

CrmXchange & SRC Eduseries

Data: Where To Begin

A semi-transparent background image of a modern office environment. In the foreground, a man in a suit is looking at a tablet. Behind him, several other people are working at desks with laptops and papers. The office has a light-colored interior with large windows.

How to **Build A RELIABLE Workforce Foundation** by implementing a **Strategic Data Management process** **WITHOUT** needing years of experience and an expensive budget!

Why Data Feels So Hard to Get Right?



Who This is For & What You'll Get Out of It

Beginners



Experienced Professionals



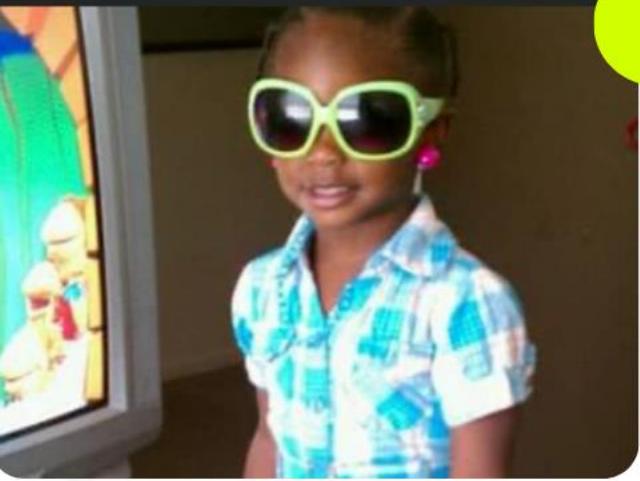
Data Management Process is the Key to Unlocking Operational Efficiency, CX & EX Success

BUSINESS SUCCESS

Customer Experience
Operational Experience

Data Management





My Journey

Juanita Coley

SOLIDROCK CONSULTING, CEO
THEE CONTACT CENTER WHISPERER

Author of “WFM Go Beyond”

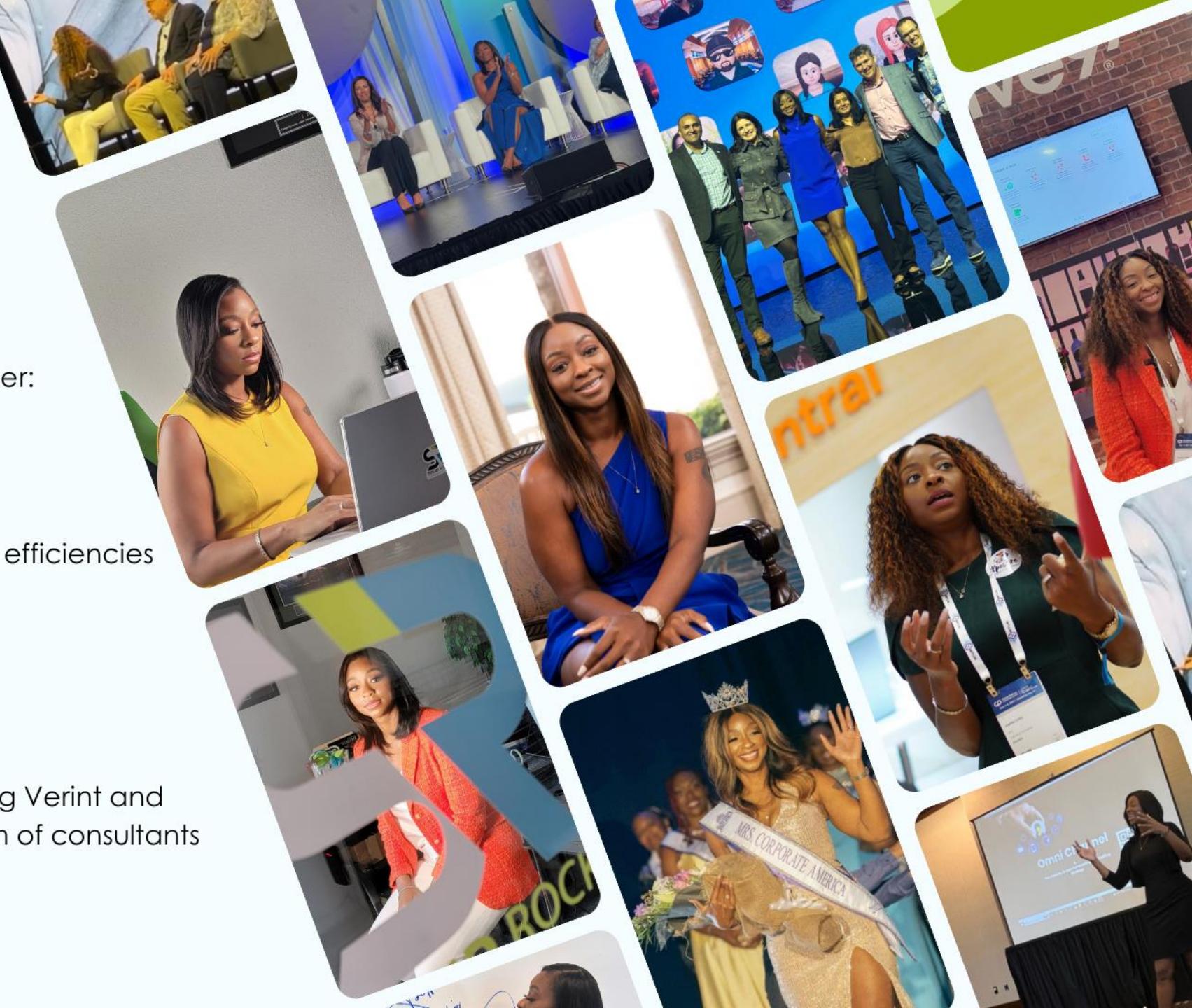
Recognized industry leader & award winner:

