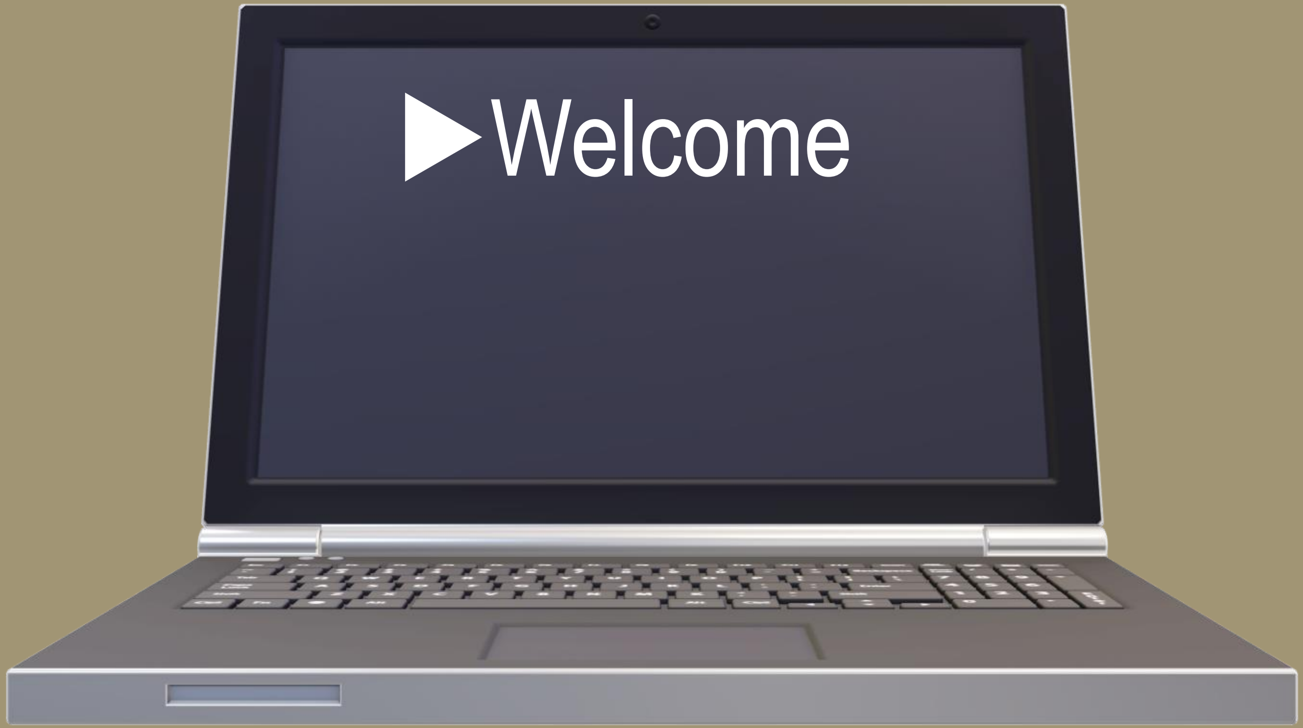
ROUNDTABLE:
PREPARING FOR THE FUTURE OF WFM

Andrea Matsuda, Head of Product Marketing, Workforce Management, NICE

Trudy Cannon, Senior Director Verint® Workforce Engagement Management Solutions



Preparing for the Future with Workforce Management

2025

Andrea Matsuda,
Sr. Product Marketing

Agenda

- Market Trends
- Challenges with digital and back-office WFM planning
- NICE's take
- The evolving role of the employee in the WFM process
- Key take-aways

Last Year Contact Center Trends.
What do you think are the trends for this year?

69%

Of organizations have a hybrid work model

22%

Share work between the front and back office

56%

Increase in digital channels over the past year

?%

of agents handle voice and digital channels concurrently most of the time

Contact Center Trends going into 2025

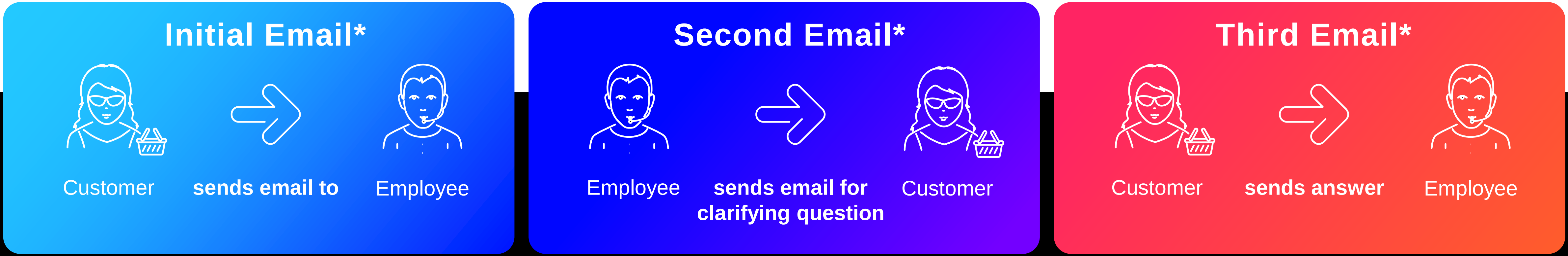
64%
Of organizations have a hybrid work model

44%
Share work between the front and back office

60%
Increase in digital channels over the past year

75%
of agents handle voice and digital channels concurrently most of the time

Challenges with Long Asynchronous Interactions



Initial Email*

Customer **sends email to** Employee

Second Email*

Employee **sends email for clarifying question** Customer

Third Email*

Customer **sends answer** Employee

2 mins For Employee to read initial email

5 mins For Employee to type & send back questions to customer

3 mins For Employee to read customer response and resolve

60 mins delay in response

Customer sends answers 1h later

Business problem:
was this…

A One contact that lasted 10 minutes?

B One contact that lasted 70 minutes?

