hybrid Workforce on WFM Forecasting

Growth in IVA/Chat Bot “Containment”

2022

20%-30%

of routine customer interactions handled autonomously by IVAs/chatbots

Azumo

2025

65%-75%

of total routine call and chat volumes handled autonomously by IVAs/chatbots

NextPhone

2029

80%

of common customer service issues will be handled autonomously by Agentic AI

Gartner



Impact of AI and Agent-Assist Tools

14% to 60%

Reduction in Average Handle Time (AHT)
depending on complexity of the interaction

McKinsey & Company



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Long-Term Capacity Planning

- Factor in self-serve and channel shift trends
- Factor in changes to handle times – both from AI efficiencies and growing complexity of interactions.
- Validate hiring requests align with future workload and channel demands.
- Model and test scenarios before enacting them
- Analyze trade-offs, budget implications, and productivity outcomes



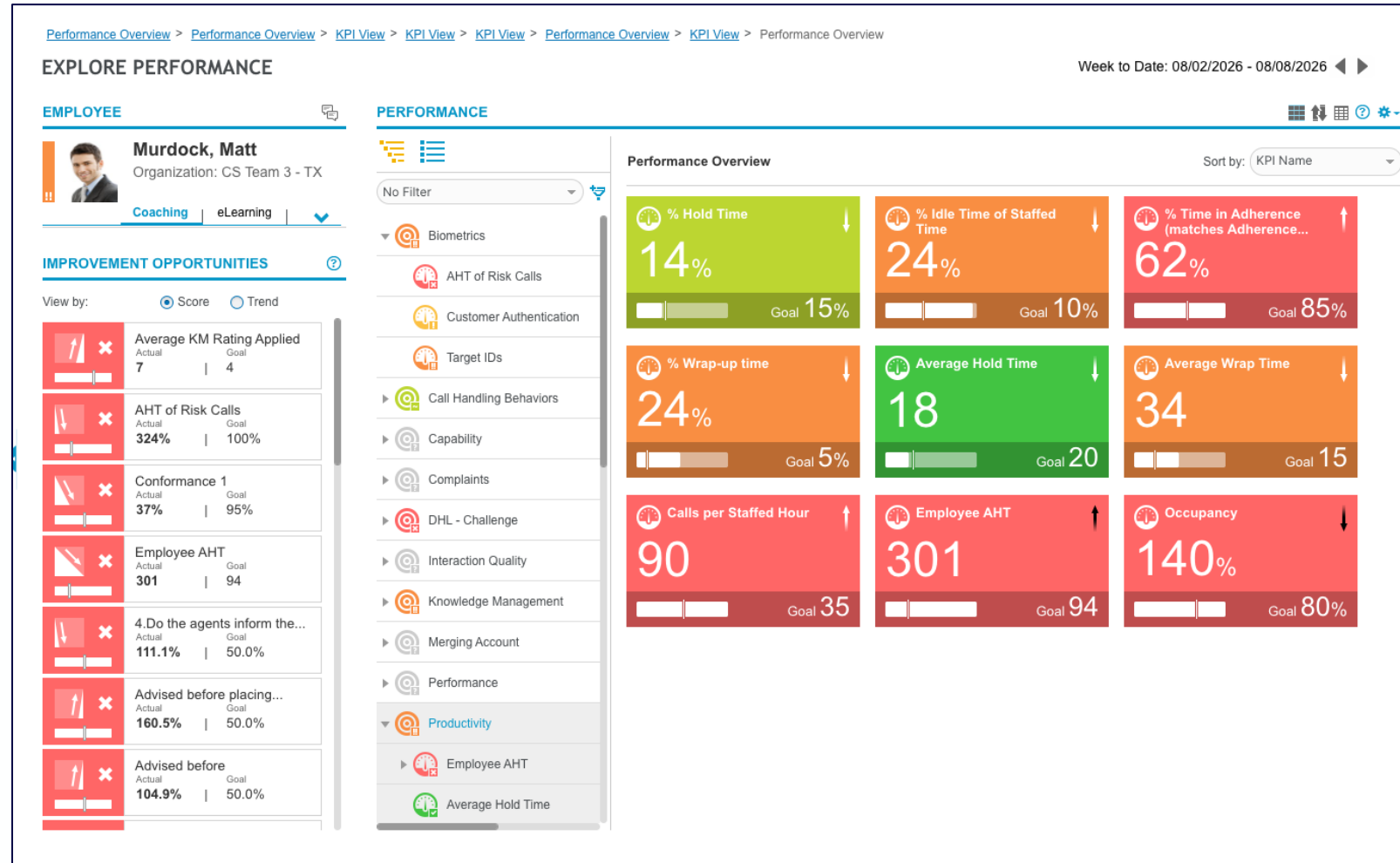


Integrated Performance Scorecards and Dashboards



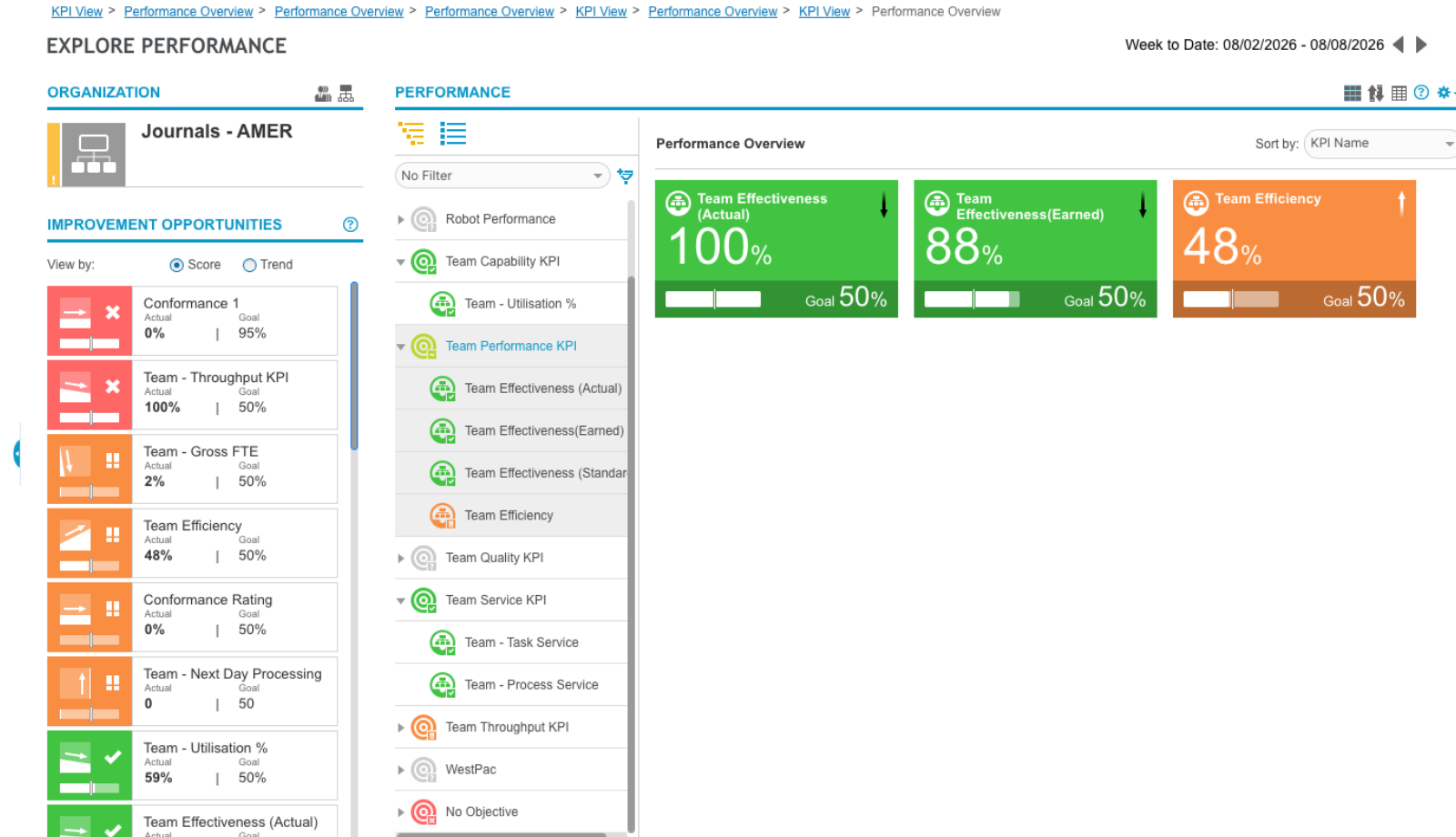
Expanded View of Performance Agent Scorecards

