

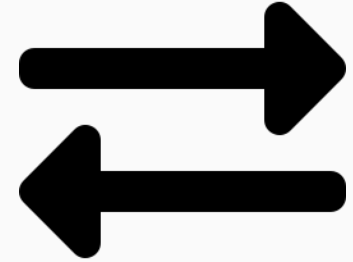
# Scheduling: In an AI Era

Humans + AI = An Expanded Workforce



# Your Schedule Just Changed

*Whether you built for it... or not.*



**In Session 1, we faced the data. In Session 2, we rebuilt the forecast.**

Now let's talk about what happens when that forecast meets a live schedule.

The Shift

# Scheduling Is No Longer About Filling Shifts.

*It's about orchestrating work across humans, bots, and automated workflows.*

*“You no longer manage just people.  
You manage work — across humans and AI.”*

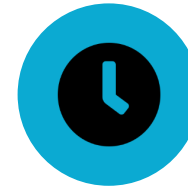
# The Foundation This Session Builds On



## SESSION 1

### The Data

AI is labor now, not just a tool — and deflection rate is not the same thing as capacity.



## SESSION 2

### The Forecast

We stopped forecasting contacts and started forecasting workload, complexity, hand-offs, and all.

- Work Redesign
- Capacity Illusion

# From Shift-Filling to Work Orchestration

## THE OLD MODEL

- ✗ Schedule to headcount and forecasted call volume
- ✗ One static schedule per agent, built weeks out
- ✗ Bots and automation live outside the schedule
- ✗ Adjustments happen manually, after service levels slip

## THE EXPANDED WORKFORCE™ MODEL

- ✓ Schedule to task mix, complexity, and real-time capacity
- ✓ Dynamic blocks that flex as human + bot capacity shifts
- ✓ Bots are scheduled resources, not background noise
- ✓ Rebalancing is built into the model, not a fire drill

# SO WHAT'S WRONG

These are the 3 SCHEDULING MISTAKES organizations are making  
when implementing AI in the workforce

*And this is where WFM leaders have an opportunity to LEAD.*

# MISTAKE #1



## Scheduling Bots and Humans in Separate Universes

Most organizations forecast and staff their human workforce, then treat automation as a side project running quietly in the background. The result: schedules built as if the bots don't exist, and capacity planning that misses a huge share of the actual work getting done.

### WHAT THIS LOOKS LIKE

*A workforce management team builds next month's schedule off historical human handle time never touching the automation roadmap sitting in a completely different tool, with a completely different owner.*

# MISTAKE #2



## Static Schedules in a Dynamic Environment

Schedules built weeks in advance assume the mix of work stays put. But in a hybrid environment, the ratio of human-to-bot-handled work shifts week to week — sometimes day to day — as automation adoption grows and interaction complexity changes.

### WHAT THIS LOOKS LIKE

*Service levels dip every time a new automation goes live, because the schedule underneath it never adjusted to the new task mix — leaders discover the gap after it's already cost them.*



# MISTAKE #3



## No Task-Level Visibility to Schedule Against

You can't build a precise schedule on an imprecise picture of the work. Without visibility into what happens at the task level — which interactions bots handle end-to-end, which they hand off, and where new human work shows up — scheduling defaults back to guesswork dressed up as a plan.

### WHAT THIS LOOKS LIKE

*Leaders know the deflection rate. They don't know what the freed-up minutes are actually being spent on — so the next schedule is built on an assumption, not a fact.*

# Building the Dynamic Schedule

*Four moves that turn The Expanded Workforce™ framework into a schedule your team runs on tomorrow morning.*



## 01 Task-Based Capacity Modeling

Build the model on task type and complexity, not headcount and raw volume.



## 02 Human + Bot Hand-off Windows

Schedule the moments work transfers between automation and people, not just the people.



## 03 Real-Time Rebalancing

Build in the mechanism to flex the schedule as the human/bot mix shifts intraday.



## 04 Employee Experience Guardrails

Protect predictability and fairness so flexibility doesn't become burnout.

# Task-Based Capacity Modeling

Instead of asking “how many people do we need for this volume,” the model asks “how much of each task type exists, and who — human or bot — is best suited to handle it.”



## Bot-Owned Tasks

Fully automatable, high-volume, low-complexity work. Scheduled as automation capacity, not human capacity.



## Hand-Off Tasks

Starts with the bot, escalates to a human. Needs coverage timed to hand-off volume, not raw call volume.



## Human-Owned Tasks

High-complexity, high-empathy, or exception work. This is where skilled headcount should concentrate.

# Hand-offs, Rebalancing & the EX Guardrail



## Schedule the hand-off, not just the headcount

Identify peak hand-off windows — when bot-to-human escalations spike — and staff those windows specifically, even if overall volume looks flat.



## Build a rebalancing trigger, not just a rebalancing hope

Define in advance what signal moves people between queues or task types intraday — a wait-time threshold, an escalation spike, a bot outage.



## Protect the human on the other side of the flexibility

Dynamic doesn't mean unpredictable for the agent. Guardrail the schedule with minimum notice windows, capped last-minute changes, and fairness rules.

# Your First 30 Days to a Dynamic Schedule

**01**

## Audit the task mix

Map every interaction type to bot-owned, hand-off, or human-owned.

**02**

## Find the hand-off windows

Pull the data on when escalations actually spike, not when you assume.

**03**

## Draft the trigger rules

Write down the specific signals that will move people between queues.

**04**

## Pilot with guardrails

Test on one queue with clear EX protections before scaling org-wide.

## In Summary

# The Future of Scheduling Is Orchestration

### Volume ≠ Capacity

Lower interactions does NOT automatically mean a simpler schedule. Capacity is driven by total workload.

### Bots Are Scheduled Resources

AI is part of the workforce now — it needs to be scheduled, monitored, and rebalanced like any other resource.

### WFM Must Lead

The future WFM leader is a workload strategist, a workforce architect, and a driver of measurable impact.

*“In the AI Era, we are no longer scheduling shifts. We are orchestrating work.”*



# Juanita Coley

Founder & CEO  
Thee Contact Center Whisperer



Data. Forecasting. Scheduling. Now build the Expanded Workforce — take the Workforce Redistribution Audit™ to see where your organization stands.

Juanita is a dedicated and results-driven professional recognized for her strong work ethic, reliability, and collaborative approach. She brings a high level of integrity and attention to detail to everything she does, consistently contributing to team success and organizational goals. Known for her excellent interpersonal skills, Juanita builds positive relationships and fosters a supportive environment while maintaining a focus on delivering quality outcomes.