C Three separate contacts?

which interval should the information be reported?

1 When the contact started

2 When the contact ended

3 In each interval work was performed

** The example is "email"; other examples include SMS, social media posts, chat, claims, tickets, cases, etc.*

True to Interval (TTI)

Synchronous & Asynchronous Work Item Deconstruction

Today’s Paradigm

“When Contact Ended” (WCE) paradigm

- A contact is counted once in the interval in which it ends…even if the contact spanned intervals
- Handle Time is reported only in the interval in which contact ends

Example. Contact Arrives at 9:10am & Completes at 9:40am

Interval	Received	**Handled** (completed)	Handle Time **(WCE)**	Staff Req
9:00 am	1	0	0	**0** ⊗
9:15 am	0	0	0	**0** ⊗
9:30 am	0	1	30	**2** ⊗

Use when…
- most contacts arrive and complete in the *same* interval (synchronous)
- intervals are *longer* than the handle times

Creates staffing problems when…
- handle times are long or intermittent and contacts span intervals
- intervals are shorter than the handle times

Invented Paradigm

“Answered & Active True to Interval" (A&A TTI) paradigm

- A contact is counted once in the interval in which it is initially answered
  If the contact spans intervals, it is counted again in each subsequent interval where activity occurred
- Handle Time is reported in each interval in which work activity occurs

Example. Contact Arrives at 9:10am & Completes at 9:40am

Interval	Received	**Answered**	**Active**	Handle Time **(TTI)**	Staff Req
9:00 am	1	**1**	**0**	5	**.33** ✓
9:15 am	0	**0**	**1**	15	**1** ✓
9:30 am	0	**0**	**1**	10	**.67** ✓

Use when…
- contacts arrive and are completed in *any* interval (synchronous or asynchronous)
- Intervals are *shorter or longer* than the handle times

Solves staffing problems when…
- handle times are long or intermittent and contacts span intervals
- intervals are shorter than the handle times

Result of Doing Digital Right

Accurate digital staff requirements

Efficient schedules against digital demand

Consistent service across all channels

Improved employee experience

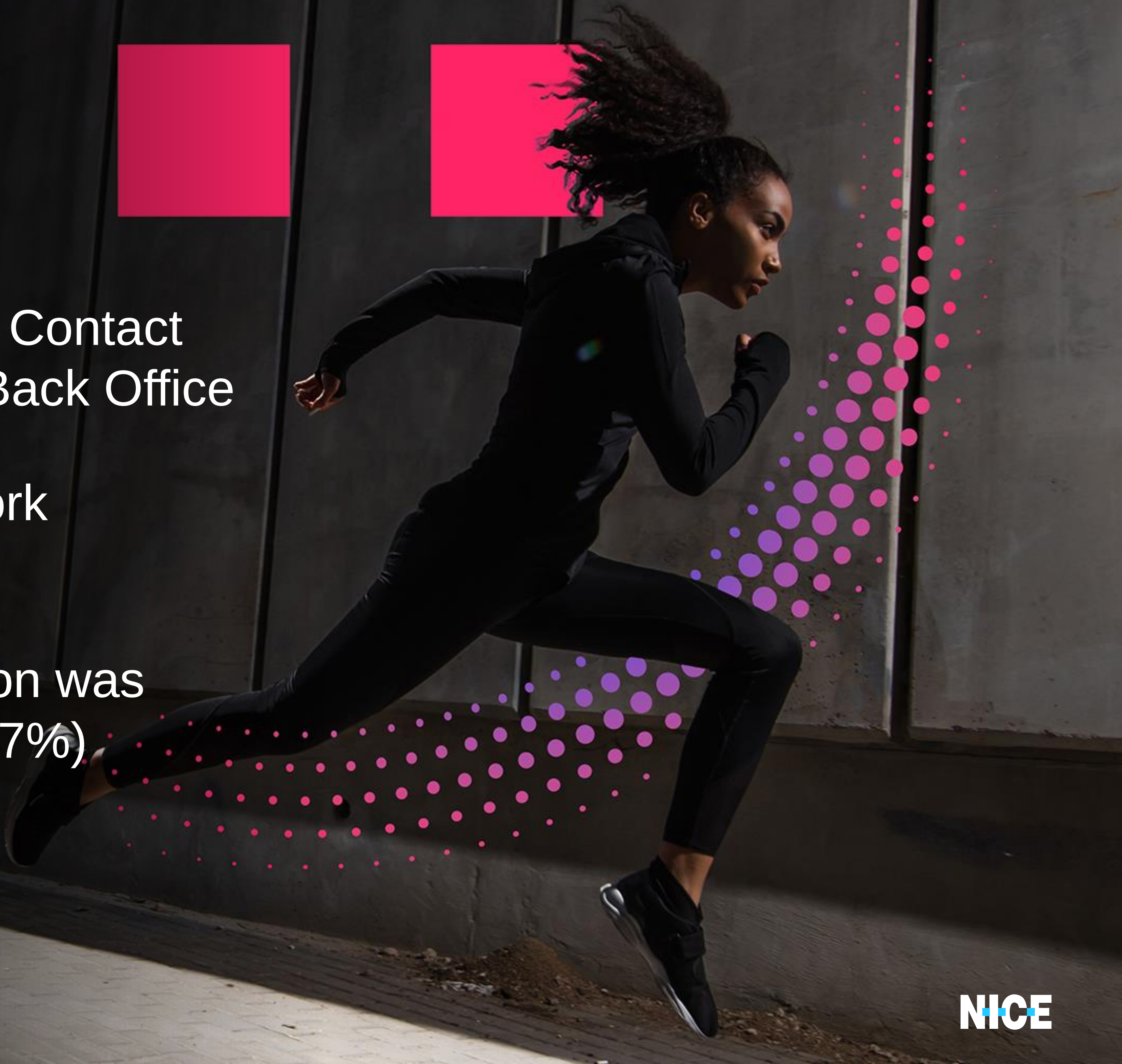
Agent concerns don’t exist in a silo – they impact business goals:

Costs, Turnover, CSAT and Productivity

The Average Attrition Rate in a Contact Center 2023 Was **49%!** Up from 38% in 2022!

