

**Panel  
Discussion**

**February 2021**

**Dave Hoekstra, WFM  
Evangelist, Calabrio**



**Nathan Stearns, VP,  
WFO Product  
Strategy, NICE**



**Preparing for  
the Future of  
WFM**



# WFM DIGITAL CHANNEL MANAGEMENT

CrmXchange  
23 February 2021



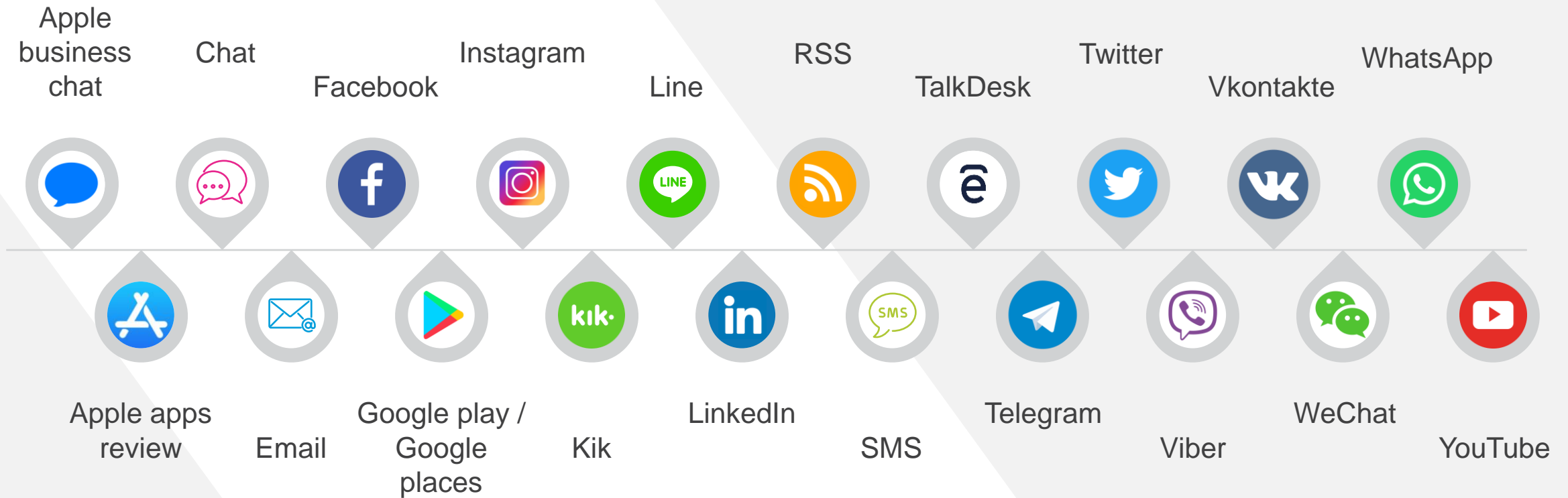
# agenda

Digital Channels, Multi-channel, & Omni-channel

What's New for WFM

Q&A

# What are Digital Channels?\*



\*channels supported by NICE inContact Brand Embassy

# What is Driving the Interest in Digital Channels?

- Levels the playing field
- Cost effective
- Improves revenues
- Anytime / anyplace / any-device interactions
- Survival
- Pandemic

<https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/the-covid-19-recovery-will-be-digital-a-plan-for-the-first-90-days#>

<https://digitalmarketingphilippines.com/12-reasons-why-digital-marketing-can-help-you-grow-your-business>

<https://www.smartinsights.com/digital-marketing-strategy/digital-strategy-development/10-reasons-for-digital-marketing-strategy/>

McKinsey  
& Company

“...we have vaulted five years forward in consumer and business digital adoption in a matter of around eight weeks...”

May 2020

# Multi-channel & Omni-channel

Multi-Channel	Omni-channel
“Many” channels	“All” channels
Includes traditional voice channel and digital channels	
Customers engage with the organization through a communication mode of choice	
Channel usage by customers is treated as silos independent from one another	Channel usage by customer is treated as a single experience across the channels used for a single interaction

## Fundamental Question for WFM

Are the processes of WFM concerned with the entire customer experience across all channels, or the specific transactions that consume an employee’s time?

