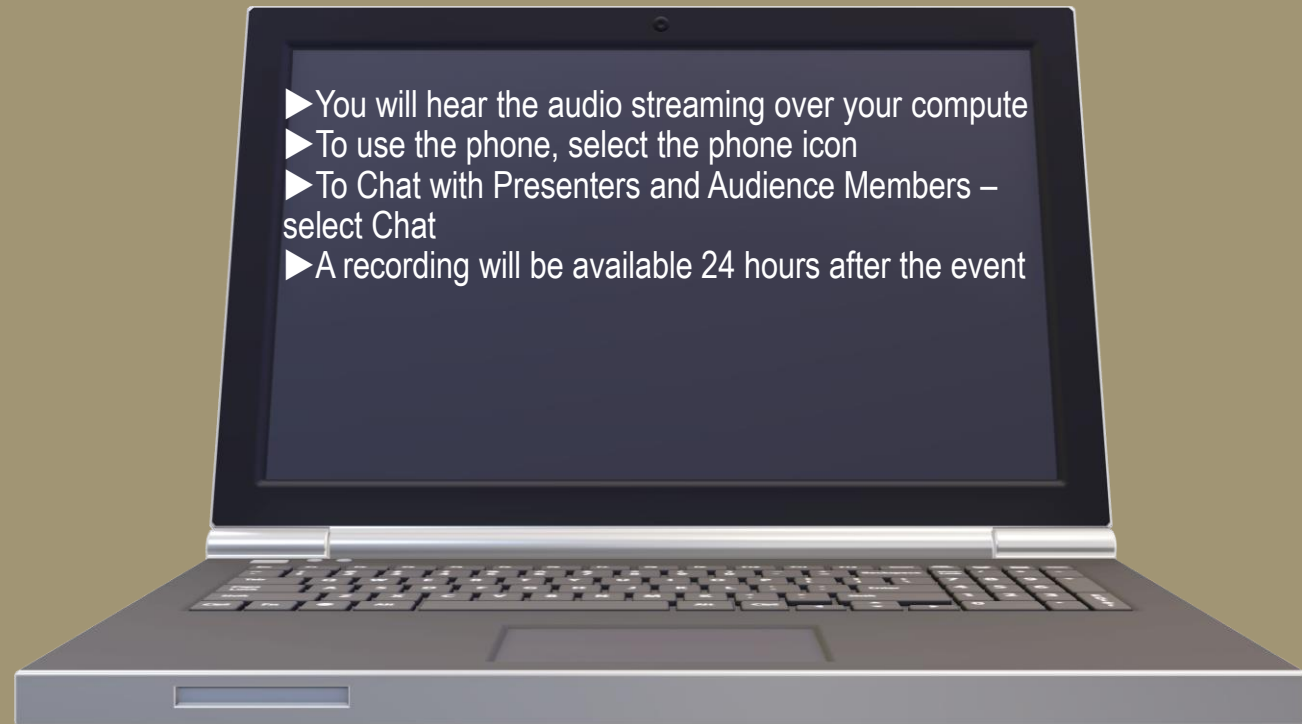


# PREPARING FOR THE FUTURE OF WFM

**Andrea  
Matsuda,  
Senior Product  
Marketing  
Manager, NICE**

**Michael  
Wroblewski,  
Sr. Director,  
Solution  
Consulting,  
Verint**



- ▶ You will hear the audio streaming over your compute
- ▶ To use the phone, select the phone icon
- ▶ To Chat with Presenters and Audience Members – select Chat
- ▶ A recording will be available 24 hours after the event



# Preparing for the Future with Workforce Management

CrnXchange Webcast  
February 22, 2024

Andrea Matsuda,  
Sr. Product Marketing



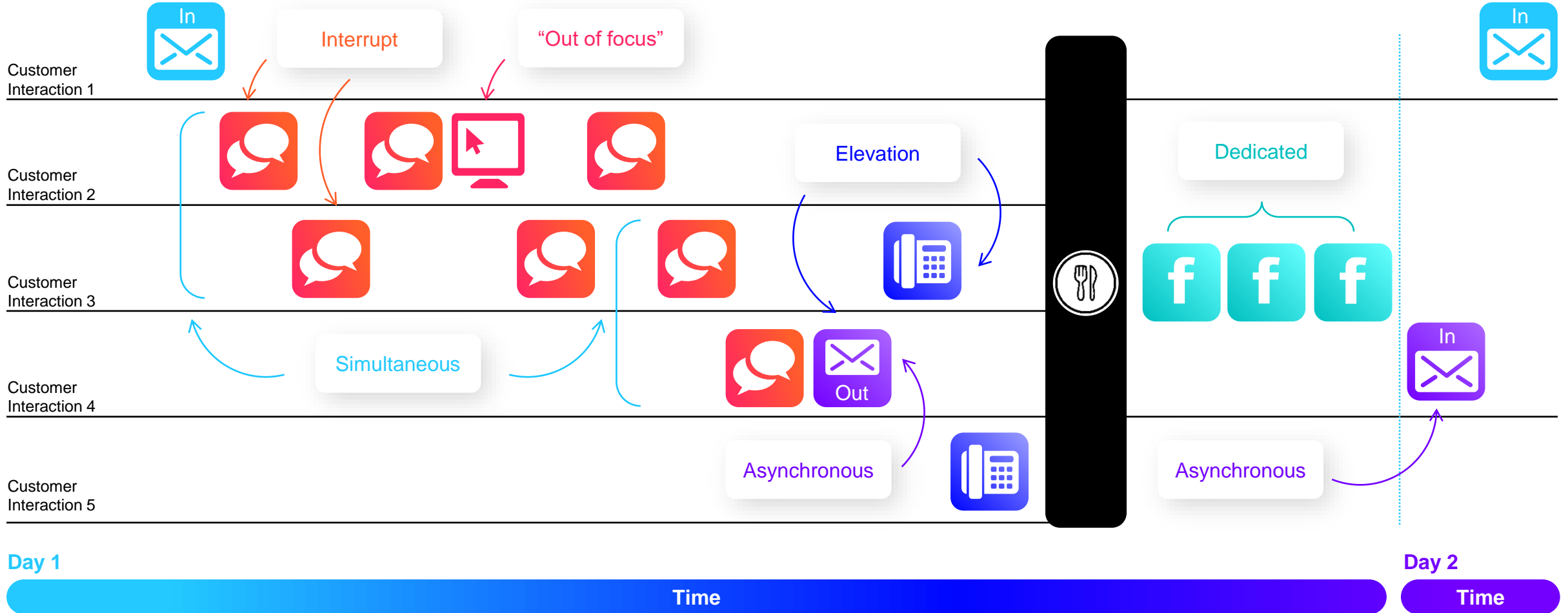


# Agenda

- The Nature of Work Has Changed
- Challenges with Long Duration and Asynchronous Work
- NICE's Take
- The Role of the Employee in the WFM Process
- Key Take-Aways

# The Nature of Work has Changed

...a series of blended transactions handled by a single employee across many communication channels



# Contact Center Trends in 2024



**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 two years



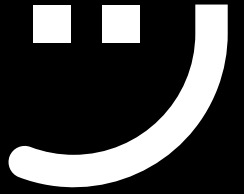
**75%**

of agents handle voice and digital channels concurrently

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



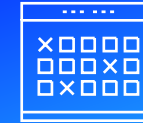
# Understanding the Pain of Treating Digital Channels Too Simplistically



Inaccurate  
long-range planning



Inefficient  
schedules



**RESULT:**

DECREASED CSAT  
INCREASED COSTS,  
OR BOTH

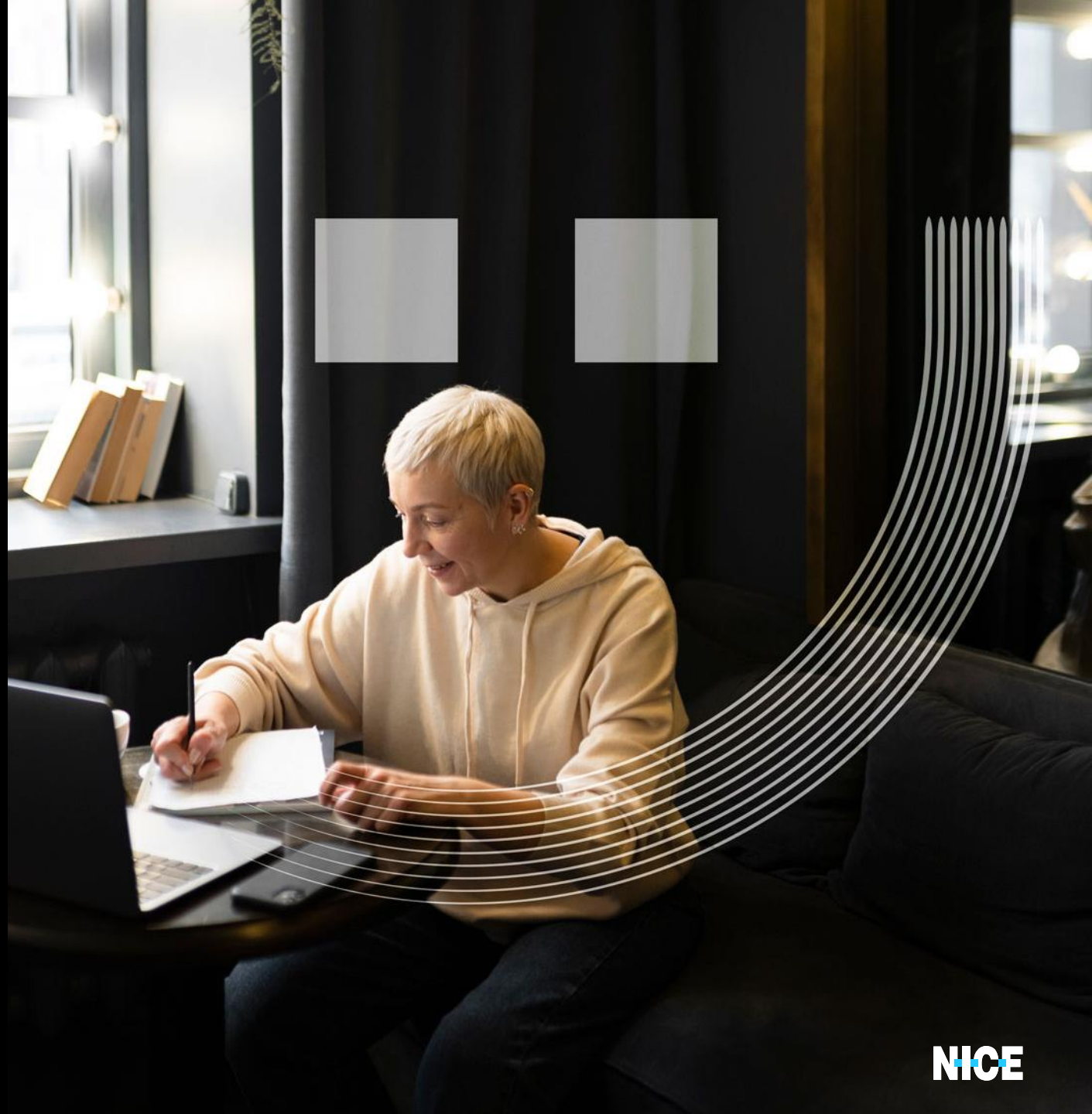
Inaccurate  
requirements from  
forecast