What do you think the attrition was on average in 2024?

The Average Attrition Rate in a Contact Center 2024 Was **39%**



Attrition is 4.75% higher in Contact Centers compared to the Back Office

41% of agents attribute work stress to voluntary attrition

Back Office average attrition was 34% in 2024 (down from 47%)

What are you doing to retain your employees?

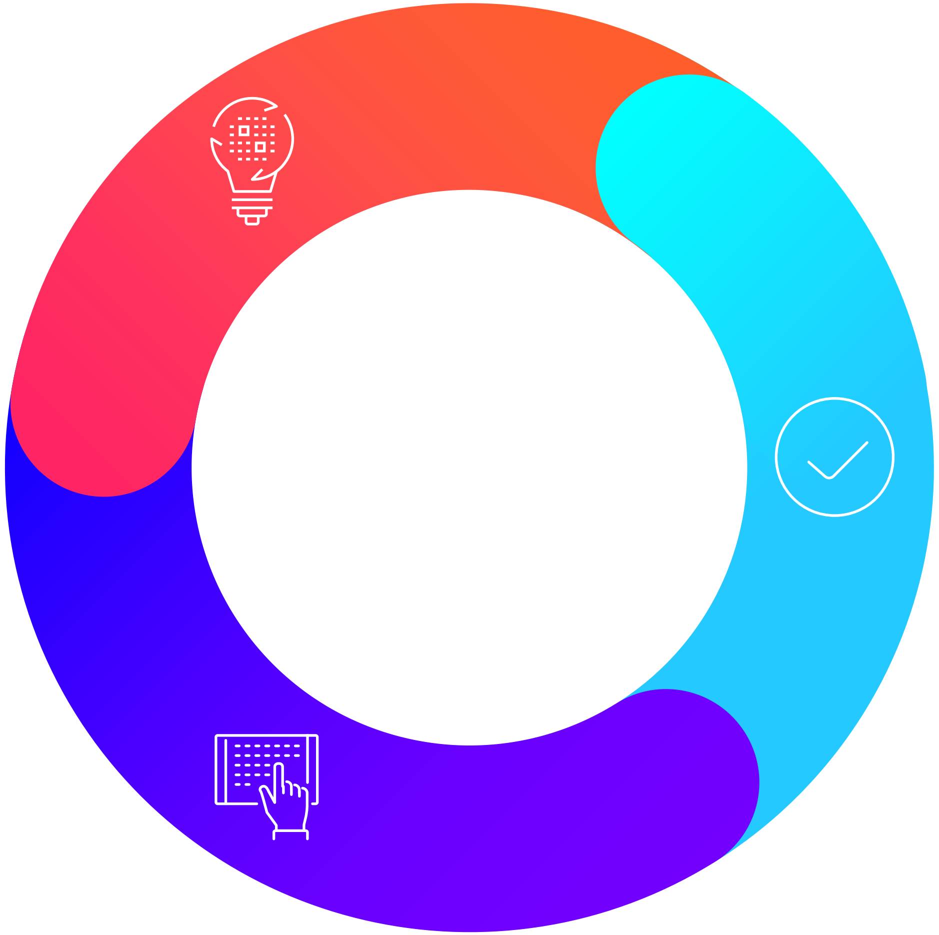
NICE Leads with Innovation Providing Agility for the Agents Throughout the Scheduling Process

Before the schedule is created

- Agents set their availability while ensuring business needs will be met (a parameter of the schedule optimization)
- Agents set their preferences which will be applied after schedules are optimized

During the schedule creation process

- Self-scheduling (PTO, holidays, fair day volunteer, etc.)
- Hybrid (mixed mode) scheduling
- Cognitive load optimizer
- "Bring Your Own Schedule"



After the schedule is published

- Self-swaps with auto-approval
- Powerful trading options with auto-approval
- Extra Hours & VTO offers with auto-approval
- Automatic adjustments of breaks and lunches

Bring Your Own Schedule

Rules-driven parameters guide employees to create their own schedules

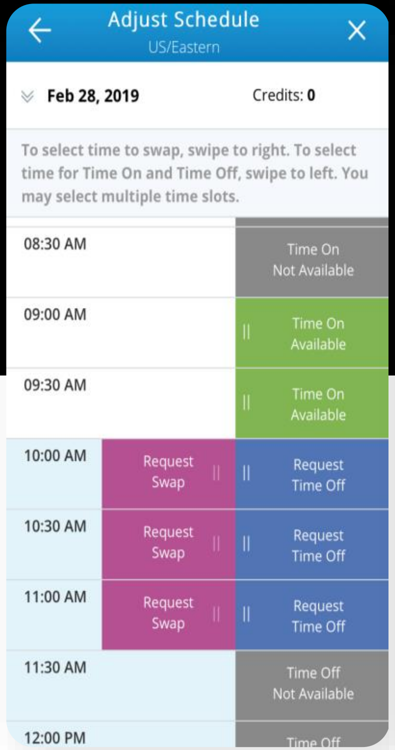
Benefits:

•

•

•

Make Employees WFM Partners



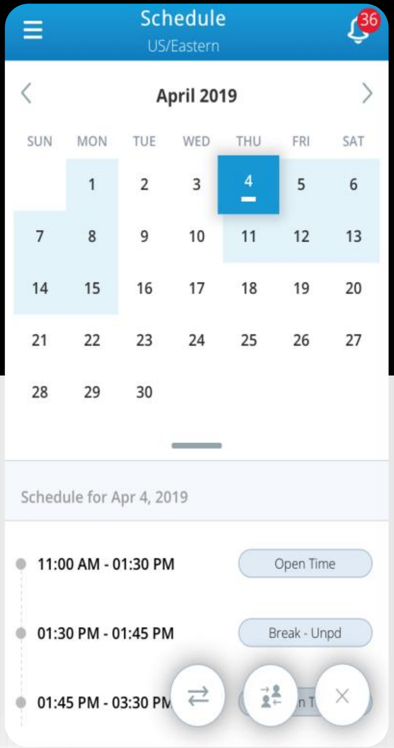
Adjust Schedule
US/Eastern

Feb 28, 2019 Credits: 0

To select time to swap, swipe to right. To select time for Time On and Time Off, swipe to left. You may select multiple time slots.