- Mrs. Corporate America 2022
- 2022 Most Influential Tech Advisor
- 2022 Top 25 Thought Leader

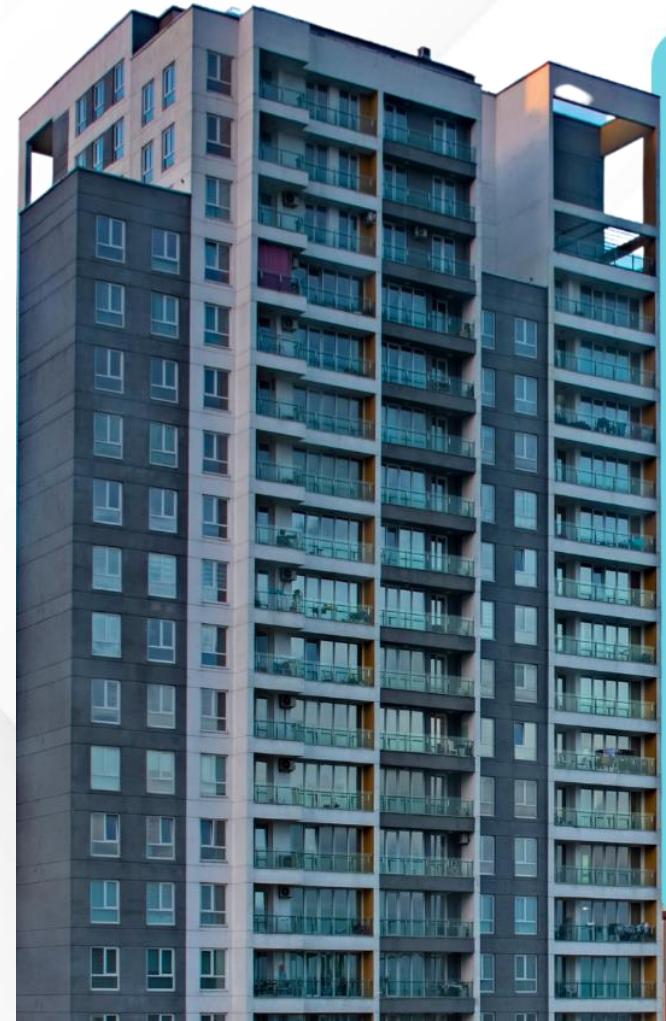
Over 20 years of expertise in WFM, driving efficiencies for brands like:

- United HealthCare
- Optum
- Walgreens
- Liberty Medical

Consulted for top WFM providers, including Verint and Aspect. Global presence—leading a team of consultants across the US, Canada, and EMEA.