- Immediate Performance overview
- KPI Thresholds
- Easy to read dashboards



Expanded View of Performance Team/Department Dashboards

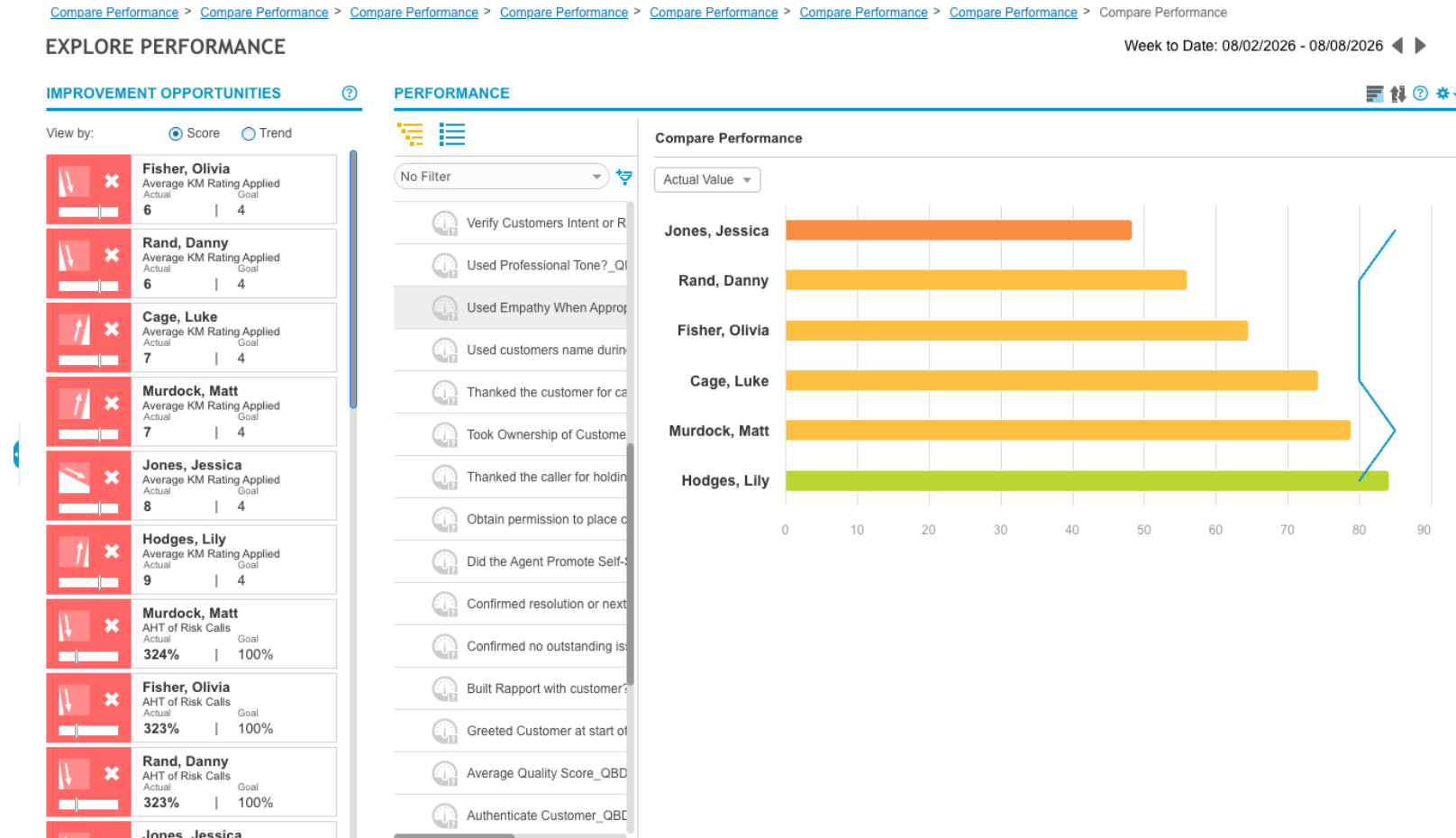
- Consolidate by Team/Org
- Team Gamification
- Org Dashboards