08:30 AM		Time On Not Available
09:00 AM		Time On Available
09:30 AM		Time On Available
10:00 AM	Request Swap	Request Time Off
10:30 AM	Request Swap	Request Time Off
11:00 AM	Request Swap	Request Time Off
11:30 AM		Time Off Not Available
12:00 PM		Time Off

Employees Visibility into Staffing needs



Schedule
US/Eastern
36

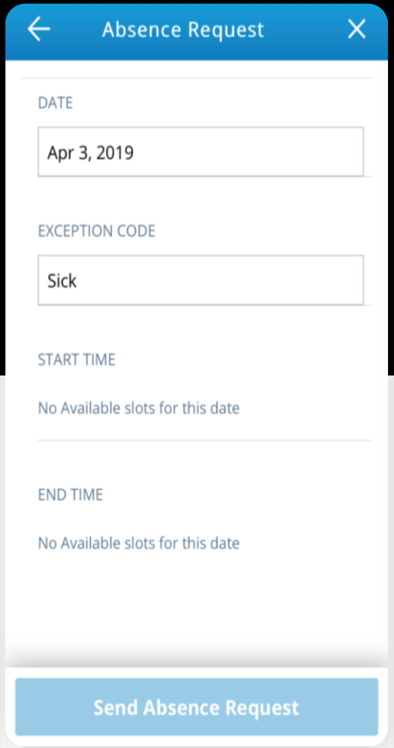
April 2019

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Schedule for Apr 4, 2019

11:00 AM - 01:30 PM	Open Time
01:30 PM - 01:45 PM	Break - Unpd
01:45 PM - 03:30 PM	

Secure Mobile Access to Schedule View*



Absence Request

DATE
Apr 3, 2019

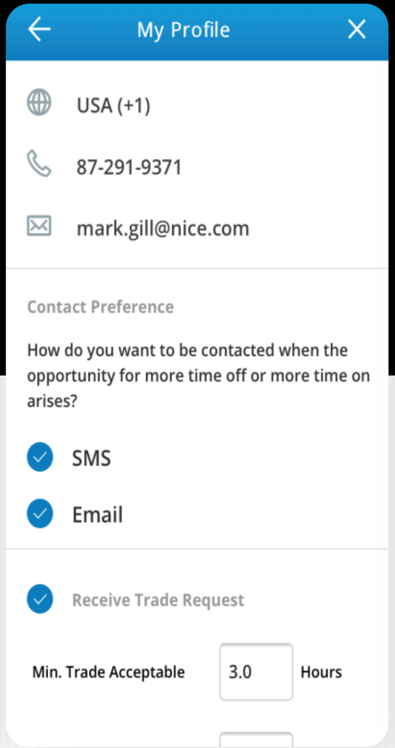
EXCEPTION CODE
Sick

START TIME
No Available slots for this date

END TIME
No Available slots for this date

Send Absence Request

Request Absence easily and update WFM Automatically



USA (+1)
87-291-9371
mark.gill@nice.com

Contact Preference

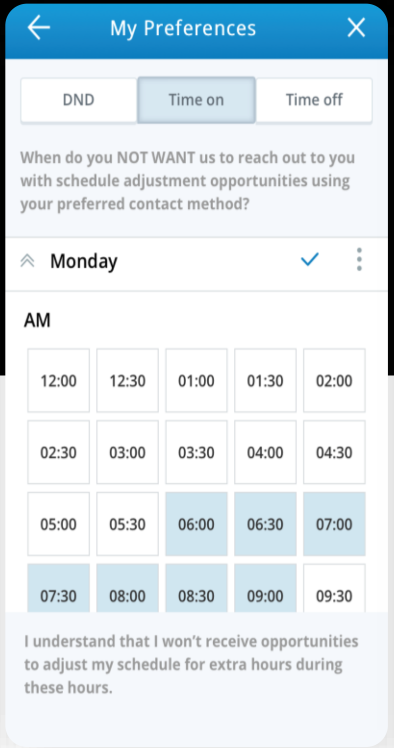
How do you want to be contacted when the opportunity for more time off or more time on arises?

☑ SMS
☑ Email

☑ Receive Trade Request

Min. Trade Acceptable 3.0 Hours

Employees Controlled Contact Preferences



My Preferences
DND
Time on
Time off

When do you NOT WANT us to reach out to you with schedule adjustment opportunities using your preferred contact method?

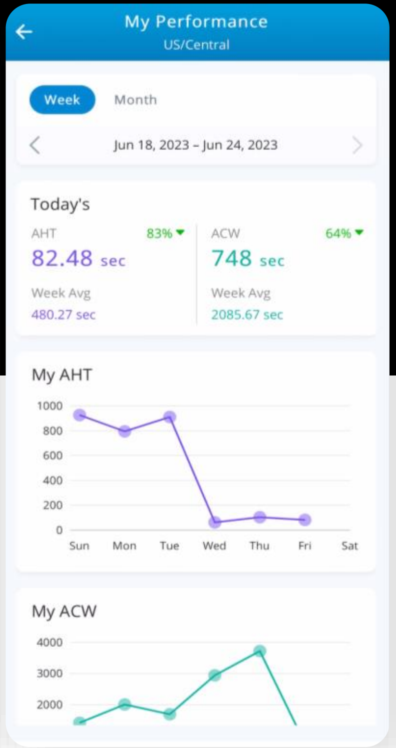
Monday ✓

AM

12:00	12:30	01:00	01:30	02:00
02:30	03:00	03:30	04:00	04:30
05:00	05:30	06:00	06:30	07:00
07:30	08:00	08:30	09:00	09:30

I understand that I won't receive opportunities to adjust my schedule for extra hours during these hours.