# What's New for WFM



# The WFM Process

DATA INTEGRITY & ACQUISITION

STAFF REQUIREMENT CALCULATION

SCHEDULE OPTIMIZATION

CHANGE MANAGEMENT

- The WFM process is a series of ongoing, overlapping steps that follow a particular order
- At any time, on any day, one or more of the process steps is active and applied to one or more dates, from today and up to many years into the future
- Traditionally, the WFM processes assume:

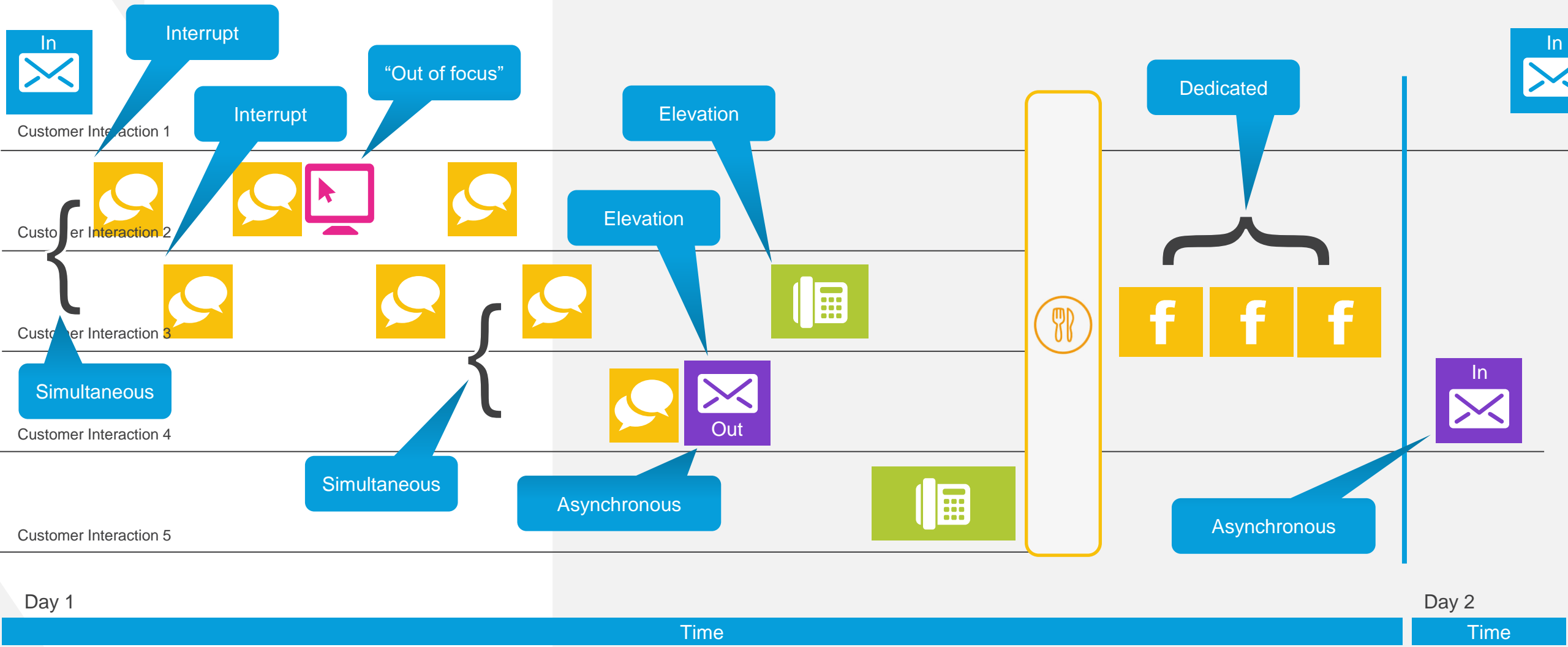
a sequential flow of work

a contiguous work stream



# Work is No Longer Sequential & Contiguous...

....a series of transactions handled by a single employee



# Digital Channel Management & WFM

Immediate Response & Deferred Response Contacts

Deferred Work Forecast Based on Capacity

Simultaneous Interactions  
Session Concurrency within and across Channels



Interruptible Interactions  
Channel Interrupt Priorities

Long Asynchronous Interactions



Elevated Interactions



Employee Cognitive Load Limits



Dedicated Task Time Limits

AHT Longer Than Stat Interval

Employee Self Select Work Items

**Data Integrity & Acquisition**

**Staff Requirement Calculation**

**Schedule Optimization**

**Change Management**

# Digital Channel Management & WFM

	Data Integrity & Acquisition	Staff Requirement Calculation	Schedule Optimization	Change Management
<p><b>Immediate Response &amp; Deferred Response Contacts</b></p>	<p>Reporting of Service Objectives for Deferred Work</p>	<p>Erlang Erlang with Adjustments Workload New Paradigm</p>	<p>Optimization &amp; Allocation of Multi-skilled Employees' Time to each Work Stream</p>	<p>Backlog Management Intraday Reforecast Analysis of Supply Capacity Changes</p>
<p>Deferred Work Forecast Based on Capacity</p> <p>Simultaneous Interactions Session Concurrency within and across Channels</p> <p>Interruptible Interactions Channel Interrupt Priorities</p>				