Changes become  
painful to ensure skills  
and channels are both  
covered



# Long Duration Work and Asynchronous Work





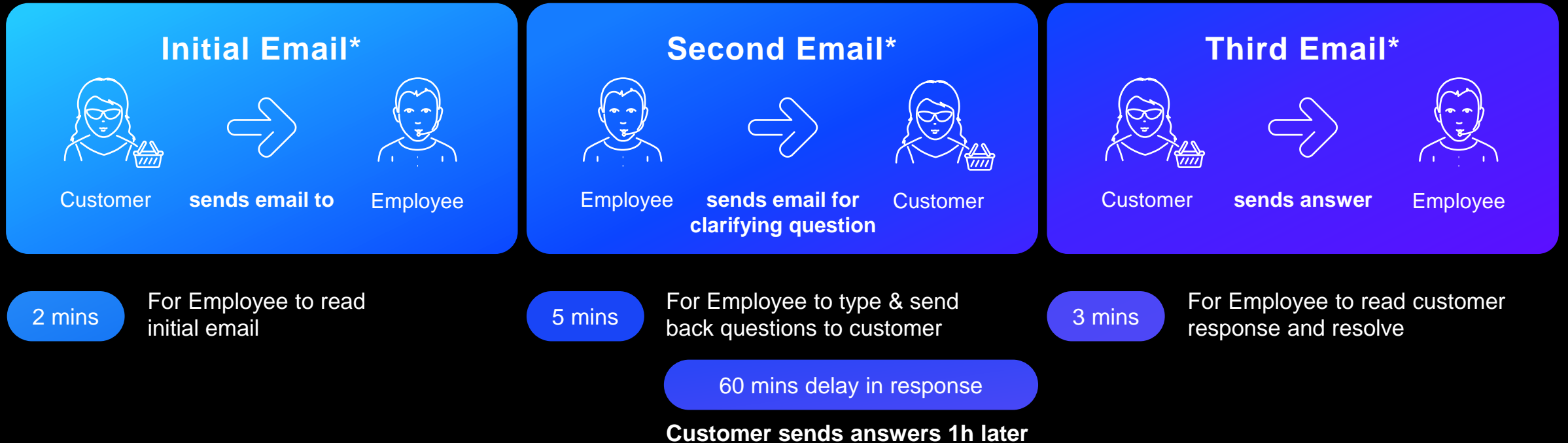
## Synchronous

- The conversation, dialog, or messaging between the requestor and the employee is continual and contiguous.
- Although there may be pauses or breaks in the flow of the conversation, the requestor and the employee are fully engaged and not easily distracted by other work objects.

## Asynchronous

- The conversation, dialog, or messaging between the requestor and the employee is intermittent, sporadic, and discontinuous.
- There are frequent pauses or breaks in the flow of the conversation. The requestor and/or the employee are not fully engaged and are easily distracted by other work objects.

# Challenges with Long Asynchronous Interactions



Business problem:  
**was this...**

- A** One contact that lasted 10 minutes?
- B** One contact that lasted 70 minutes?
- C** Three separate contacts?

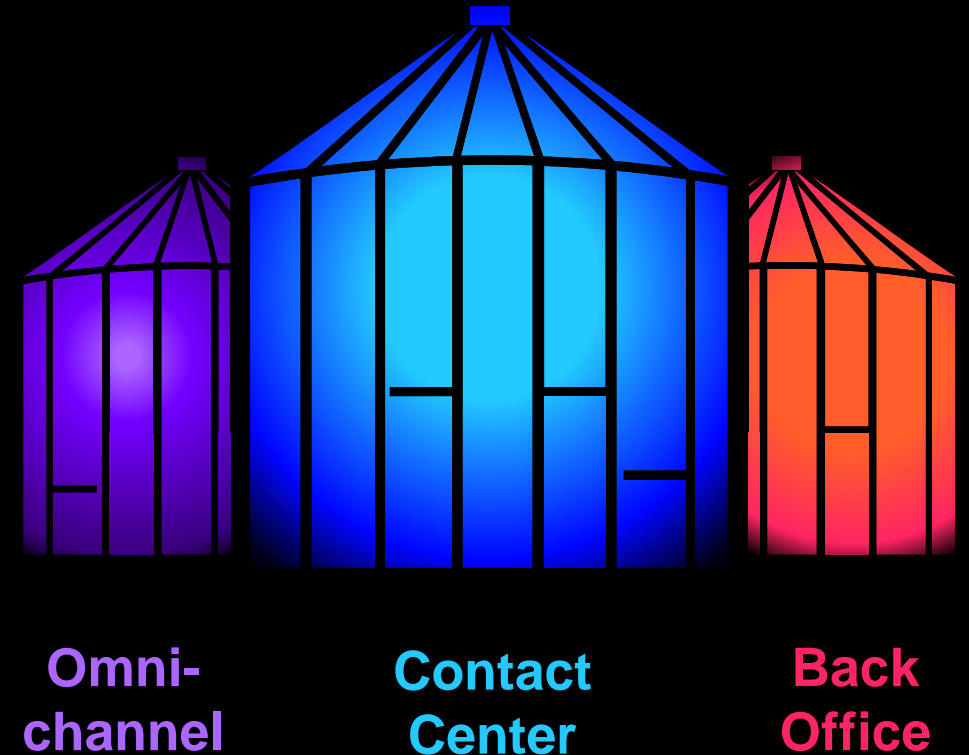
**which interval should the information be reported?**

- 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.

# Current WFM Paradigms Resist Blending Work

- Forecasts are based on when a work item\* is completed (not based on when the work was performed)
- Work items are assumed to be synchronous
- AHT is shorter than the planning interval
- A work item is processed by a single employee
- Employee works no more than 1 work item concurrently
- A work item resides in a single channel



\* Call, contact, chat, social post, message thread, case, ticket, etc.

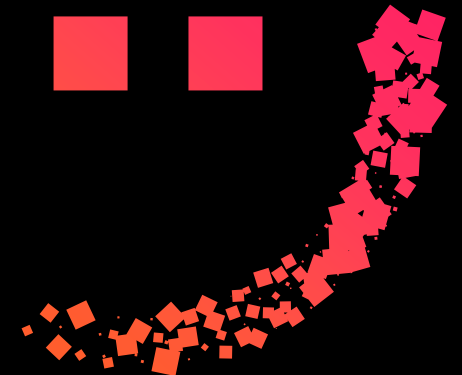
# Don't Sacrifice Accuracy with Simplicity

If you get your data wrong –  
everything else falls apart

AHT is the absolute basic  
building block



# Challenges With Long Interactions




## “When Contact Ended” (WCE)


- 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

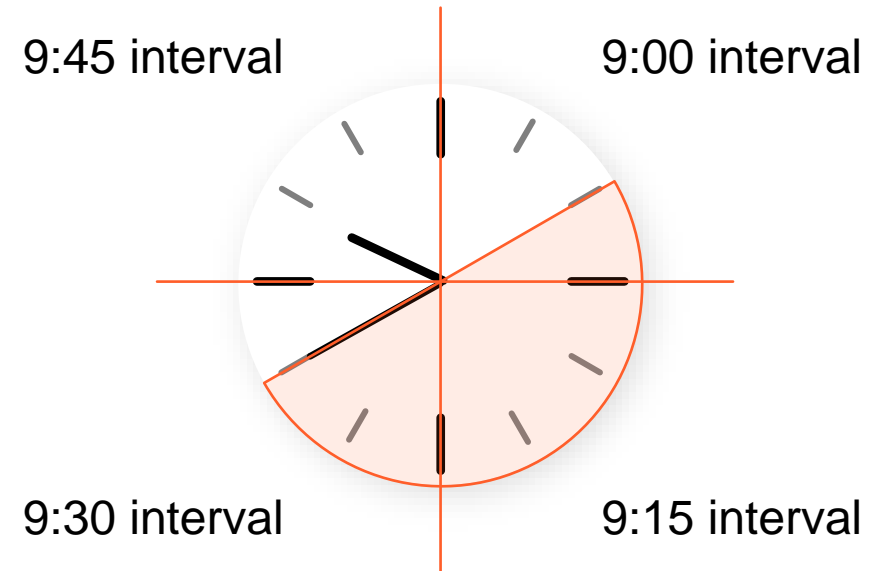
### Contact Arrives at 9:10 & Completes at 9:40