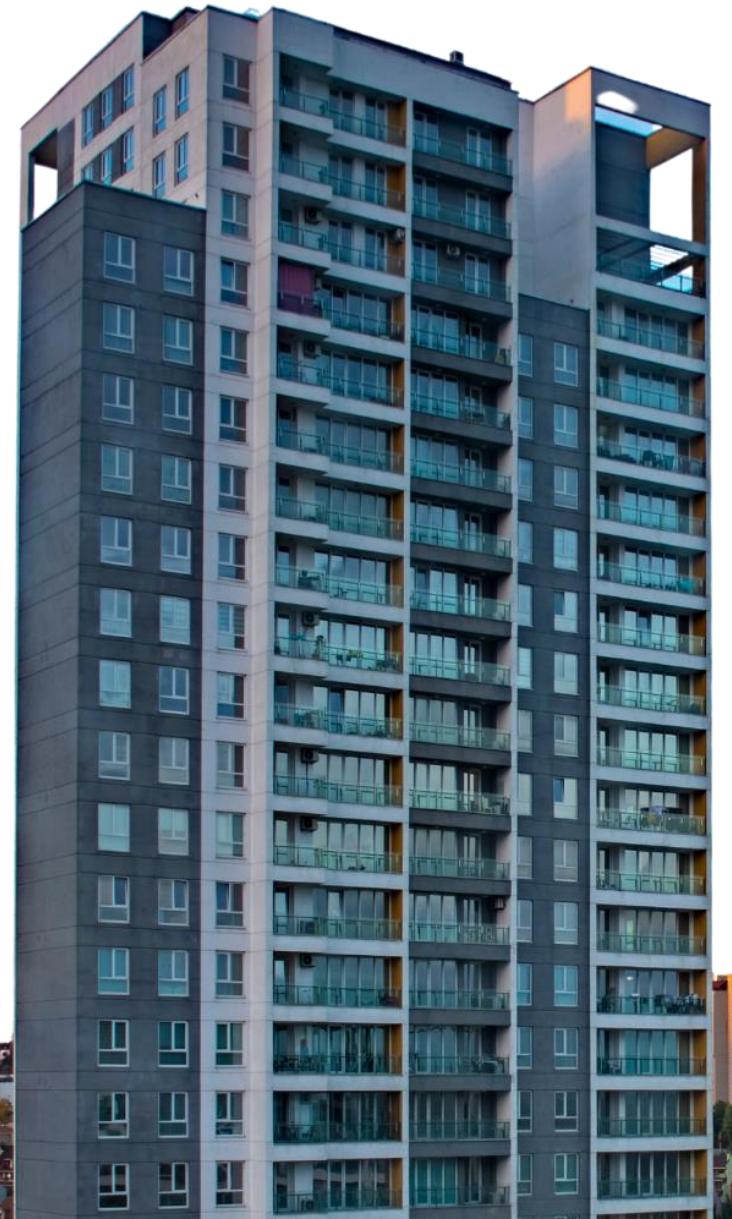
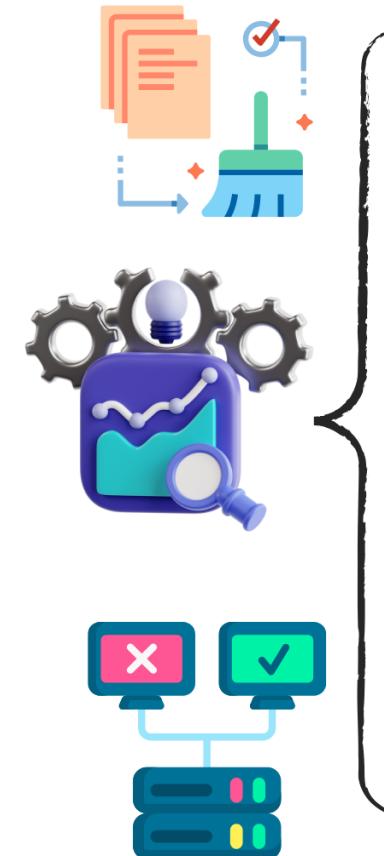
The Big Problem...