# Digital Channel Management & WFM

	Data Integrity & Acquisition	Staff Requirement Calculation	Schedule Optimization	Change Management
Immediate Response & Deferred Response Contacts				
<b>Deferred Work Forecast Based on Capacity</b>		Interval-specific Deferrals Subject to Interval-specific Staff Capacity	Optimization & Allocation of Multi-skilled Employees' Time to each Work Stream	Backlog Management Intraday Reforecast Analysis of Supply Capacity Changes
Simultaneous Interactions Session Concurrency within and across Channels				
Interruptible Interactions Channel Interrupt Priorities				
Long Asynchronous Interactions				
Elevated Interactions				

# Digital Channel Management & WFM

Immediate Response & Deferred Response Contacts

Deferred Work Forecast Based on Capacity

## Simultaneous Interactions

Session Concurrency within and across Channels



### Data Integrity & Acquisition

“In focus” AHT  
 “Elapsed” AHT  
 Intra-interaction Utilization  
 Intra-interaction Messaging

### Staff Requirement Calculation

Max Utilization Objective  
 New Speed of Answer Objectives  
 New Speed of Response Objectives

### Schedule Optimization

Interpretation of Multi-session Handling Limits per Employee

### Change Management

Backlog Management  
 Intraday Reforecast  
 Analysis of Supply Capacity Changes

Interruptible Interactions  
 Channel Interrupt Priorities

Long Asynchronous Interactions

Elevated Interactions

Employee Cognitive Load Limits

Dedicated Task Time Limits

# Digital Channel Management & WFM

<p>Capacity</p> <p>Simultaneous Interactions Session Concurrency within and across Channels</p>	<p><b>Data Integrity &amp; Acquisition</b></p>	<p><b>Staff Requirement Calculation</b></p>	<p><b>Schedule Optimization</b></p>	<p><b>Change Management</b></p>
<p><b>Interruptible Interactions</b></p> <p><b>Channel Interrupt Priorities</b></p>	<p>“Parked” AHT</p>	<p>Subject to Data Integrity &amp; Acquisition</p>	<p>Interpretation of Work Item Interruptability</p>	<p>Backlog Management</p> <p>Intraday Reforecast</p> <p>Analysis of Supply Capacity Changes</p>
<p>Long Asynchronous Interactions</p> <p>Elevated Interactions</p> <p>Employee Cognitive Load Limits</p> <p>Dedicated Task Time Limits</p> <p>AHT Longer Than Stat Interval</p>				

# Digital Channel Management & WFM

Simultaneous Interactions

Session Concurrency within and across Channels

Interruptible Interactions

Channel Interrupt Priorities



## Long Asynchronous Interactions

Elevated Interactions

Employee Cognitive Load Limits

Dedicated Task Time Limits

AHT Longer Than Stat Interval

Employee Self Select Work Items

### Data Integrity & Acquisition

### Staff Requirement Calculation

### Schedule Optimization

### Change Management


“Hybrid” AHT  
Hybrid Transaction Counting  
Work Time Concatenation

Subject to Data Integrity & Acquisition

Subject to Data Integrity & Acquisition

Backlog Management  
Intraday Reforecast  
Analysis of Supply Capacity Changes

# Digital Channel Management & WFM

<p>Interruptible Interactions Channel Interrupt Priorities</p> <p>Long Asynchronous Interactions</p>	<p><b>Data Integrity &amp; Acquisition</b></p>	<p><b>Staff Requirement Calculation</b></p>	<p><b>Schedule Optimization</b></p>	<p><b>Change Management</b></p>
<p></p> <p><b>Elevated Interactions</b></p>	<p>“Hybrid” AHT Hybrid Transaction Counting Work Time Concatenation</p>	<p>Subject to Data Integrity &amp; Acquisition</p>	<p>Subject to Data Integrity &amp; Acquisition</p>	<p>Backlog Management Intraday Reforecast Analysis of Supply Capacity Changes</p>
<p>Employee Cognitive Load Limits</p> <p>Dedicated Task Time Limits</p> <p>AHT Longer Than Stat Interval</p> <p>Employee Self Select Work Items</p>				