Employees Controlled Time On / Time Off / DND Preferences



My Performance
US/Central
Week
Month

Jun 18, 2023 – Jun 24, 2023

Today's

AHT 83% ▼
82.48 sec
Week Avg
480.27 sec

ACW 64% ▼
748 sec
Week Avg
2085.67 sec

My AHT
1000
800
600
400
200
0
Sun
Mon
Tue
Wed
Thu
Fri
Sat
My ACW
4000
3000
2000

Performance Mobile View

SSO and Bio-Authentication *

CVS Caremark

About

CVS Caremark is part of the CVS Health family as a pharmacy benefit manager (PBM). As a PBM, we work with employers, health plans, unions, and state and local governments nationwide in managing prescription plans that help control costs while ensuring access. Our contact center colleagues work with members to get affordable medications when and where they need them. Once a member gets their medication, CVC Caremark provides the tools, services, and support to keep them on track.

NICE Solutions

- NICE Workforce Management
- NICE Employee Engagement Manager
- NICE Value Realization Services

3800
Schedule changes handled by EEM daily

Challenge

With 6,500+ Customer Care colleagues and 24/7 operations, CVS Caremark was utilizing a manual request process for scheduling changes. Due to the delays this process caused in approval, the team faced frequent schedule and workforce misalignment around known call patterns. CVS Caremark needed to improve colleague flexibility in scheduling while freeing up workforce managers for analysis instead of manual transactions.

Solution

CVS Caremark began utilizing the EEM and rolled the tool out to the entire team in phases. Nearly 97% of eligible employees registered, and there has been a significant increase in colleague satisfaction and retention. Workforce analysts are now more consultative and forward-looking, and the contact centers are seeing more consistent customer experience. EEM will continue to ease colleagues' and supervisors' workloads by intelligently matching schedule change options to individual team members, leveraging AI to adjust schedules on the fly.

Big Increases

97% of eligible colleagues using EEM

39.9% increase in positive colleague sentiment related to scheduling

17.9% improvement in scheduling efficiency

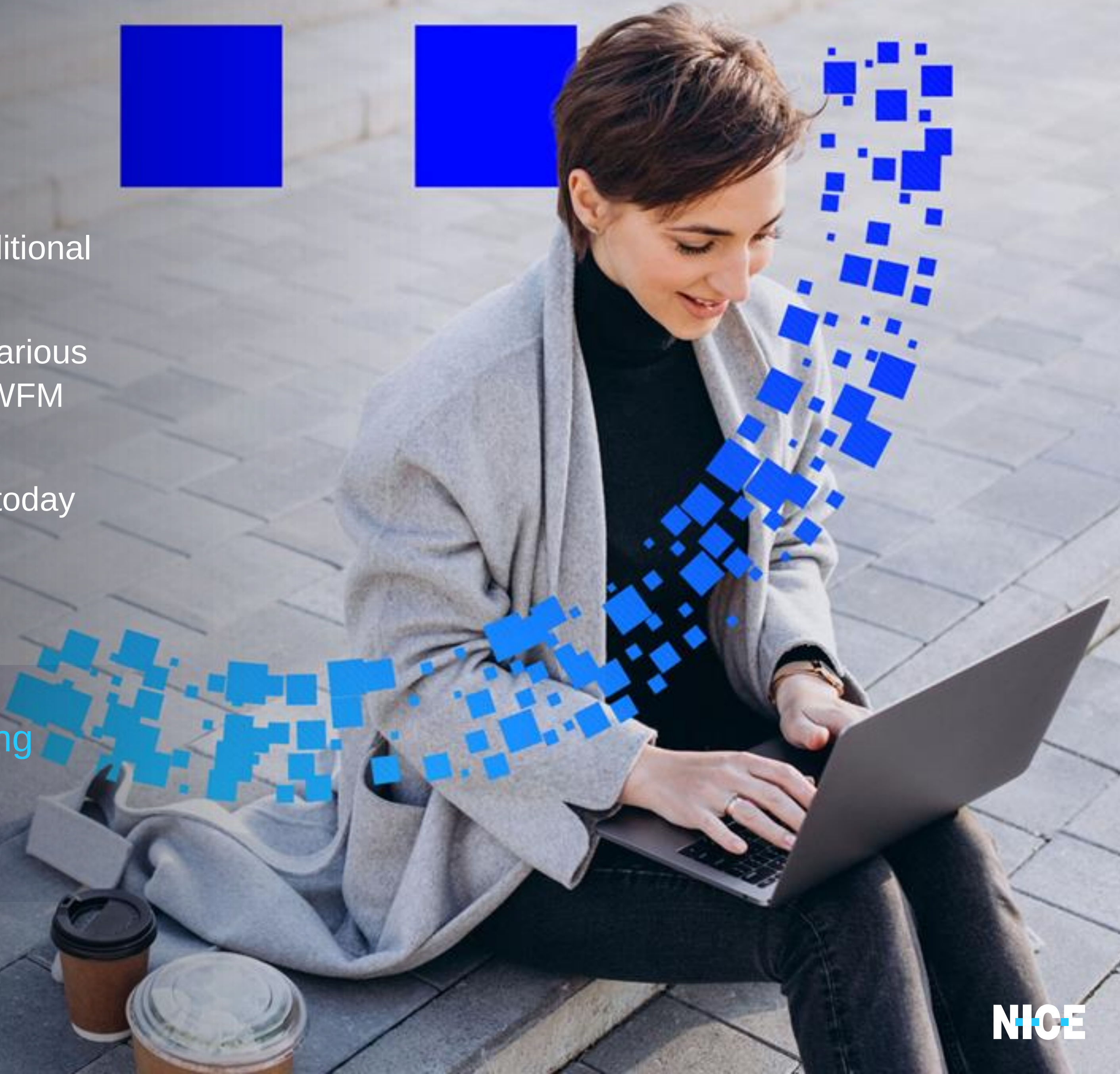
> *"We've been told colleagues aren't interested in looking at other contact centers for roles because those contact centers don't have EEM.* ***Having EEM is one of the reasons our team is staying with us."***
>
> – Chris Meehan, Director of Workforce Planning, CVS Caremark

Key Takeaways

The Nature of Work Keeps Changing!