Interval	Received	Handled	Handle Time	Staff Req
9:00	1	0	0	0
9:15	0	0	0	0
9:30	0	1	30	2 people*

\*Workload = (1 contact x 30mins) / 15mins in interval = 2 people

- Use when... 
- most contacts arrive and complete in the same interval
  - 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



# Challenges With Long Interactions

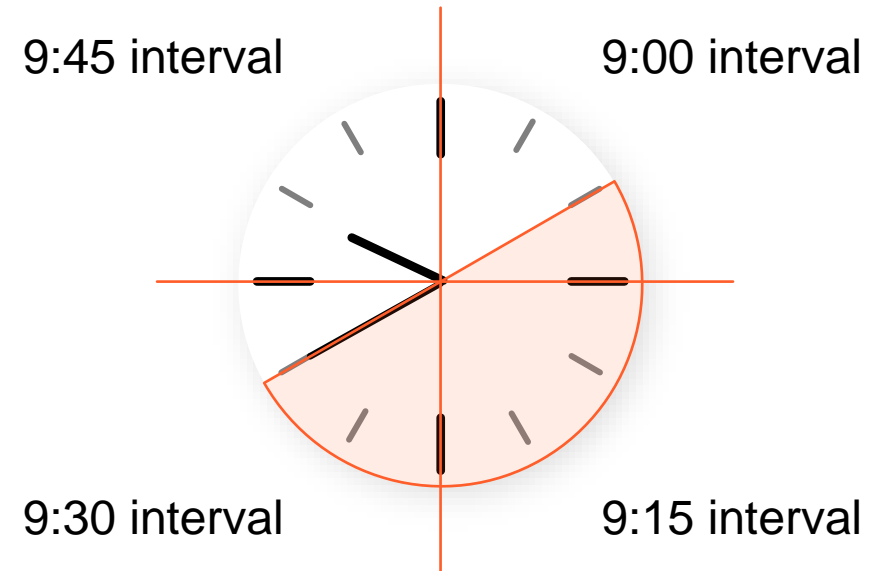


## New “Answered & Active True to Interval” (TTI)

- 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

### Contact Arrives at 9:10 & Completes at 9:40

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



- Use when...
- most contacts arrive and complete in the same interval
  - intervals are 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

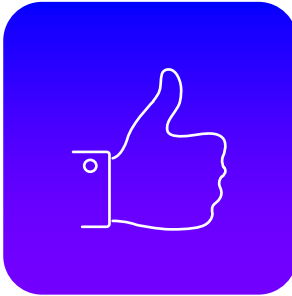
# Result of Doing Digital Right



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%**



This is up from **38%** in 2022!



**85%** of the attrition is voluntary

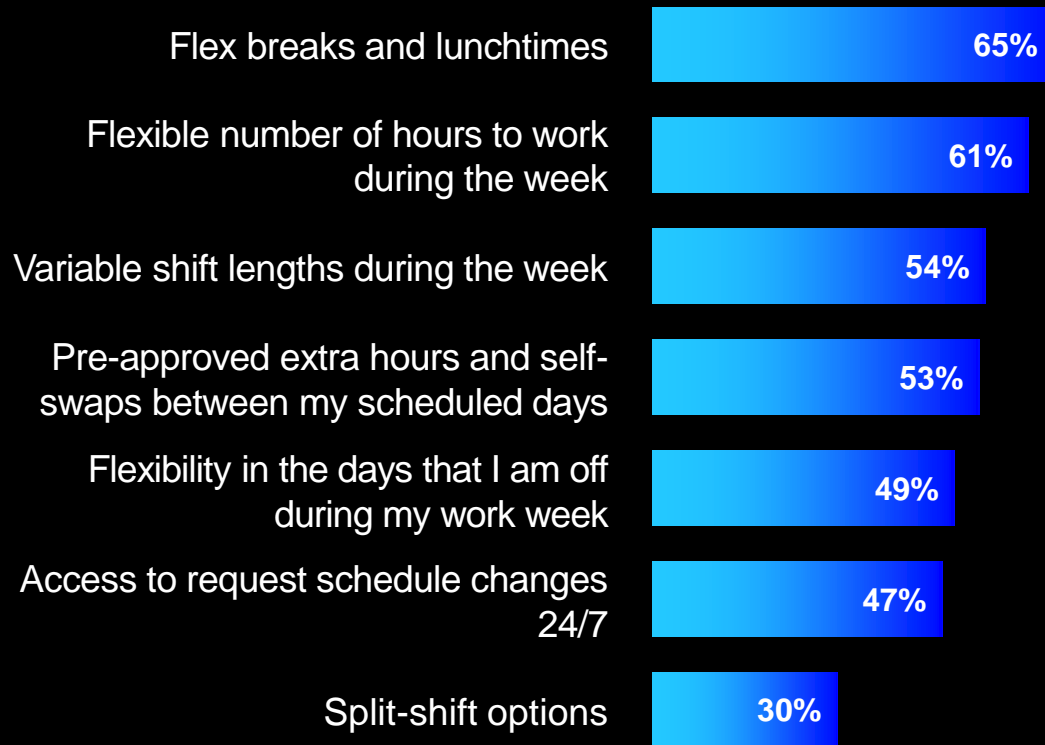


Back Office average attrition was **47%** in 2023

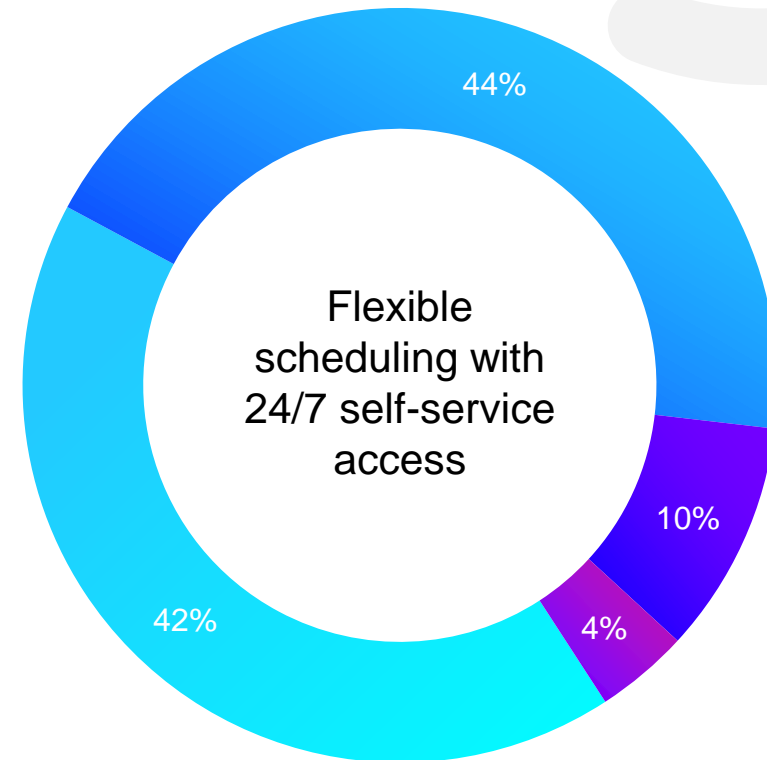


What Was Your Company's Average Attrition Rate in 2023?

