



Balancing Bots, Agents, and Customer Needs: WFM Practices for Modern Contact Centers

May 13, 2025

Changing Times, Technology, and Employee Expectations

1990's Contact Center



2025 Contact Center



Top Agent Workplace Priorities



Scheduling flexibility



Scheduling fairness



Scheduling self-service



Timely and fair performance feedback & recognition



Effective training

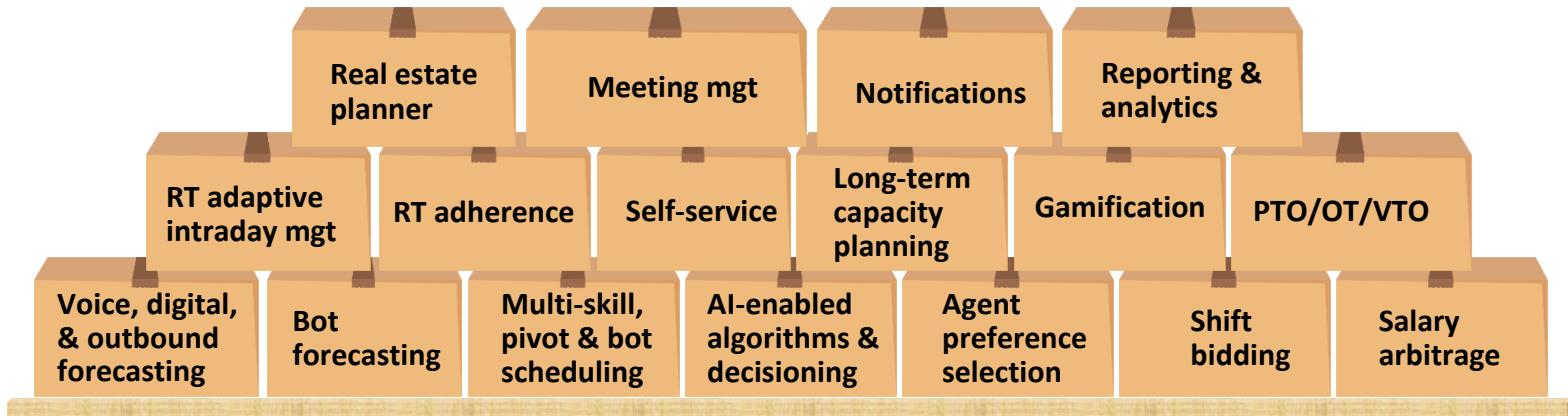


Fair compensation



Career opportunities

WFM Delivers



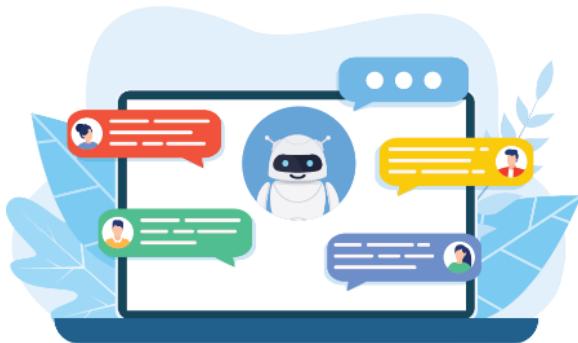
WFM Best Practices to Optimize Live and Automated Resources



Human Employees

- Take a balanced view of employee performance metrics
- Use appropriate metrics to measure productivity, utilization, occupancy, adherence, and shrinkage and share the data with managers, supervisors, and employees
- Appropriately staff and thoroughly train WFM resources to realize the greatest benefits from solution, and have a back-up
- Identify and address the causes of agent attrition

WFM Best Practices to Optimize Live and Automated Resources – Cont'd



Human/Bot

- Elegantly account for escalations from bots to human agents and vice versa
- Accurately account for the use of agent augmentation tools and applications
- Enable employee self-service, including allowing agent scheduling and PTO/VTO/OT autonomy and flexibility
- Automate the PTO/VTO/OT/time-off management process
- Incorporates AI to optimize bot performance

WFM Best Practices to Optimize Live and Automated Resources – Cont'd

System Selection

- Select a flexible WFM solution that supports traditional and new (agent-driven) scheduling paradigms and approaches
- Acquire a WFM solution with a high forecasting accuracy rate for both synchronous and asynchronous interactions, as well as those that pivot between channels
- Ensure the WFM platform includes integrations with all business systems that impact forecasting and scheduling (e.g., CCaaS, self-service, HR, payroll, timekeeping)
- Ability to continuously optimize the forecast and schedule throughout the day to improve the CX and keep costs down
- Review the preferred vendor's R&D roadmap to ensure they align with your company's needs



WFM is Critical for Balancing Customer, Agent, and Bot Requirements



Challenges with Long Asynchronous Interactions



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...