What didn't work...



What I Discovered That Gave Me The Epiphany



The Epiphany



Data Management Framework



Impact from this Framework...

20% increase in system adoption



45% reduction in forecasting errors.



Millions saved



The 3 Secrets

Secret #1- Data Management - How to ensure your workforce, customer, and employee strategies are built on accurate, reliable data—so you stop making costly decisions based on bad information.

Secret #2 - Data Integration - How to fix data issues at the source—before investing in expensive tools that will only make bad data problems worse.

Secret #3 - Data Insights - How to simplify your data strategy by focusing on the right metrics—so you can make faster, smarter business decisions without drowning in unnecessary data.

Secret #1

Data Management – Just because you have access to the data doesn't mean you have a data MANAGEMENT process!



ATT vs AHT



- Client Performance Reports
- ATT (Average Talk Time) was showing **higher** than AHT (Average Handle Time)
- “Is this right?”

Your Data Should Be **CLEAR**™

Our Data Management Framework

Collect – Data Collection/Centralized

Log – Data Format/Integration

Evaluate – Data Analysis

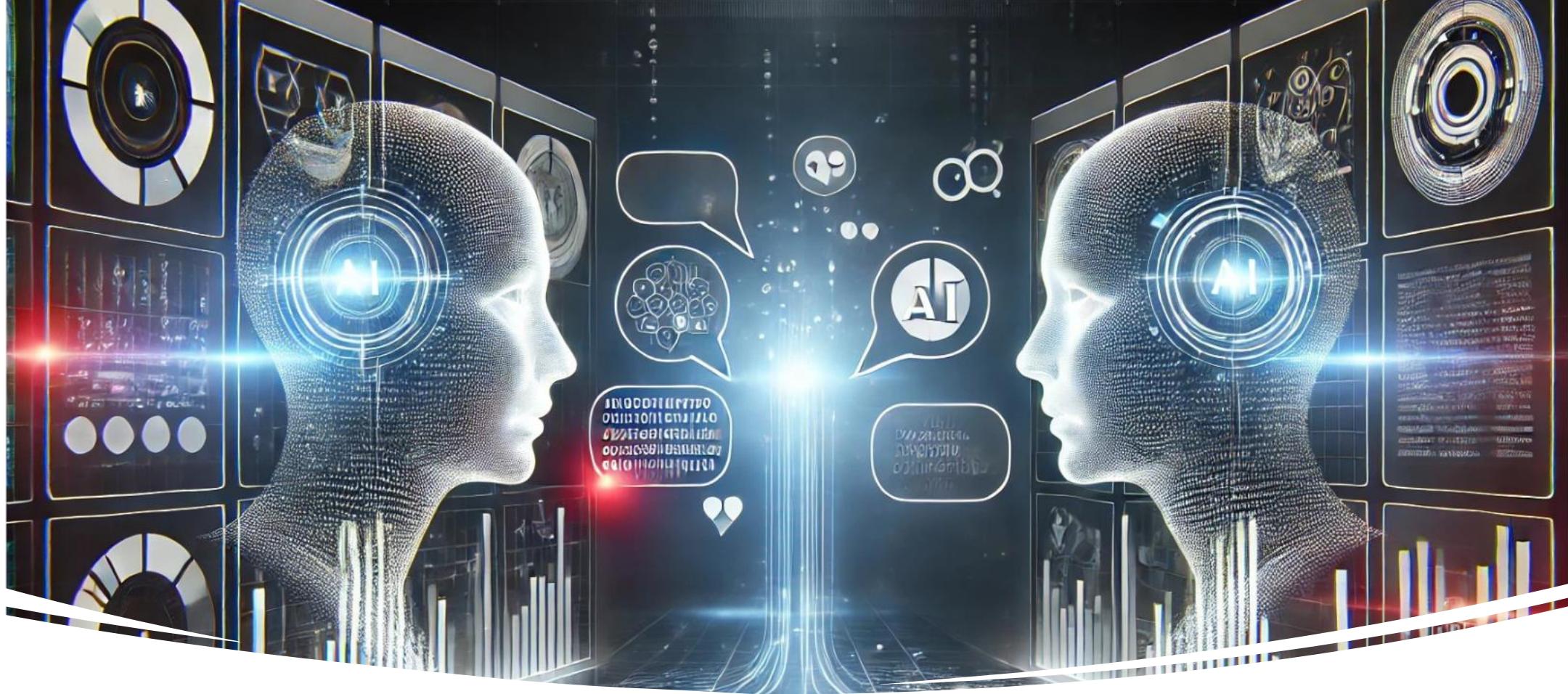
Arrange – Data Presentation

Remove – Data Retention



Secret #2

Data Integration – Just because you have Technology doesn't mean you have a data integration!



ACD vs WFM

- Establish single point of Truth!
- Understand WHY data is mis-match.
- Decide on what to do!

Data Logging: Preparing Data for Use

Processing involves cleaning, formatting, and integrating raw data to make it usable.

- **Example:**

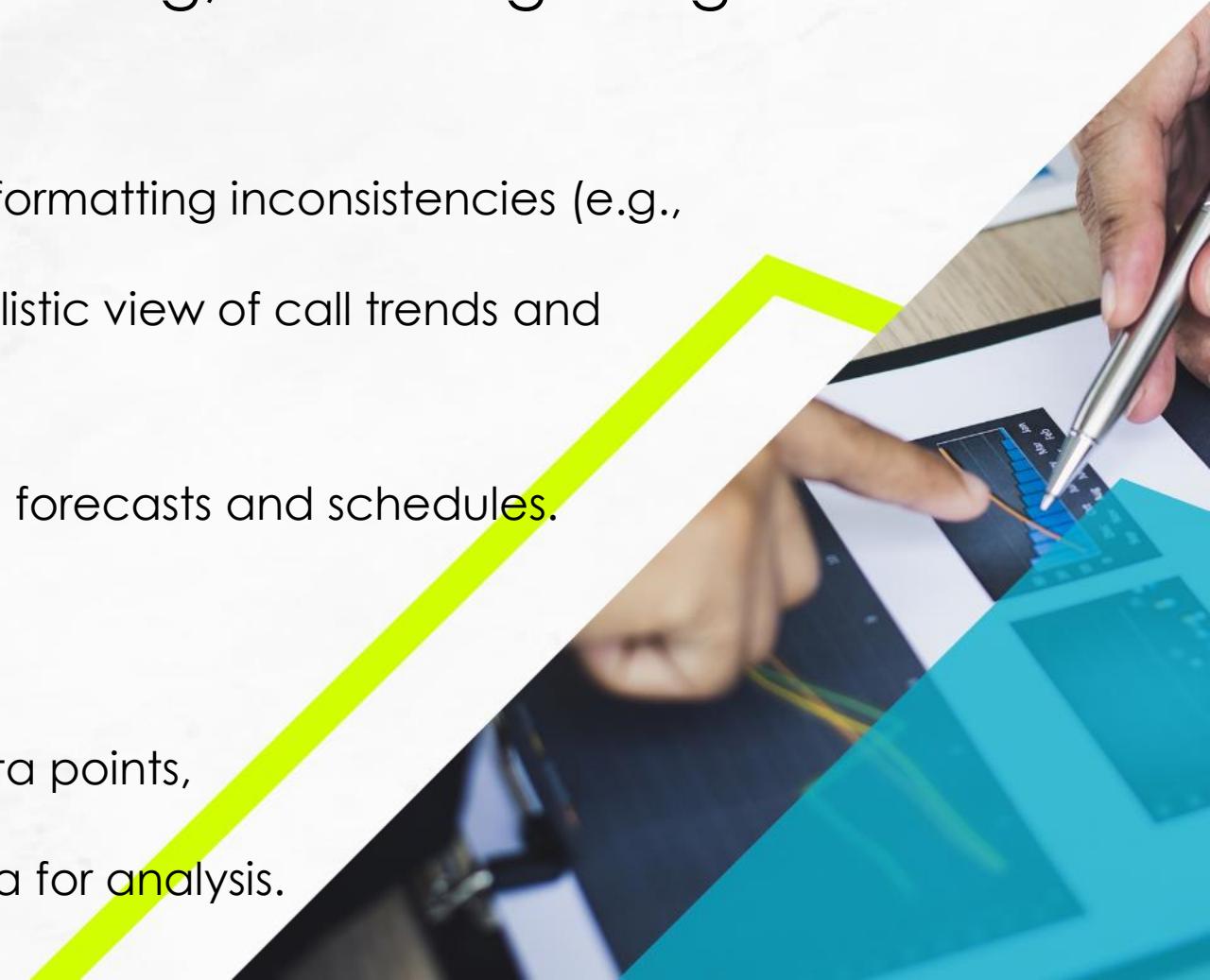
- Removing duplicate call logs or correcting formatting inconsistencies (e.g., time zones).
- Integrating ACD and CRM data to get a holistic view of call trends and customer behavior.