- Digital and asynchronous work has disrupted traditional WFM practices
- Contact Centers are blending resources across various channels, including the back office, this impacts WFM planning and the employee's cogniative load
- WFM practices must adapt to meet the needs of today and tomorrow's workforce
- Great EX equals Great CX!

Employee empowerment with self-scheduling and proper workload allocation can lower your unplanned attrition and shrinkage



Aria
Vdara
GUCCI
FENDI
PRADA
DOLCE&GABBANA

NICE | interactions

June 16-18, 2025 | Las Vegas

REGISTRATION IS OPEN

Thank You

NICE

Make
experiences
flow

Preparing for the Future of WFM

Trudy Cannon, Senior Director – GTM Strategy

February 27, 2025

VERINT

Audience Poll

What interaction types does your contact receive?

Audience Poll

Do you forecast and schedule for all of them in your WFM solution?

The Customer Journey and Omni-Channel Work

- More interactions are starting in non-voice, digital channels, but fewer being resolved there
- Need to consider how this journey impacts handle times along with the forecast for other interactions

77%

of all interactions use voice, either initially or as an escalation

Source: Metrigy

How Do I Prepare for the Future?

Plan for asynchronous impacts

Chat and messaging may impact the amount of phone work

Plan for agent interaction to become more complex

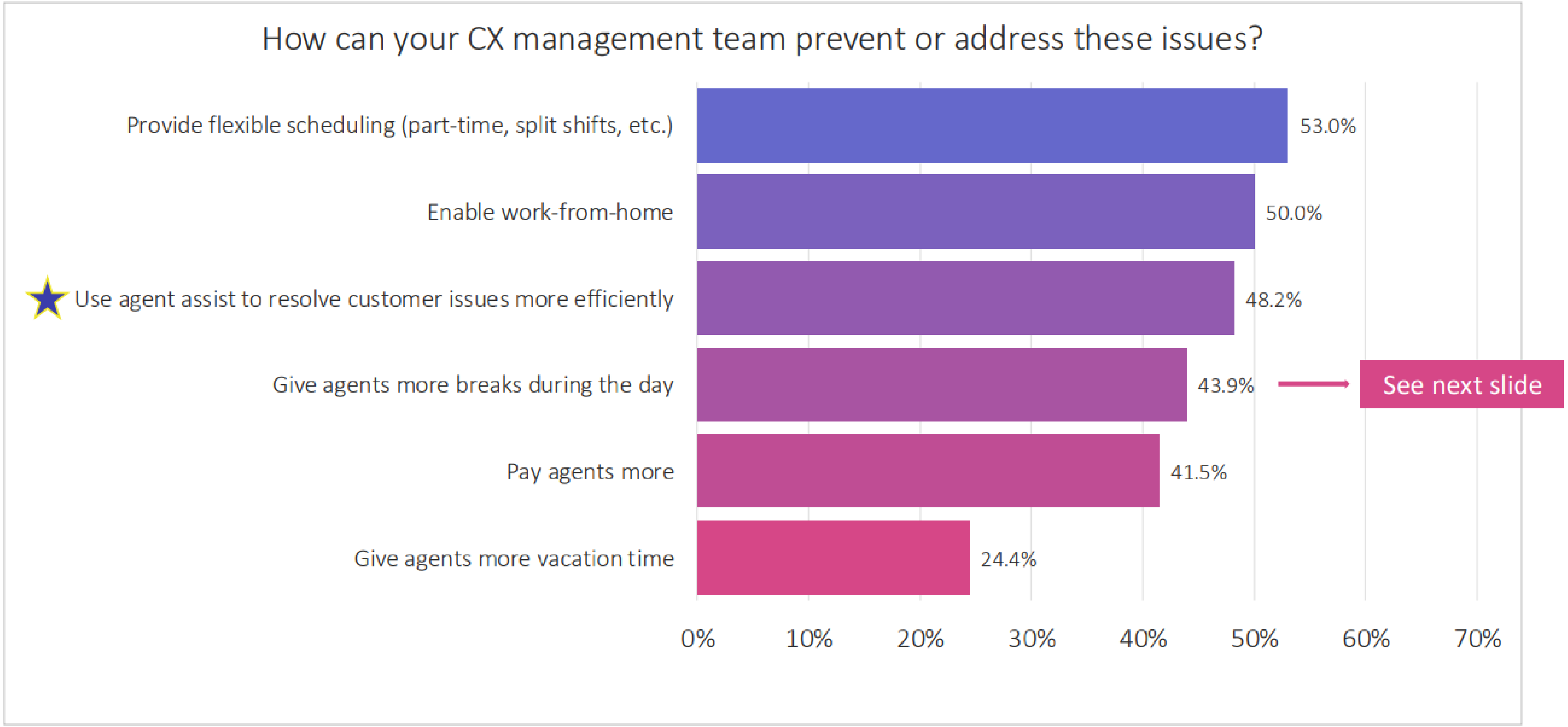
Equip employees with the right tools

You need an AI-driven WFM tool to uncover and plan for these impact!

You can’t do this on the back of a napkin!