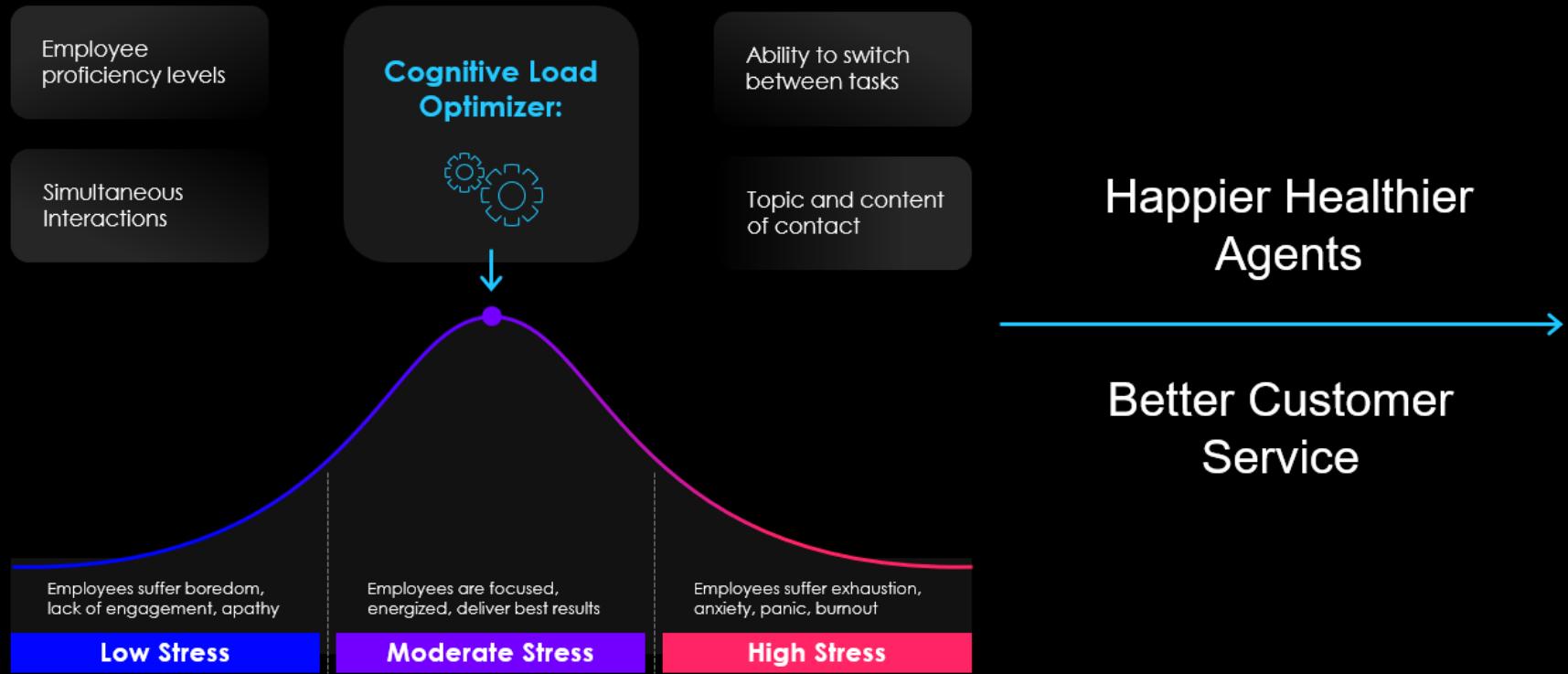
- contacts arrive and are completed in *any* interval (synchronous or asynchronous)
- Intervals are *shorter or longer* than the handle times

Solves staffing problems when...

- handle times are long or intermittent and contacts span intervals
- intervals are shorter than the handle times