# Flexible Scheduling Is Critical for Agents

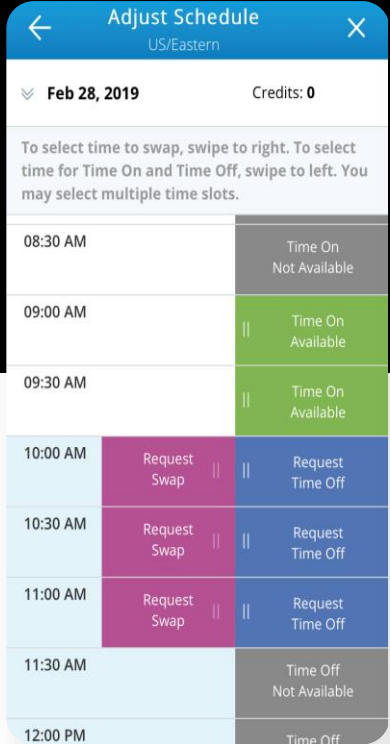


**The most important aspects of flexible scheduling**

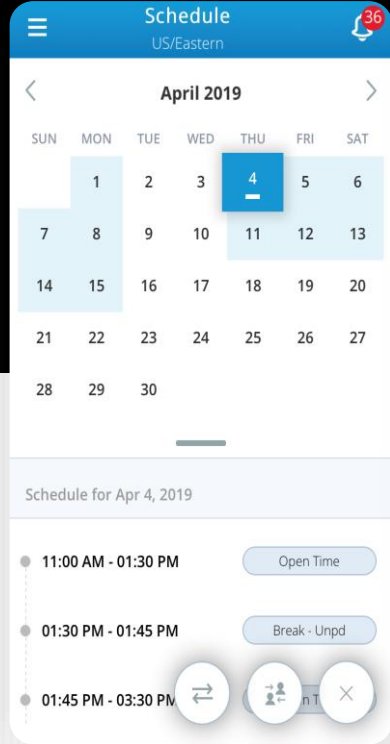


**Factors that affect the decision to keep a position**

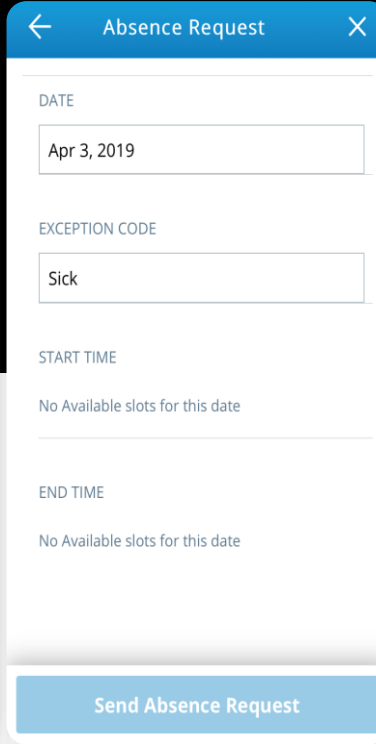
# Make Employees WFM Partners



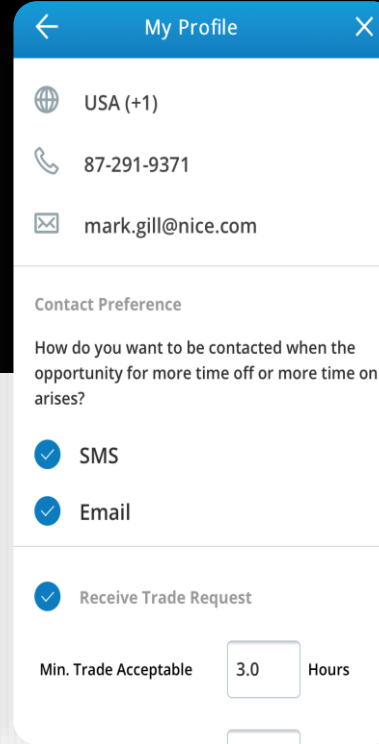
Employees Visibility into Staffing needs



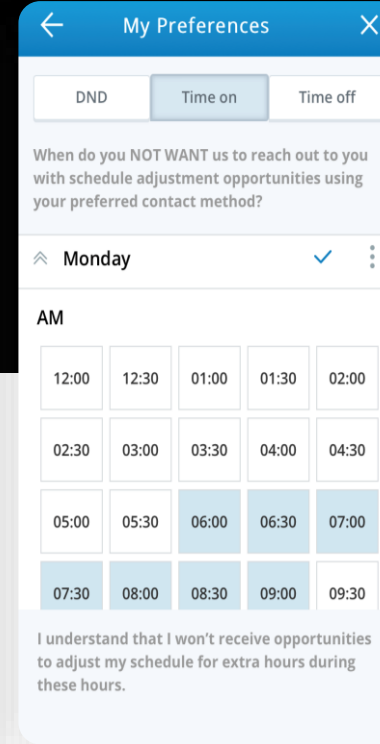
Secure Mobile Access to Schedule View\*



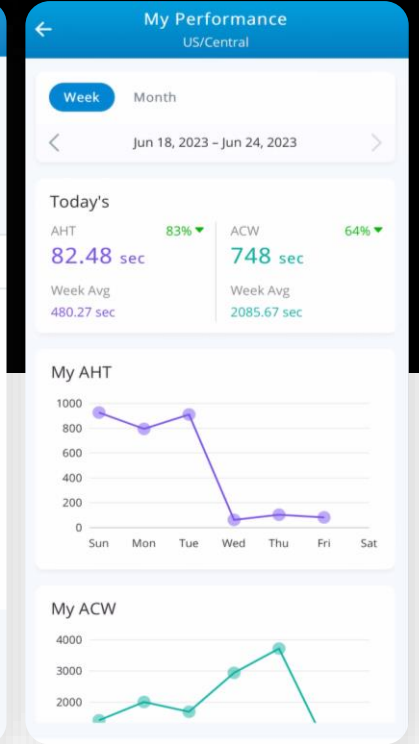
Request Absence easily and update WFM Automatically



Employees Controlled Contact Preferences



Employees Controlled Time On / Time Off / DND Preferences



Performance Mobile View

# Key Takeaways



## The Nature of Work Has Changed!

- Digital and asynchronous work has disrupted traditional WFM practices
- Contact Centers are blending resources across various channels, including the back office
- WFM practices must adapt to meet the needs of today and tomorrow's workforce

**Employee empowerment with self-scheduling can lower your unplanned attrition and shrinkage**

# Thank You

# NICE

Make  
experiences

*flow*

**Andrea Matsuda**

Senior Product  
Marketing Manager

**NICE, Ltd.**

 [Andrea.Matsuda@nice.com](mailto:Andrea.Matsuda@nice.com)

 [LinkedIn](#)

# CrmXchange

## Preparing for the Future of WFM

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Presenter: Mike Wroblewski, Sr. Director Presales Consulting

Date: February 22, 2024

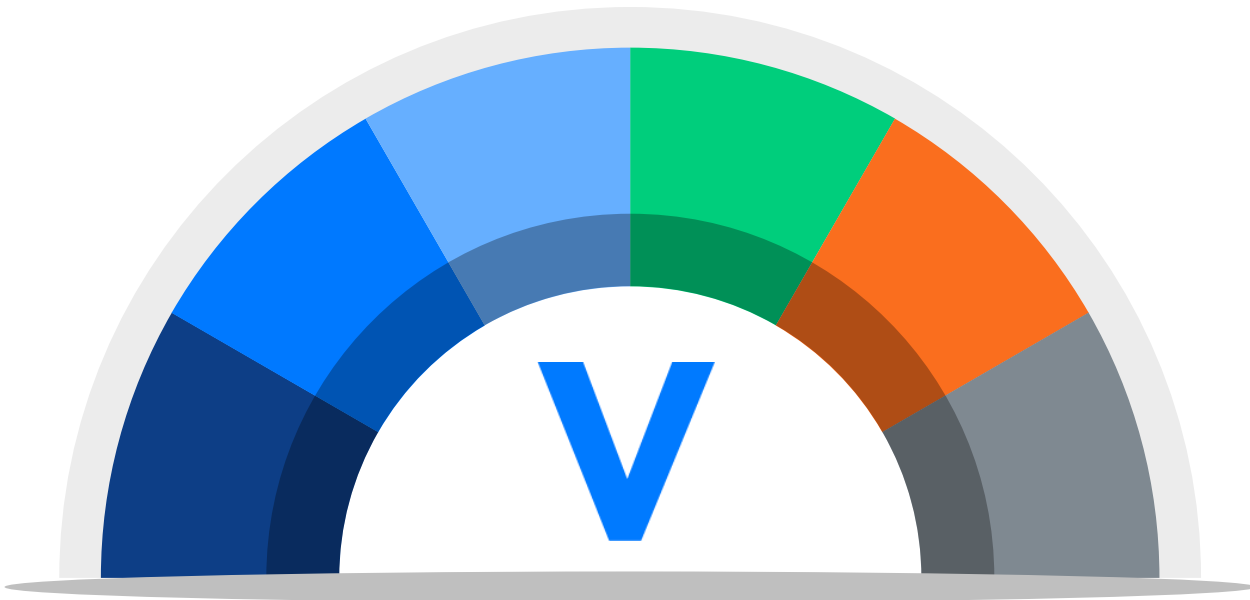
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**VERINT**®



# Innovation. Accelerated.

Powerful. Scalable. Enriched with AI.



Organizations need to accommodate the increasing number of interactions and channels—as well as the increasing customer expectations. All with a finite budget and resources.

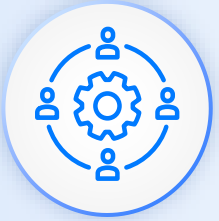
Verint takes great pride in our market-leading Workforce Management solutions and is innovating and evolving to meet the demands of today and tomorrow.

Verint helps brands achieve this strategic objective through powerful and scalable innovations that are enriched with AI.