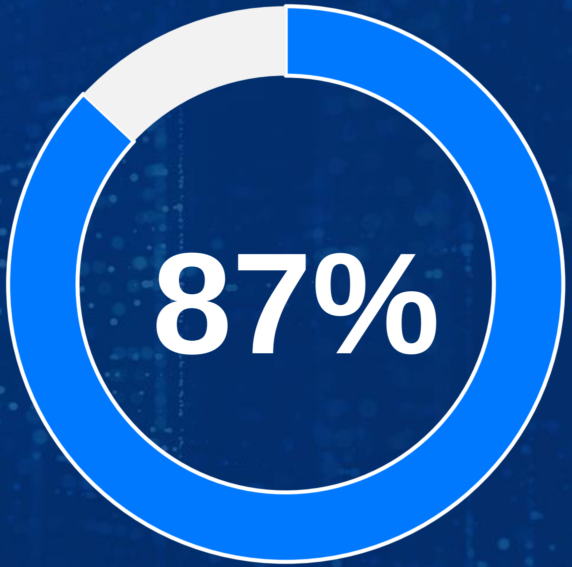
Employee Health and Wellness

Schedule Flexibility: Top Way to Prevent Fallout from Complexity Overload


How can your CX management team prevent or address these issues?

Source: Metrigy

Employee Health and Wellness



of agents report high or very high stress levels at their contact center

Challenges:

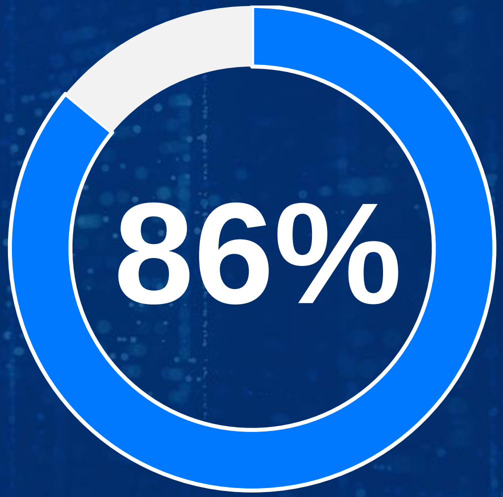
- Employees will make their own “breaks” when busy
- Those “breaks” are not scheduled at the most optimal time

Solution:

- **Schedule 5-minute wellness breaks**

Source: Jive

New Customer Journey Requires New Agent Tools



of agents feel that they don’t have the resources or the authority to deal with customers effectively

Employees Want:

- Easy ways to communicate with managers
- Quick responses to inquiries
- Performance transparency

Source: Jive

Preparing for the Future

The customer journey is driving the evolution of WFM practices

Omni-channel Work

You need an AI-driven WFM tool to plan for all work including customer journey impacts

Employee Health and Wellness

Schedule 5-minute wellness breaks at the most optimal time

Provide the Right Employee Tools

Interactions will become more difficult so providing employees with the right tools is critical to their success

You Need the Best WFM for your Business

Delivers highest levels of accuracy and workforce flexibility

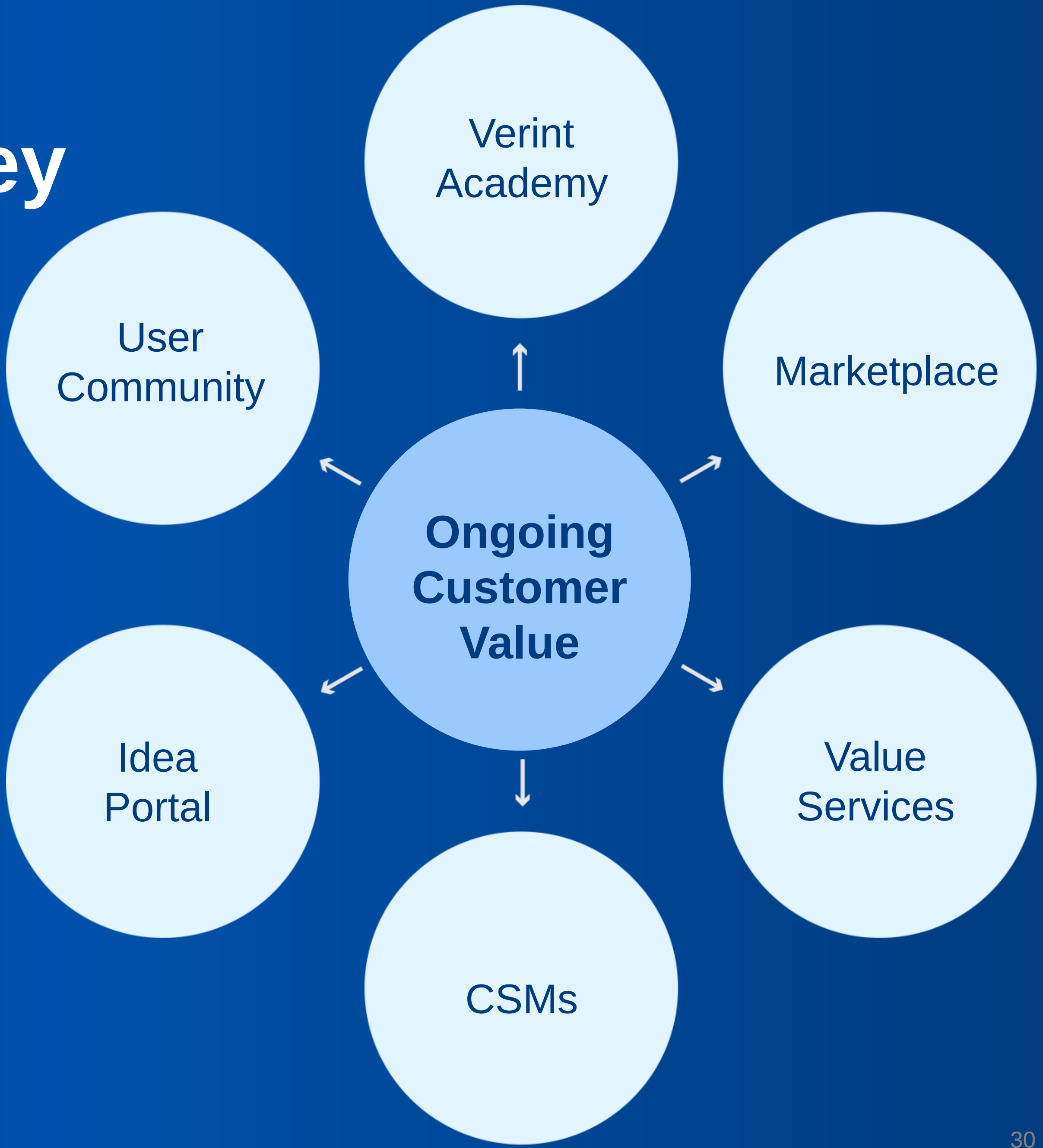
Best of breed WFM delivers the right forecasts and schedules which translate to millions of dollars in savings