Expanded View of Performance

Comparative Dashboards by Role, Skill, KPI

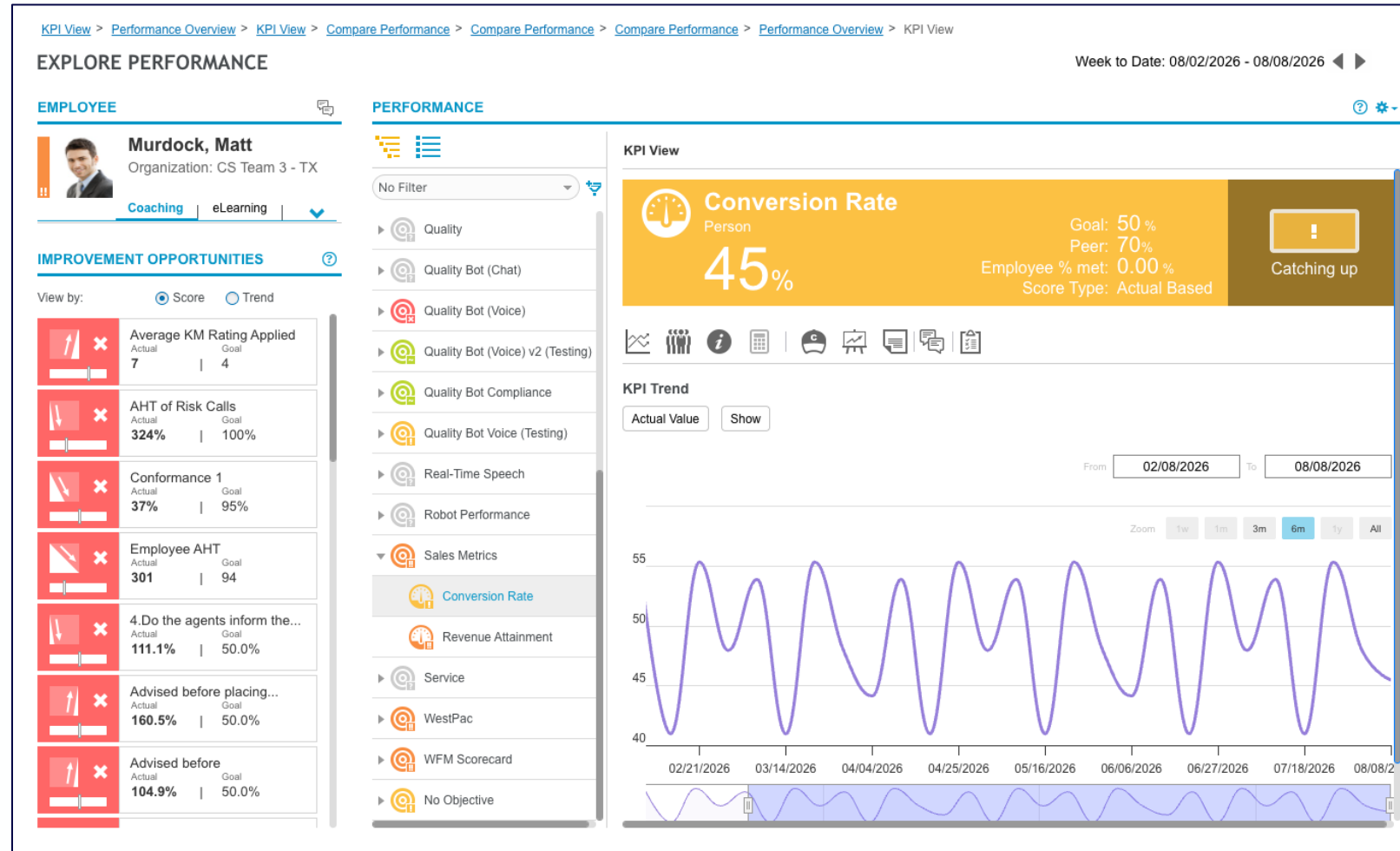
- True Performance Measurement
- Quick Schedule Coachings
- Drill Down or Up



Expanded View of Performance

Integrated with CRM, VOC, and other legacy systems

- CRM: Sales volume or upsells vs. quota
- VOC: Customer interaction satisfaction scores
- Easy to add external data