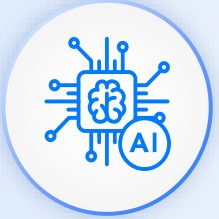


# WFM Roadmap

## Market-Leading Vision developed from Trends and Customer Feedback



Workforce Flexibility to increase EX and engagement



Latest AI models to automate WFM effort and improve forecast accuracy



New Workforce across all channels and people + bots



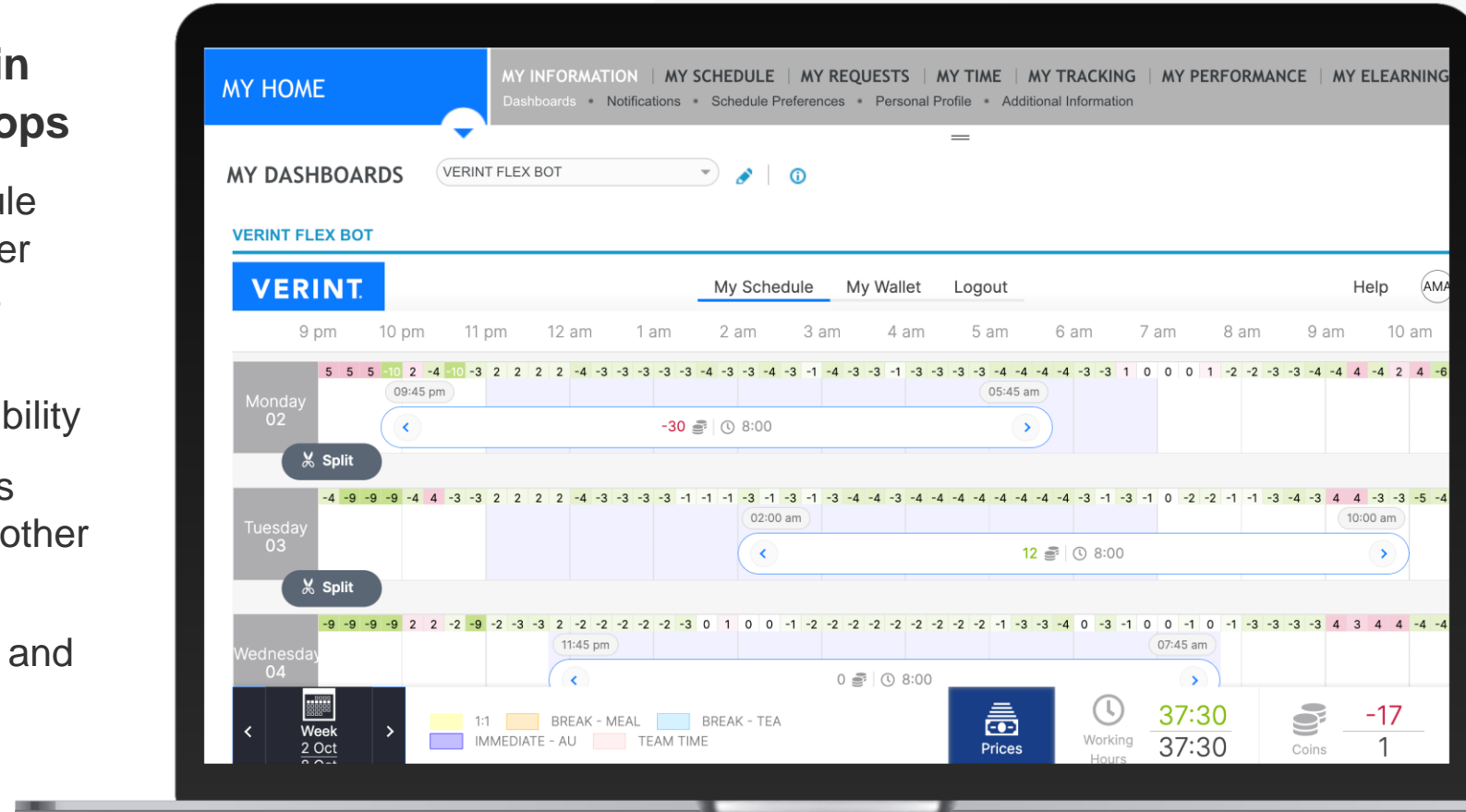
One Workforce across CC, BO and Branch



# Increase Employee Engagement

## Game-changing levels of employee schedule flexibility, embedded within Verint Desktop, or third-party desktops

- Encourages employees to make schedule changes that are both helpful to customer experience metrics and their own needs
- Leverages "FlexCoins" as a currency to exchange for even greater levels of flexibility
- Provides an employee experience that is embeddable within Verint Desktop, and other desktop platforms
- Reduces attrition, unplanned absences, and administrative effort for WFM Analysts



# Increase Employee Engagement

## Request Anything

- Delivers elevated schedule flexibility and automation capabilities to allow employees to request any schedule change and allow automation for schedule change approvals.
- Provide a modern, modular service and user interface that can be embedded in any WFM product.
- Reduces administrative effort for WFM Analysts
- Creates workflows and built in audit trails for all requests.

The screenshot displays the Verint Request Management interface. At the top, the 'Request List' section shows a summary: Total 115, Updated today 3, Submitted today 6, Unread warnings 4, and Pending 12. Below this is a table of requests with the following columns: Activity, Action, Status, Submitted, Requested start time, Requested end time, Comments, Warnings, and Actions. The table contains 12 rows of data, including requests for Time off, Meeting, Break, and Meeting, with various statuses like Pending, Approved, and Withdrawn. A search bar and pagination controls are visible at the bottom of the interface.

Activity	Action	Status	Submitted	Requested start time	Requested end time	Comments	Warnings	Actions
Time off	Add	Pending	3/15/2023	3/20/2023   07:15am	3/21/2023   08:15pm	This is my sister wedding	0	
Meeting	Move	Approved	3/14/2023	3/15/2023   09:15am	3/15/2023   09:30am	I need to make a call	2	
Break	Shorten	Approved	3/14/2023	3/15/2023   09:15am	3/15/2023   09:30am	I need to make a call	0	
Break	Move	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	5	
Meeting	Delete	Approved	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	0	
Break	Add	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	1	
Break	Edit	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	2	
Break	Edit	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	1	
Break	Edit	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	0	
Break	Edit	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	0	
Break	Edit	Withdrawn	3/14/2023	3/14/2023   09:15am	3/14/2023   09:30am	I need to make a phone call	0	

# Mobile App

## Revitalize Mobile-first Agent Experiences, powered by the breadth of Verint Cloud Solutions

- One application – My Verint – starting with agents, expanding to all personas, that accompanies the employee throughout their day to set them up for success in a modern, engaging way
- Task oriented application that anticipates the needed actions and information based on the employee last task, current task and upcoming task
- Leverage the powerful capabilities and data that exist in the Verint Cloud Platform to create a modular solution that is uniquely “Verint,” with a modern, engaging UX



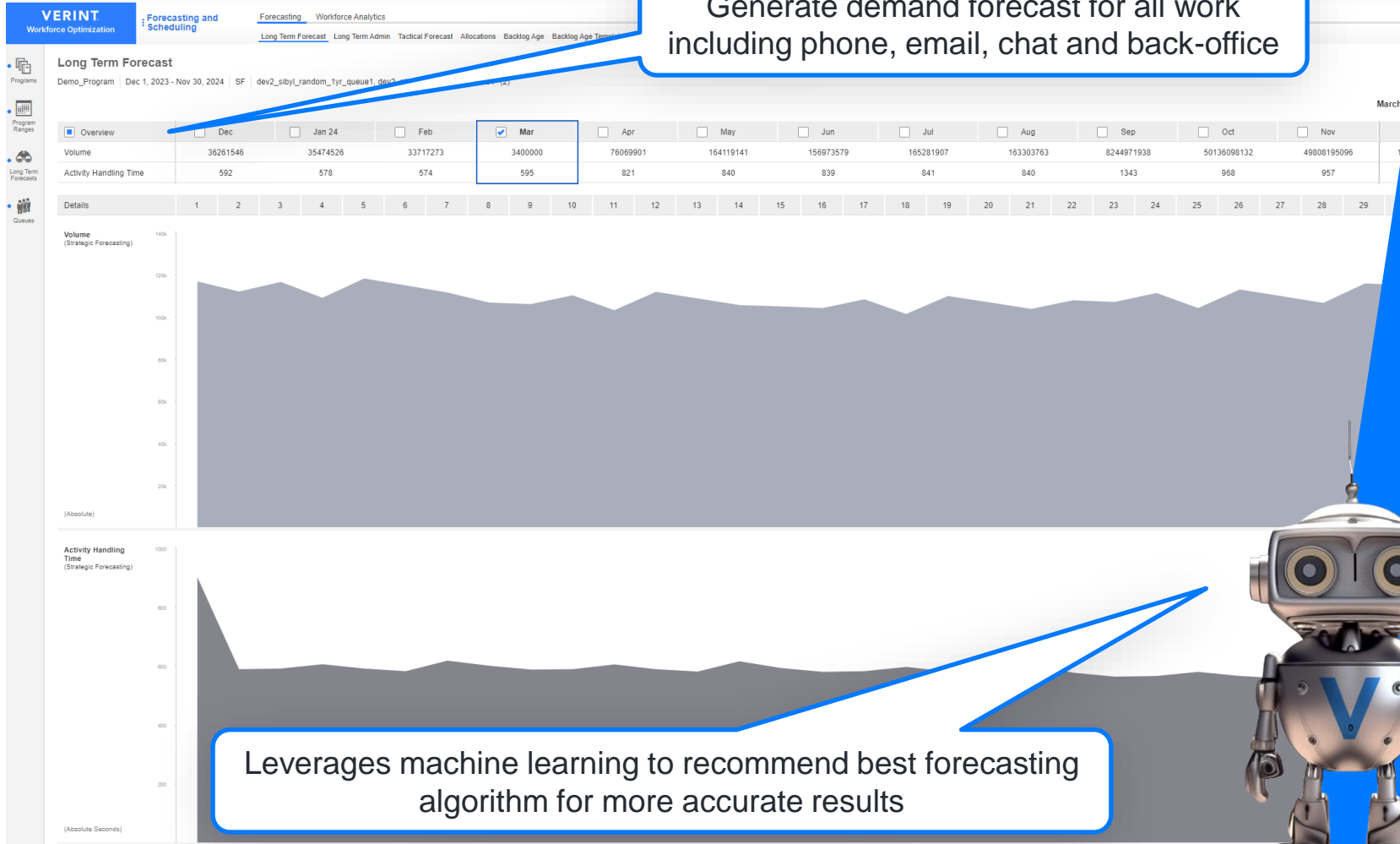
# Increase Employee Engagement

*“Our employees really love the automation that Verint provides. (...) It's really improved our employee engagement scores in areas like flexibility to take time off because we can now provide quicker decisions and make sure it's fair and equitable.”*

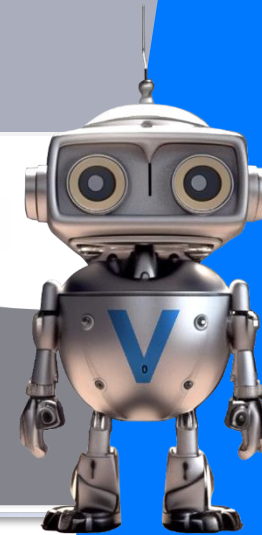
<https://www.verint.com/case-studies/navy-federal-credit-union-unifies-departments-with-centralized-workforce-management/>