# Digital Channel Management & WFM

Channel Interrupt Priorities

Long Asynchronous Interactions

Elevated Interactions



## Employee Cognitive Load Limits

### Data Integrity & Acquisition

Employee Load-based Performance Data

### Staff Requirement Calculation

Cognitive Load Limit Adjustments to Base Requirements

### Schedule Optimization

Cognitive Load Limit Adjustments to Individual Employee Contribution

### Change Management

Backlog Management  
Intraday Reforecast  
Analysis of Supply Capacity Changes

Dedicated Task Time Limits

AHT Longer Than Stat Interval

Employee Self Select Work Items

# Digital Channel Management & WFM

Long Asynchronous Interactions

Elevated Interactions

Employee Cognitive Load Limits

**Data Integrity & Acquisition**

**Staff Requirement Calculation**

**Schedule Optimization**

**Change Management**

**Dedicated Task Time Limits**

Optimization of  
Min/Max Task Time  
Constraints &  
Fairness

Backlog  
Management  
Intraday  
Reforecast  
Analysis of Supply  
Capacity Changes

AHT Longer Than Stat Interval

Employee Self Select Work Items

# Digital Channel Management & WFM

Elevated Interactions

Employee Cognitive Load Limits

Dedicated Task Time Limits

**Data Integrity & Acquisition**

**Staff Requirement Calculation**

**Schedule Optimization**

**Change Management**

**AHT Longer Than Stat Interval**

New Paradigm for Carryover Work

Cross-interval Optimization of “Engaged” Employee

Backlog Management  
Intraday Reforecast  
Analysis of Supply Capacity Changes

Employee Self Select Work Items

# Digital Channel Management & WFM

Employee Cognitive Load Limits

Dedicated Task Time Limits

AHT Longer Than Stat Interval

**Data Integrity & Acquisition**

**Staff Requirement Calculation**

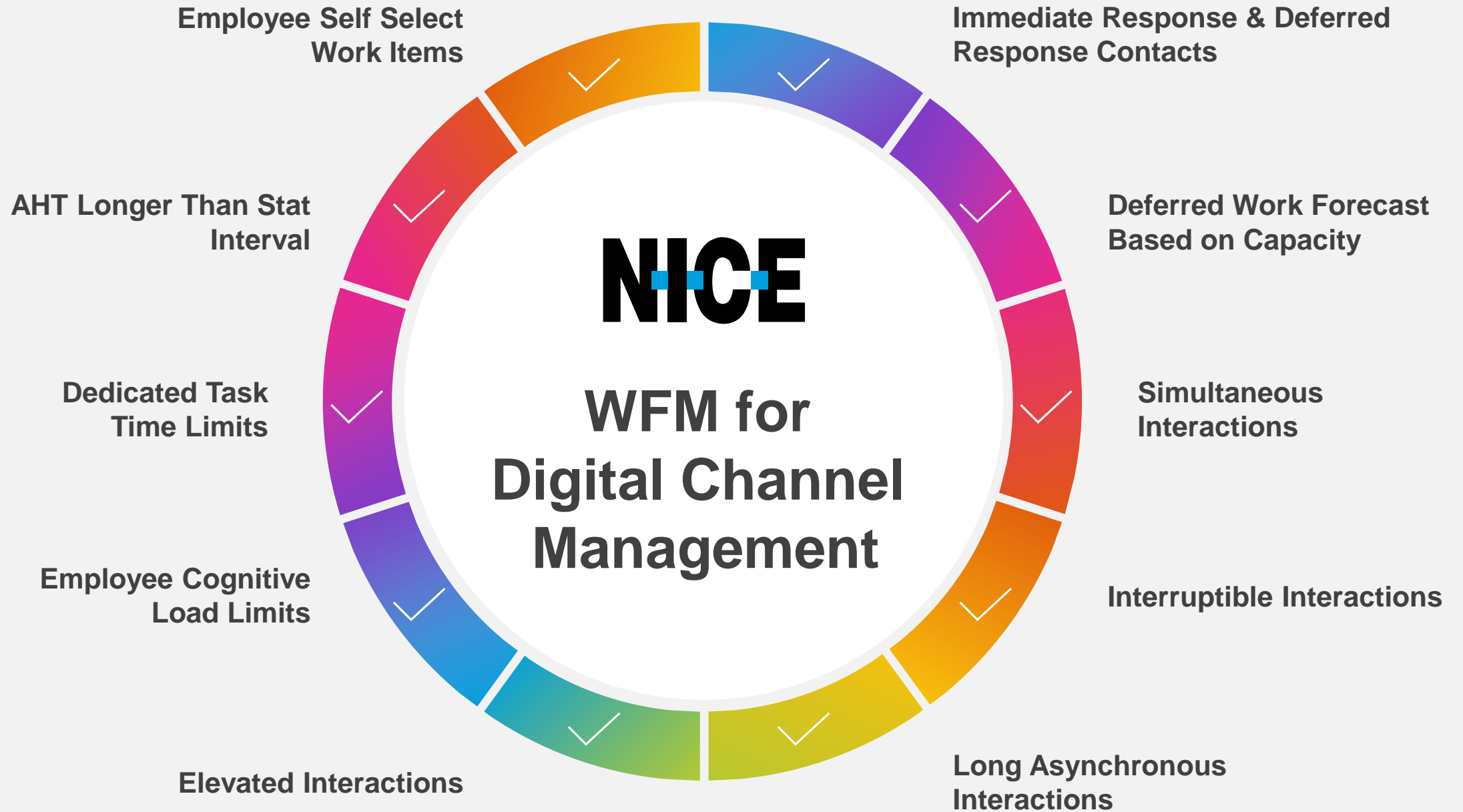
**Schedule Optimization**

**Change Management**

**Employee Self Select Work Items**

Employee Behavior AI

Backlog Management  
Intraday Reforecast  
Analysis of Supply Capacity Changes





Thank You

**NICE**

# Preparing for the future with Calabrio WFM

MORE WFM THAN EVER. MORE THAN WFM.

**CALABRIO™**



# Who is Calabrio

SINCE OUR FOUNDING IN 2007, CALABRIO HAS BECOME THE FASTEST-GROWING COMPANY IN EMPLOYEE AND CUSTOMER