- **Why This Is Important:**

- Clean and consistent data reduces errors in forecasts and schedules.
- Ensures data is compatible across systems.

- **How This Works:**

- Identify and address errors (e.g., missing data points, duplicates).
- Use data transformation tools to format data for analysis.



Secret #3

Data Insights – Just because you have
MORE Data doesn't mean you have
INSIGHTS!

12 Agents

Missed Service Levels

VS.

20 Agents

Service Levels Met



Data Evaluation: Gaining Insights

Evaluation/Analysis is the process of reviewing data to identify trends, patterns, and actionable insights.

- **Example:**

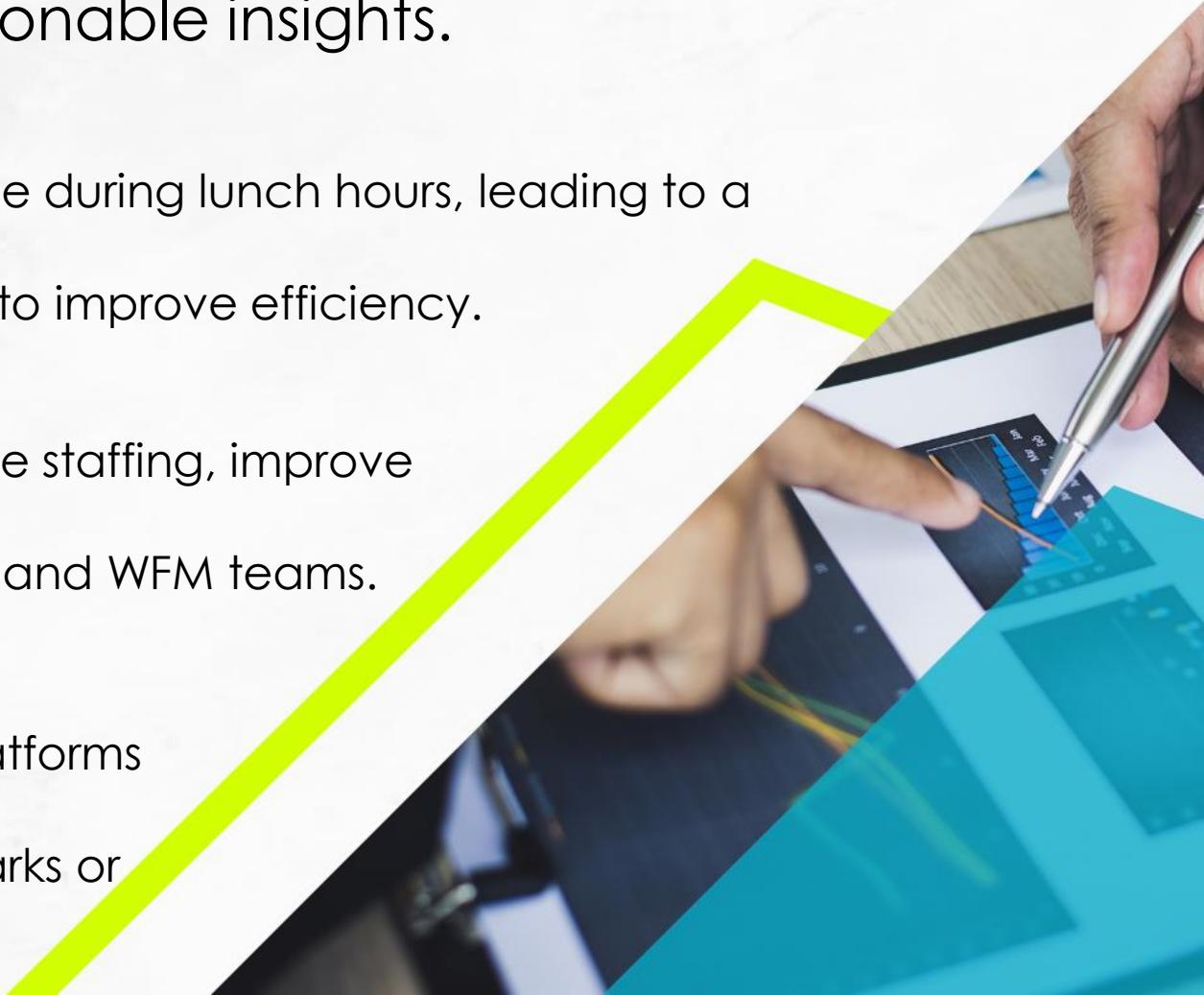
- Identifying a trend of increased call volume during lunch hours, leading to a staffing adjustment.
- Analyzing agent adherence to schedules to improve efficiency.

- **Why This Is Important:**

- Enables data-driven decisions that optimize staffing, improve CX, and reduce costs.
- Provides actionable insights for leadership and WFM teams.

- **How This Works:**

- Use WFM tools or business intelligence platforms to visualize trends and metrics.
- Compare current data against benchmarks or historical trends.



Key Points to Remember

- ✓ Strong Data is the Foundation of WFM
- ✓ Data should be CLEAR!
- ✓ Standardization, Validation, Automation
- ✓ Better Data = Better Outcomes
- ✓ Data doesn't Fix Itself, You need STRATEGY



Because You Are **HERE TODAY!**

FREE Data Management Assessment





Remaining Session In Series

💡 May 21 – Forecasting with Accuracy: In this session, we'll explore best practices for forecasting labor demand using historical data, business trends, and external factors. Learn how to balance accuracy and agility, adjust forecasts for changing conditions, and set your organization up for success with proactive workforce planning.

💡 July 16 – Optimizing Schedules: In this session, we'll explore schedule optimization techniques that maximize productivity while accommodating employee preferences. Learn how to create flexible schedules, and improve operational efficiency without sacrificing employee experience.

💡 September 17 – Managing Real Time: In this session, we'll cover the key components of effective intraday management, from monitoring performance in real-time to making proactive staffing adjustments. Discover how to improve adherence, reduce service disruptions, and ensure your team remains agile in an ever-changing environment.

Grab your **FREE** Gift!

**Just Cover Shipping*



Juanita Coley
CEO, SOLID ROCK CONSULTING, AUTHOR,
CONTACT CENTER WHISPERER