# AI Driven Demand Forecasting

Generate demand forecast for all work including phone, email, chat and back-office



- The Bot assists WFM Analysts in accurately predicting volume and handle time via multiple demand forecasting algorithms
- Forecast for all work including phone, email, chat and back-office interactions
- Machine learning leverages customer data to recommend best forecasting algorithm for more accurate results
- Does not require WFM teams to be AI experts



# Get the Answers You Need

## Data Insights Bot

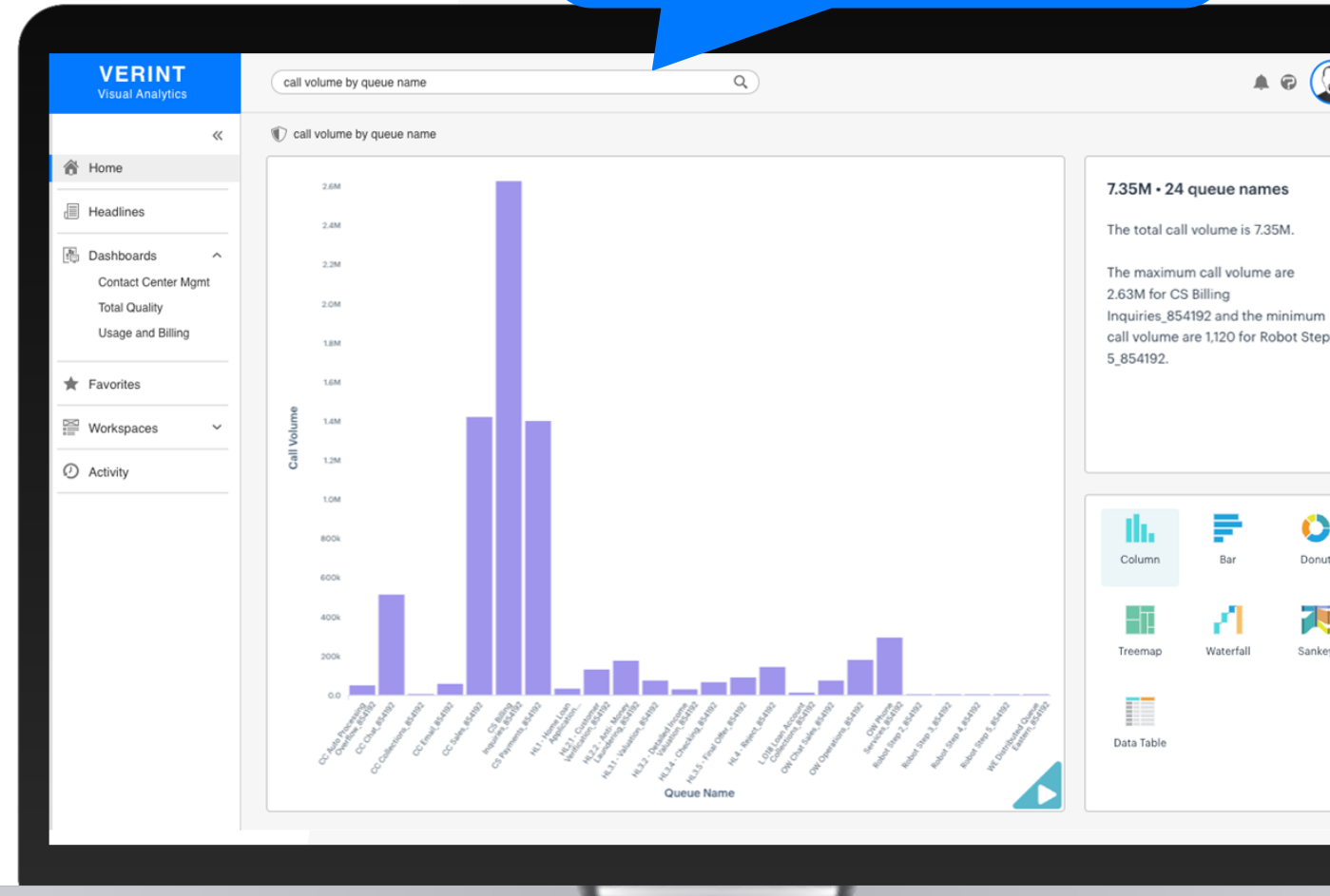
Provides users self-service access to their organization's engagement data—with zero training required—using a highly intuitive, search-driven interface powered by natural language search and AI.

### Visualize the Data:

- Dashboards designed by role and use-case
- Drill down into charts to get deeper insights
- Use natural language search to explore the data
- Collaborate with colleagues
- Build your own dashboards

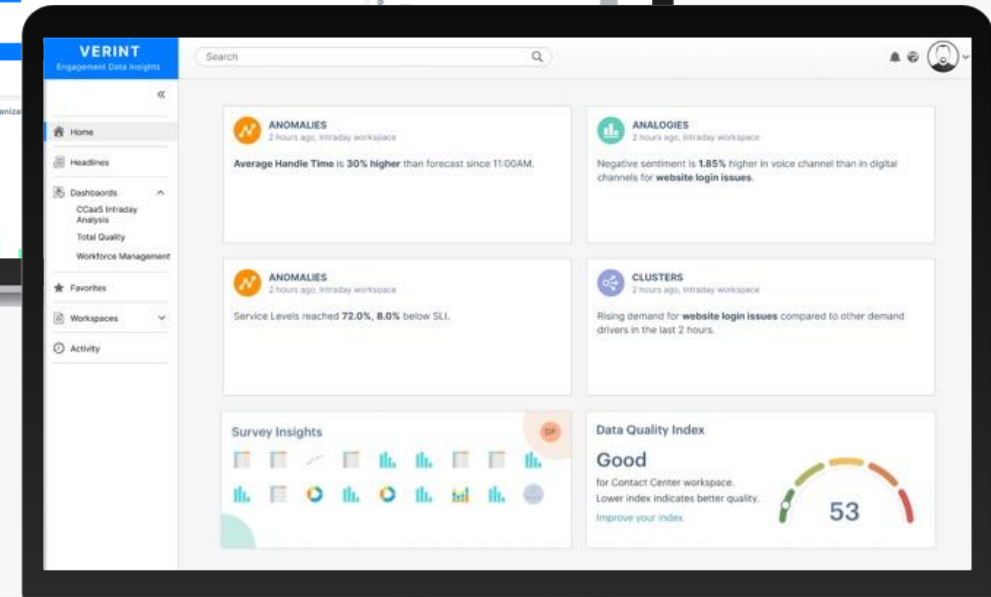
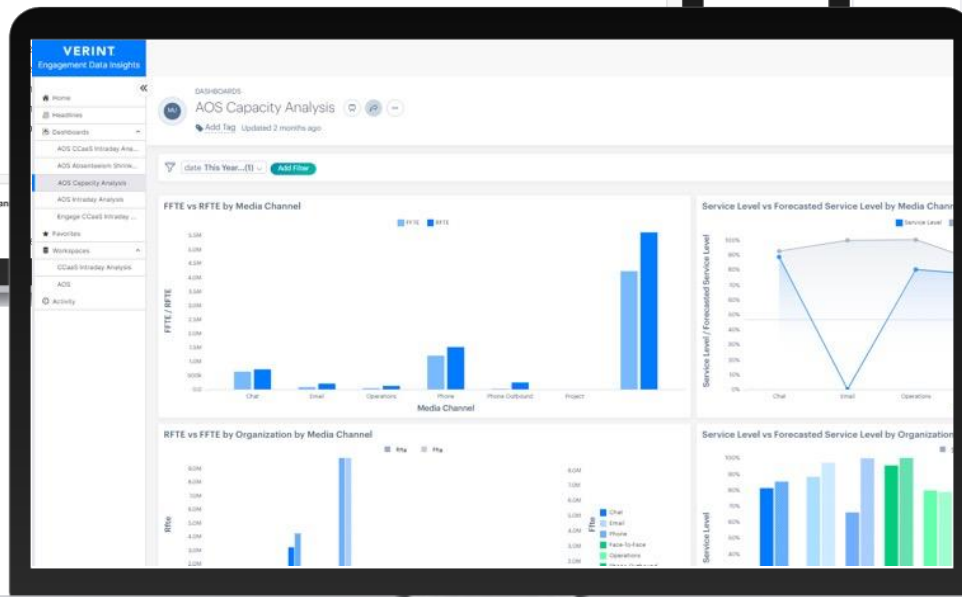
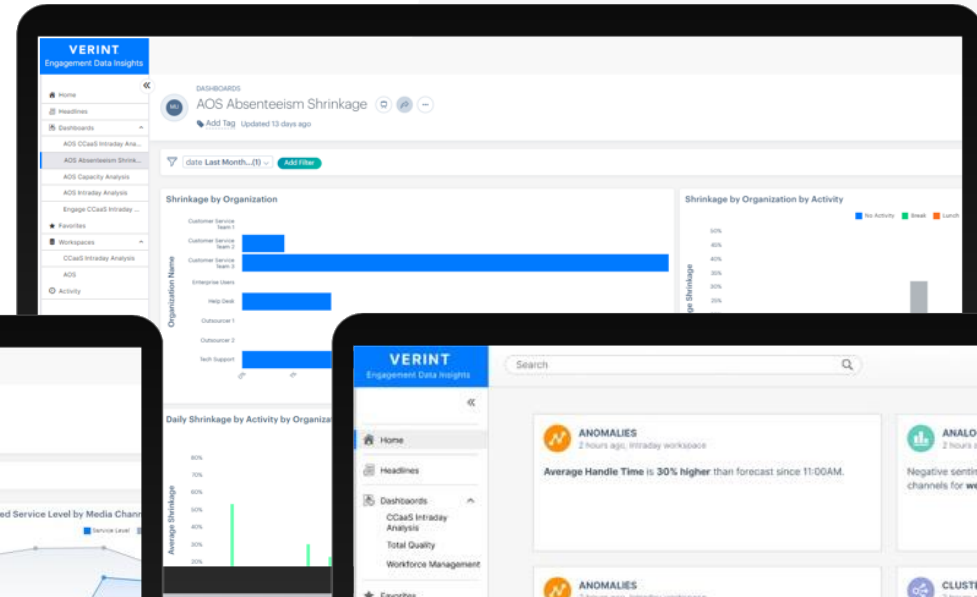
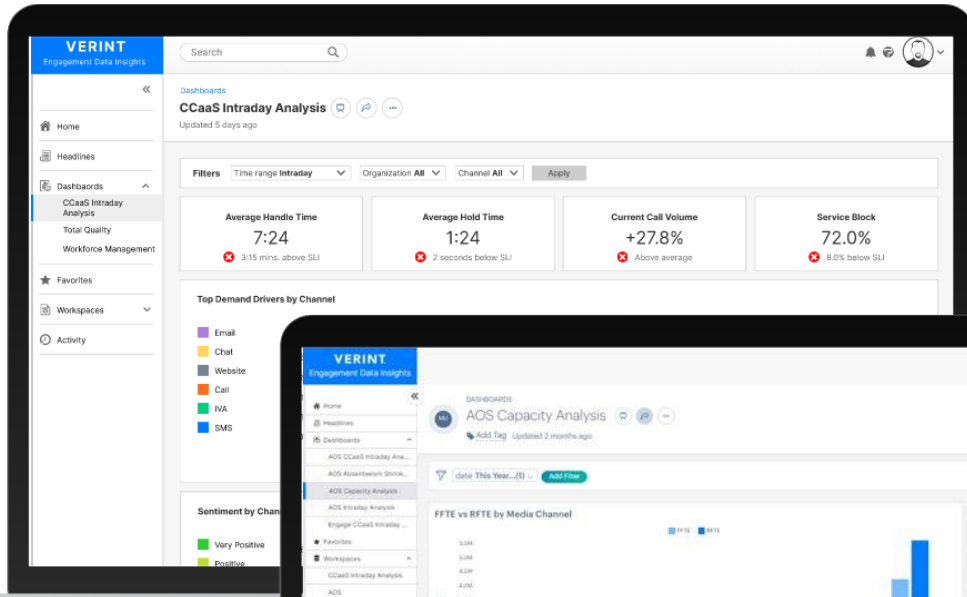
"What is the AHT vs forecasted handle time this month?"