Best of breed WFM delivers agent work-life balance which translates to significant improvement in EX and retention

AI-powered WFM delivers strong AI Business Outcomes, Now!

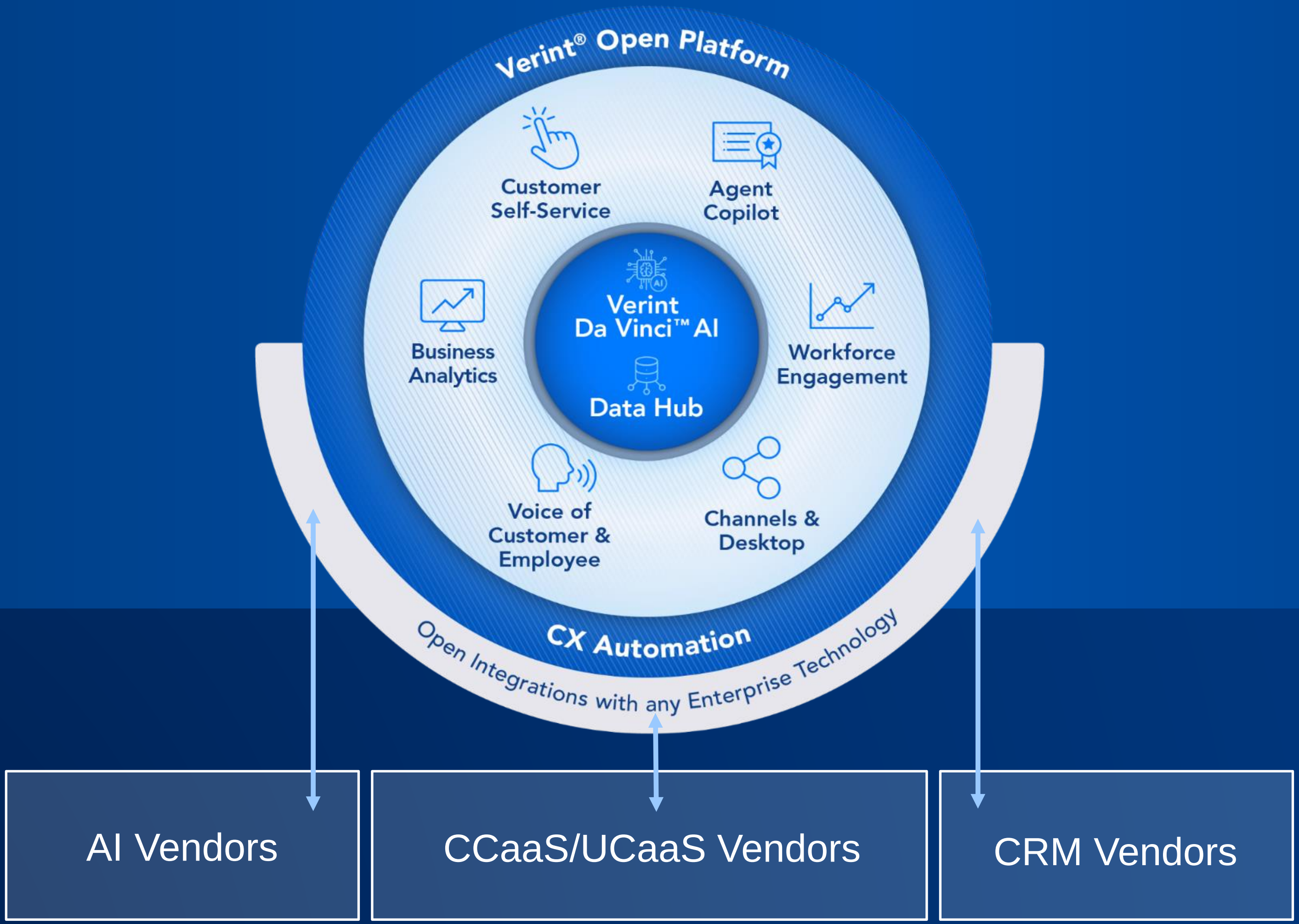
Committed to Success at Every Step of Your Journey

Verint helps customers achieve **ongoing value** through a range of programs and offerings


Verint Academy
User Community
Marketplace
Ongoing Customer Value
Idea Portal
Value Services
CSMs

Easily Add Verint CX Automation Without Disruption

Verint Open Platform seamlessly fits into your existing ecosystem


Verint® Open Platform
Customer Self-Service
Agent Copilot
Business Analytics
Verint Da Vinci™ AI
Data Hub
Workforce Engagement
Voice of Customer & Employee
Channels & Desktop
CX Automation
Open Integrations with any Enterprise Technology
AI Vendors
CCaaS/UCaaS Vendors
CRM Vendors

Verint offers everything you need to automate your manual CX workflows

No changes required

Speaker Contact

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LinkedIn

Thank You

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