## ENGAGEMENT.



**HEADQUARTERED IN MINNEAPOLIS, MN**  
(Offices across North America, Europe and Asia-Pacific)



**MORE THAN 1 BILLION**  
calls recorded annually



**MORE THAN 700**  
employees worldwide



Installed on  
**2 MILLION DESKTOPS**



**6,000+**  
customers worldwide



Contact center software for  
**5 to 50,000 seats**



**275**  
global partners



**7X TOP WORKPLACE WINNER**



# Demands of the New Era

## WHY THE MODERN CONTACT CENTER NEEDS AGILITY

- Remote employees need more autonomy, flexibility & personalization
- Greater customer and workforce intelligence – know your business inside and out
- Increased automation and process optimization to lower costs and handle change
- Customers expect wider channel access to brands
- Vitality of cloud for scalability & remote operations
- Competition for employee recruitment & retention as no longer bound by center location

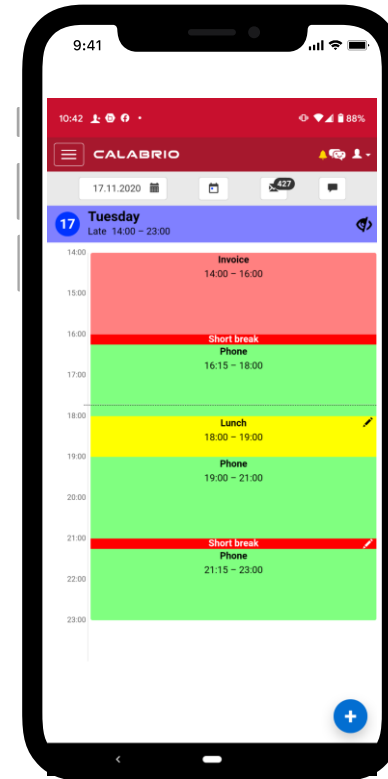


# Mobile App

ENGAGE YOUR SCHEDULE ON YOUR TERMS.

Access information when you want, how you want, with minimal leg work required from operations

- ✓ **Easy to Deploy**
- ✓ **Immediate Agent Updates**
- ✓ **Same Interface as Desktop View**
- ✓ **Works on iOS and Android**
- ✓ **No Additional Charge to Implement**
- ✓ **Zero Maintenance**
- ✓ **Streamlined Communications**
- ✓ **Zero Loss of Functionality from Main View**
- ✓ **Updates Automatically**
- ✓ **Push Notifications for Updates**



## Agent Self-Scheduling

- Flexible scheduling environment where employees have more of a voice
- Streamlines processes related to lunch, breaks and other activity requests through self-scheduling automation
- Freedom from inflexible planning
- Freedom for employees

# Meet Grant.

## INTRADAY AUTOMATION REIMAGINED

***"Hi, I'm Grant the chatbot.  
I will be your personal assistant to help your organization achieve a better working experience for all."***



**Explore how Grant helps improve our customers' lives**



**Improve work/life balance**



**Flexible Intraday Planning**



**Improved Customer Experience**



# Thank You

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