"Show me the ACV vs FCV in 2023 grouped by media channel?"



# Many OOTB Dashboards Available

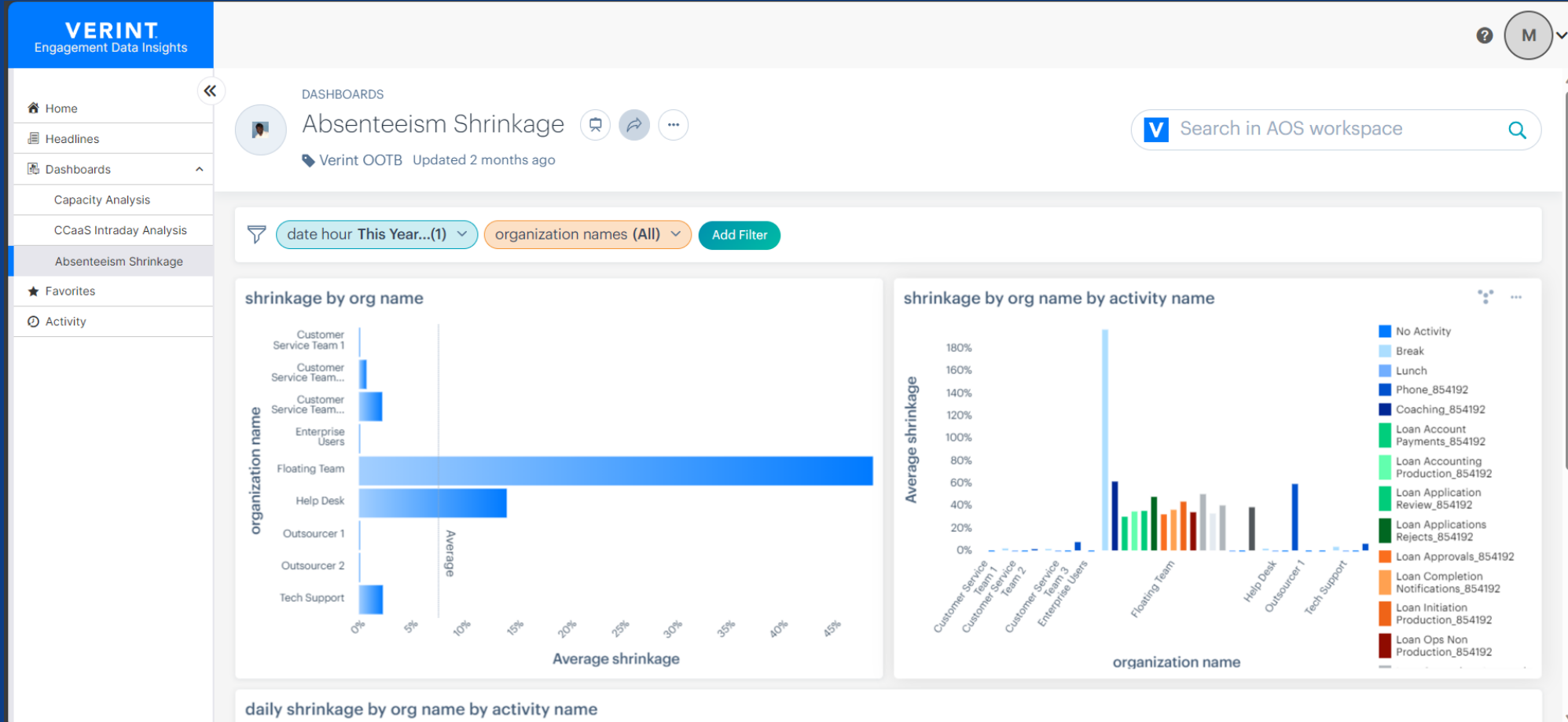
## Data Insights Bot



Provides business users easy, self-service access to all their engagement data using pre-built dashboards, AI insights and natural language search.