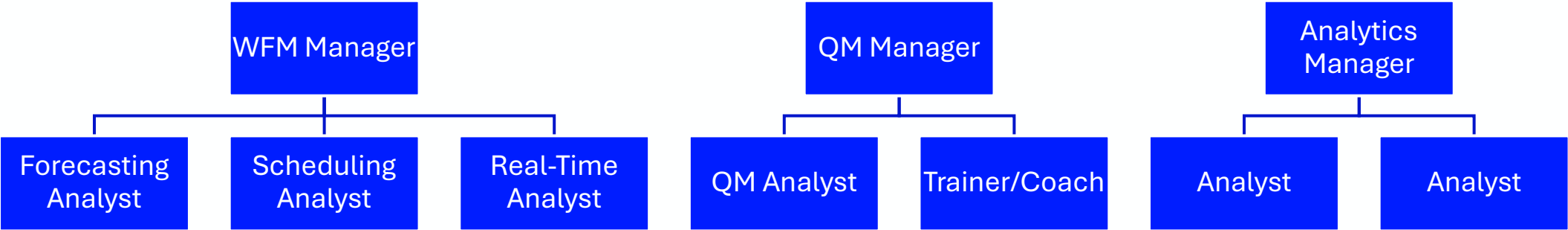




Create Synergies Across Old School Silos

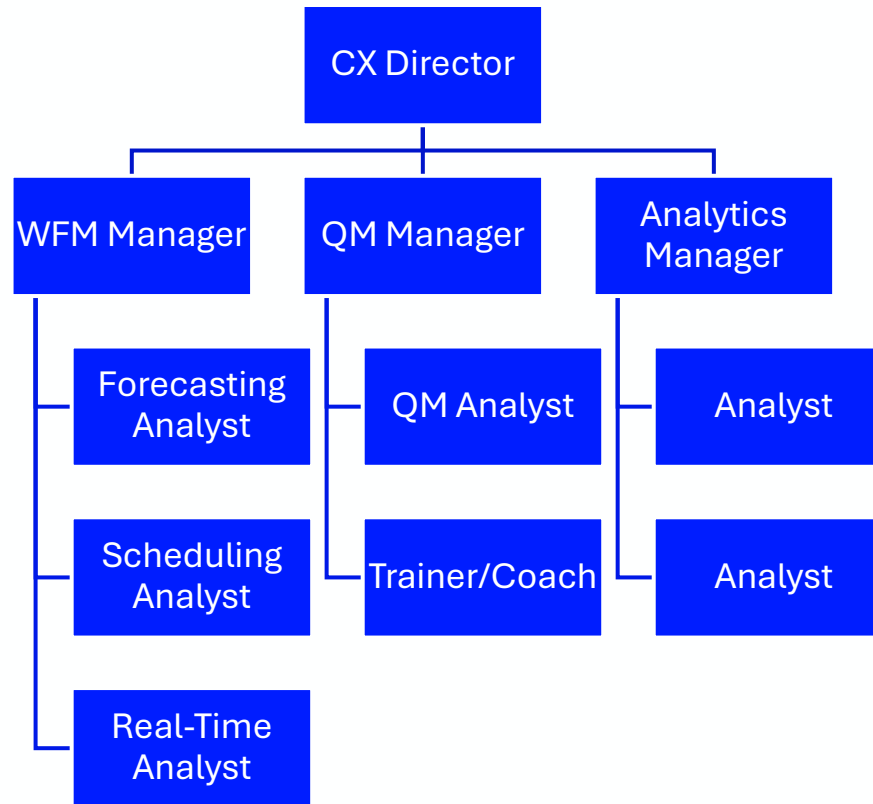


Old School Method

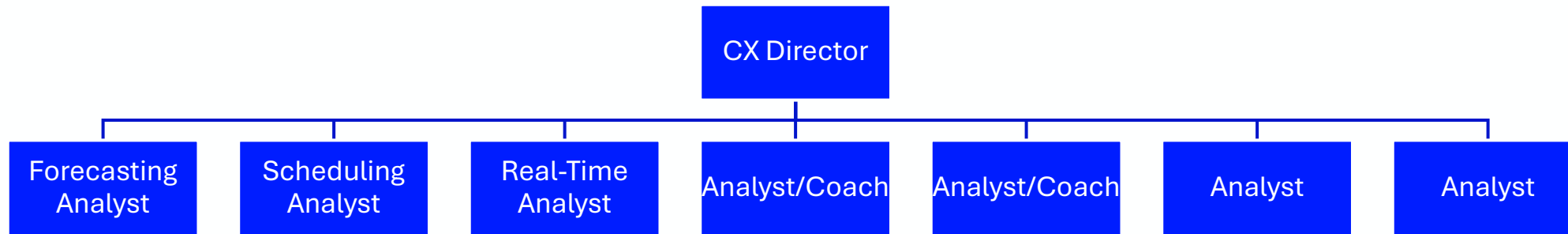


Semi New School Method

Everyone on the same team

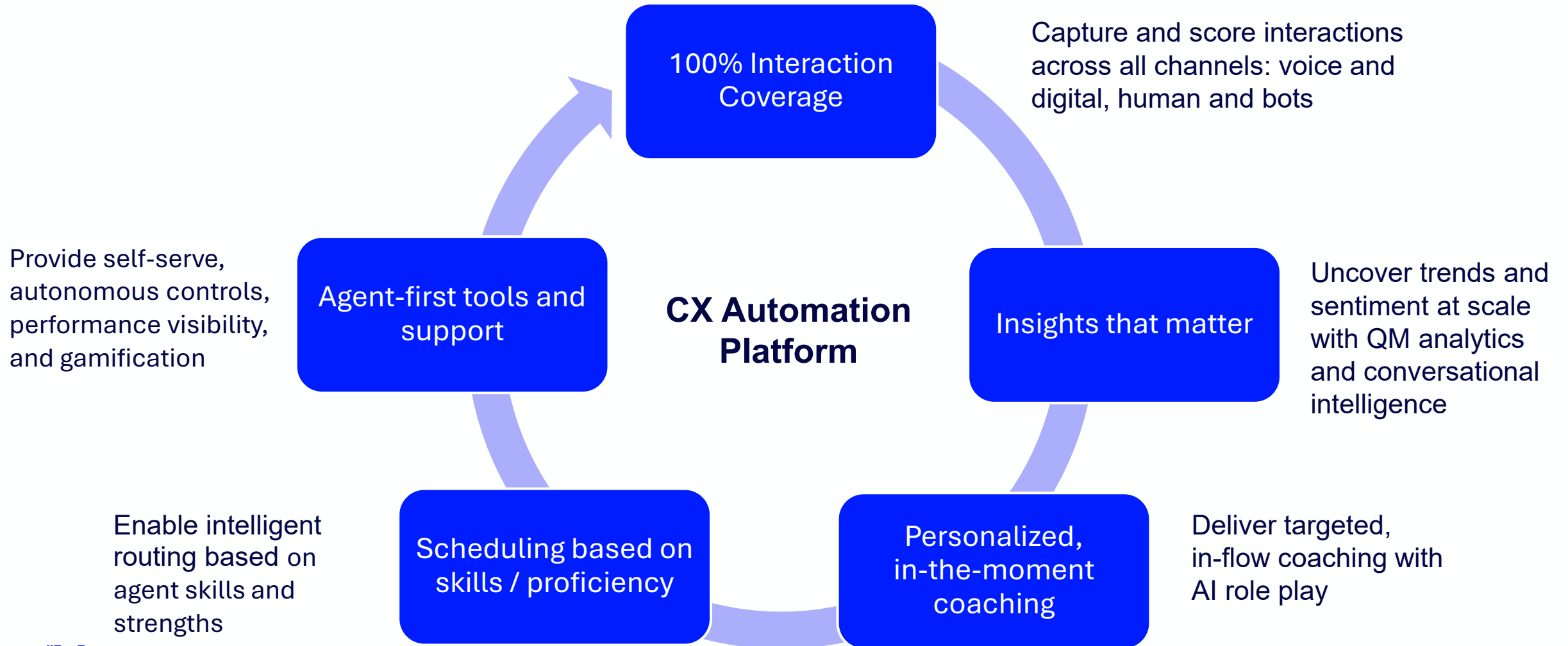


Next Level Method



Integrated Platform

Across QM, WFM, Analytics, VOC, CRM and more



Key Takeaways

Hybrid Agent Workforces
and strong LTCP lead to
efficiencies we never
thought possible

Performance Management
and Scorecards are the
kickstarter to strong agents
and teams

Removing traditional silos
by combining legacy teams
will lead to synergy and
removes firewalls





Thank you



BEST PRACTICES IN WORKFORCE OPTIMIZATION



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Senior
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**Ric Kosiba,
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