Cognitive Load Schedule Optimizer

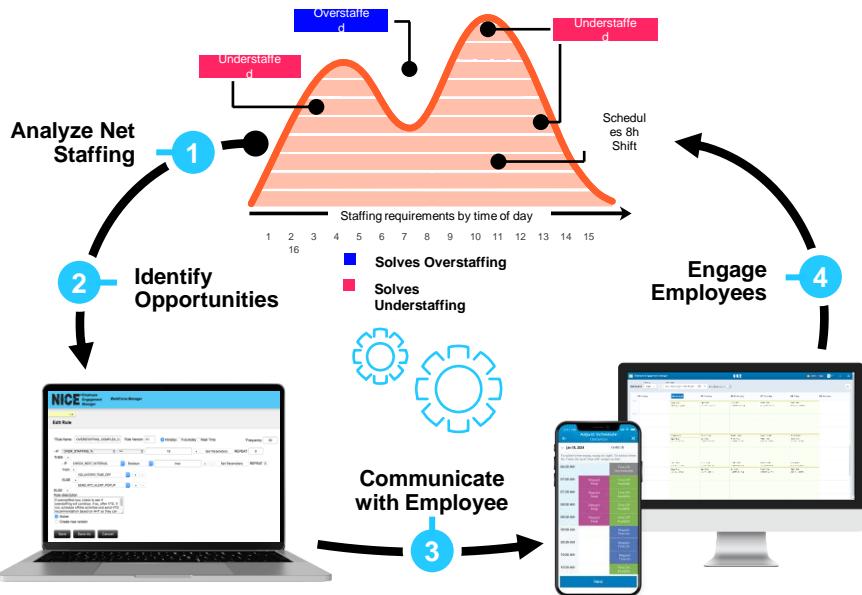
Balancing Workloads



Employee Engagement & Intraday Management



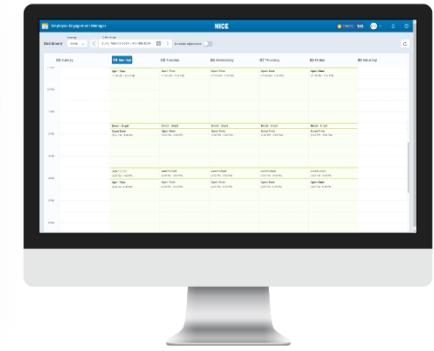
Staffing Optimization Rules



Transform Employees into **Active** Workforce Management Partners

Employee Self Service

REACHABILITY



VISIBILITY & ACCESS

24/7 **Anytime, Anywhere** Access

AI-Based Business Rules

Insights and Real Time Alerting



AI Recommendations
to Create and Manage
Business Rules



Provides Complete Visibility
to Your Business Data



Delivers Real-Time Alerts



Adaptive Events

Employee Engagement Manager

View by: Dashboard Week Date range Mon | Oct-16-2023 - Oct-22-2023

16 Monday 17 Tuesday 18 Wednesday 19 Thursday

12 AM Break/Pause
Open Time (12:15 AM - 1:45 AM)

1 AM

2 AM Lunch/Dinner (1:45 AM - 2:15 AM)
Open Time (2:15 AM - 5:45 AM)

3 AM Break/Pause
Open Time (2:45 AM - 6:15 AM)

NICE

Notifications

Today

Info 2 mins Dear Yerbol, You have exceeded time-in-state. Actual State: Break/Pause, Time in state: 383 seconds. Thank you, NICE EEM

Info 3 mins Dear Yerbol, You have Break/Pause starting soon. Start this activity at the next reasonable opportunity, and EEM will adjust your schedule automatically. Thank you, NICE EEM

Info 3 mins Dear Yerbol, Your shift has been modified: Activity 'Break/Pause' from 05:15 AM - 05:30 AM US/Central has been adjusted to 'Break/Pause' from 05:11 AM - 05:26 AM US/Central. Thank you, NICE EEM

Info 5 mins Dear Yerbol, You have Break/Pause starting soon. Start this activity at the next reasonable opportunity, and EEM will adjust your schedule automatically. Thank you, NICE EEM

Info 50 mins

NICE

About

The Toronto-Dominion Bank and its subsidiaries are collectively known as TD Bank Group (TD). TD is the sixth largest bank in North America by assets and serves more than 27 million customers operating in a number of locations in financial centres around the globe. TD Bank also ranks among the world's leading online financial services firms, with more than 15 million active online and mobile customers.

Solutions

- Workforce Management (IEX)
- Employee Engagement Manager
- NICE Value Realization Services

**Millions
of dollars**
in savings annually

**88M
minutes**
saved for customers

Challenge

Toronto-Dominion (TD) Bank is one of the largest banks in North America. A longtime NICE partner, TD Bank began using Employee Engagement Manager in addition to Workforce Management in 2018. With a changing workforce, TD Bank found a way to meet its preferences for nonstandard scheduling options while addressing scheduling gaps and changing business needs.

Solution

TD Bank worked with VRS to launch a Voluntary Time Off initiative alongside new scheduling self-service options. After initial training, agents jumped right in and embraced their new autonomy. Since launching, the program has increased the number of calls handled by 11% and allowed agents to take 480,000 VTO hours. These successes have helped set the stage to integrate AI into WFM processes, with a key focus on forecasting and scheduling.



Big Increases

11% Increase

in calls handled

480,000

in Voluntary Time Off hours

85-89%

occupancy rates

Exceeded

CSAT target by 4.5%

"To be a best-in-class contact center you need the right tools – like NICE—and you need to understand it inside and out. Don't take shortcuts."

– Dawn Squires, Employee Engagement Manager, TD Bank

NICE | interactions

June 16-18, 2025 | Las Vegas

REGISTRATION
IS OPEN



Q&A

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Thank you

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