# Data Insight Bot

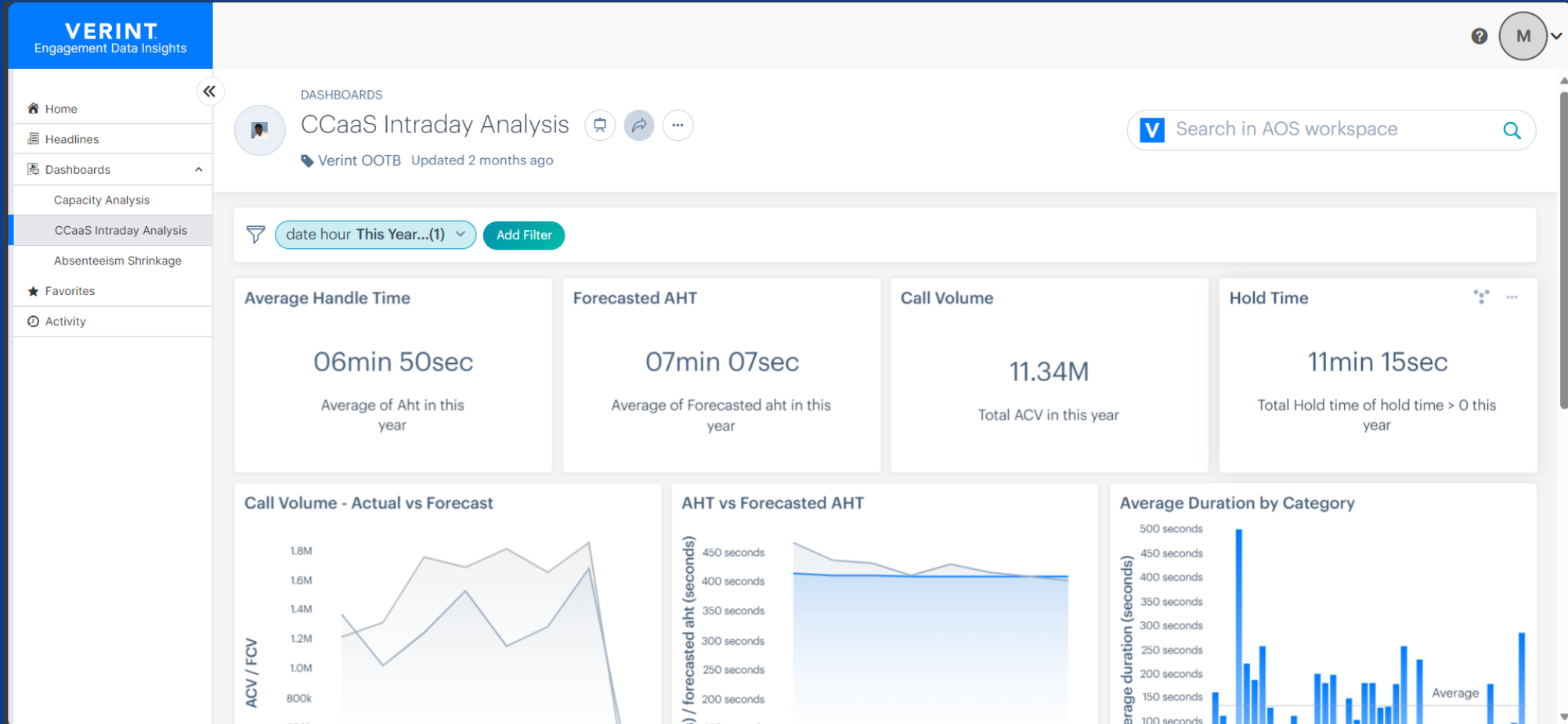


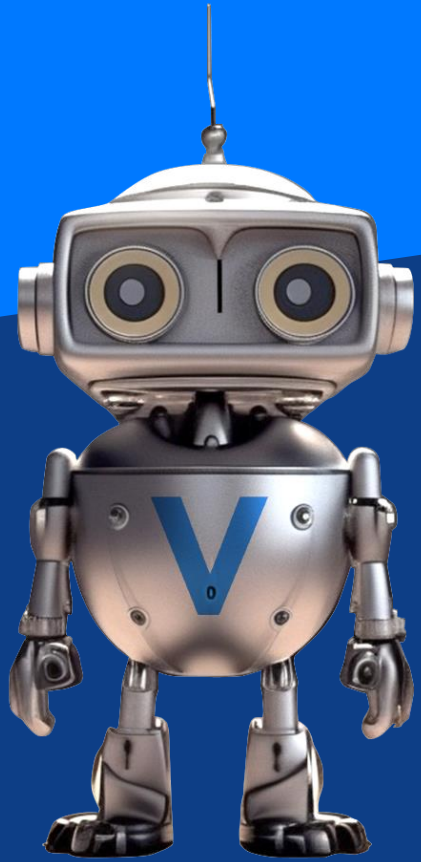


Provides business users easy, self-service access to all their engagement data using pre-built dashboards, AI insights and natural language search.



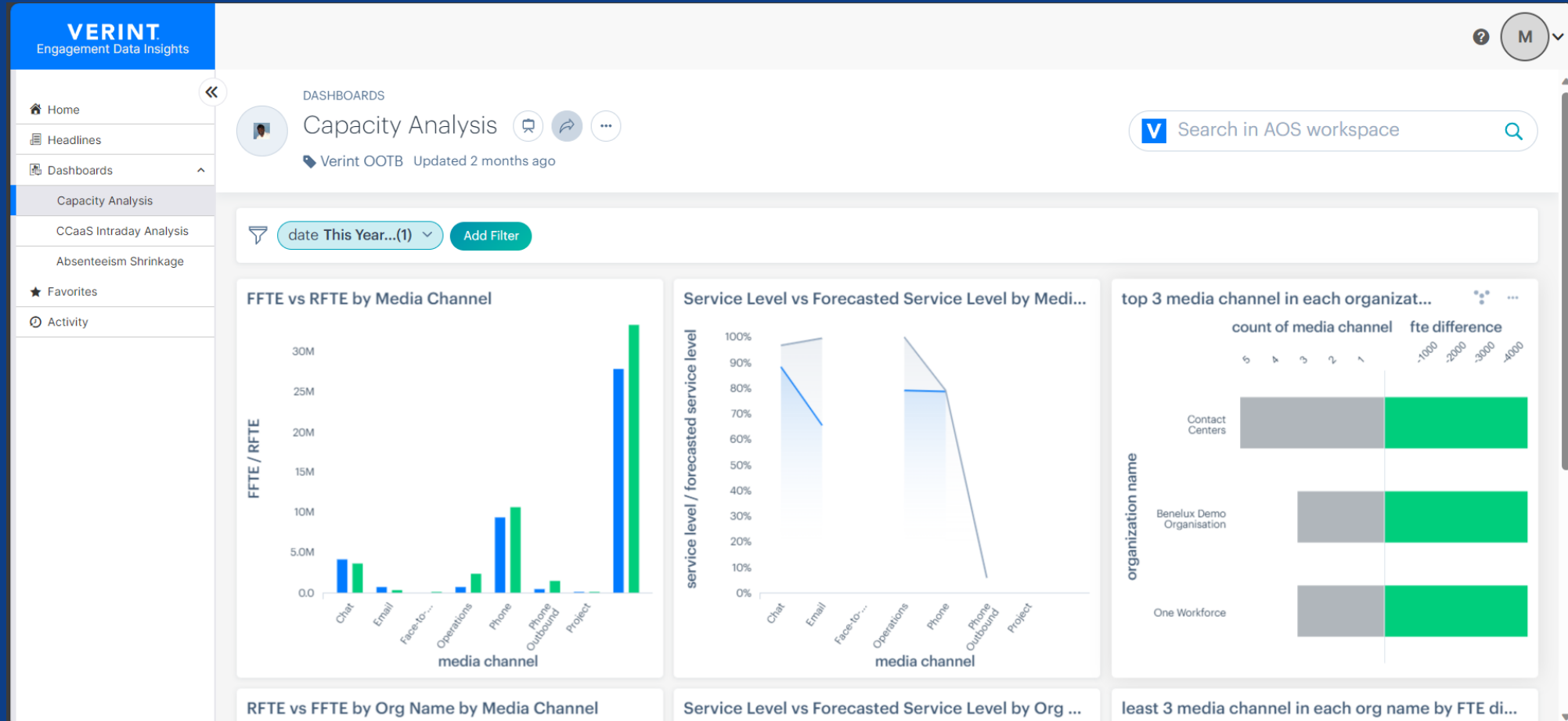
# Data Insight Bot





# Data Insight Bot

Provides business users easy, self-service access to all their engagement data using pre-built dashboards, AI insights and natural language search.



# Connect Channels and Silos

*“Verint helped us innovate and break down silos across the company to provide a more omnichannel solution to what we do. When one area of the company is understaffed, but another area may be overstaffed, we’re now better able to see that across the company and balance workloads more effectively.”*

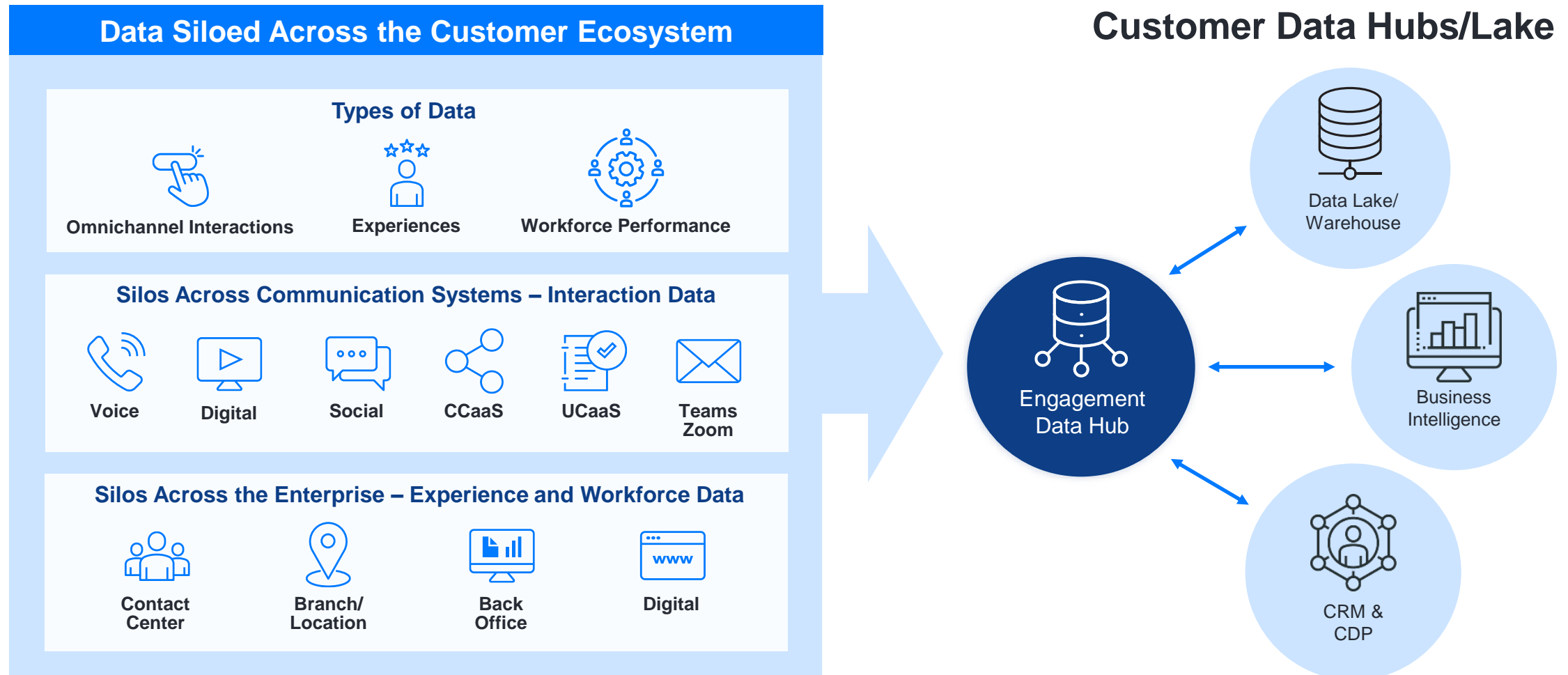
<https://www.verint.com/case-studies/navy-federal-credit-union-unifies-departments-with-centralized-workforce-management/>

**Thank You**

**VERINT<sup>®</sup>**

# Verint Data Hub - Making Engagement Data Accessible

## Eliminate Data Silos and Create a Unified Engagement Data Hub



# PREPARING FOR THE FUTURE OF WFM

**Andrea  
Matsuda,  
Senior Product  
Marketing  
Manager, NICE**

**Michael  
Wroblewski,  
Sr. Director,  
Solution  
Consulting,  
Verint**

