How To Choose a WFM Provider
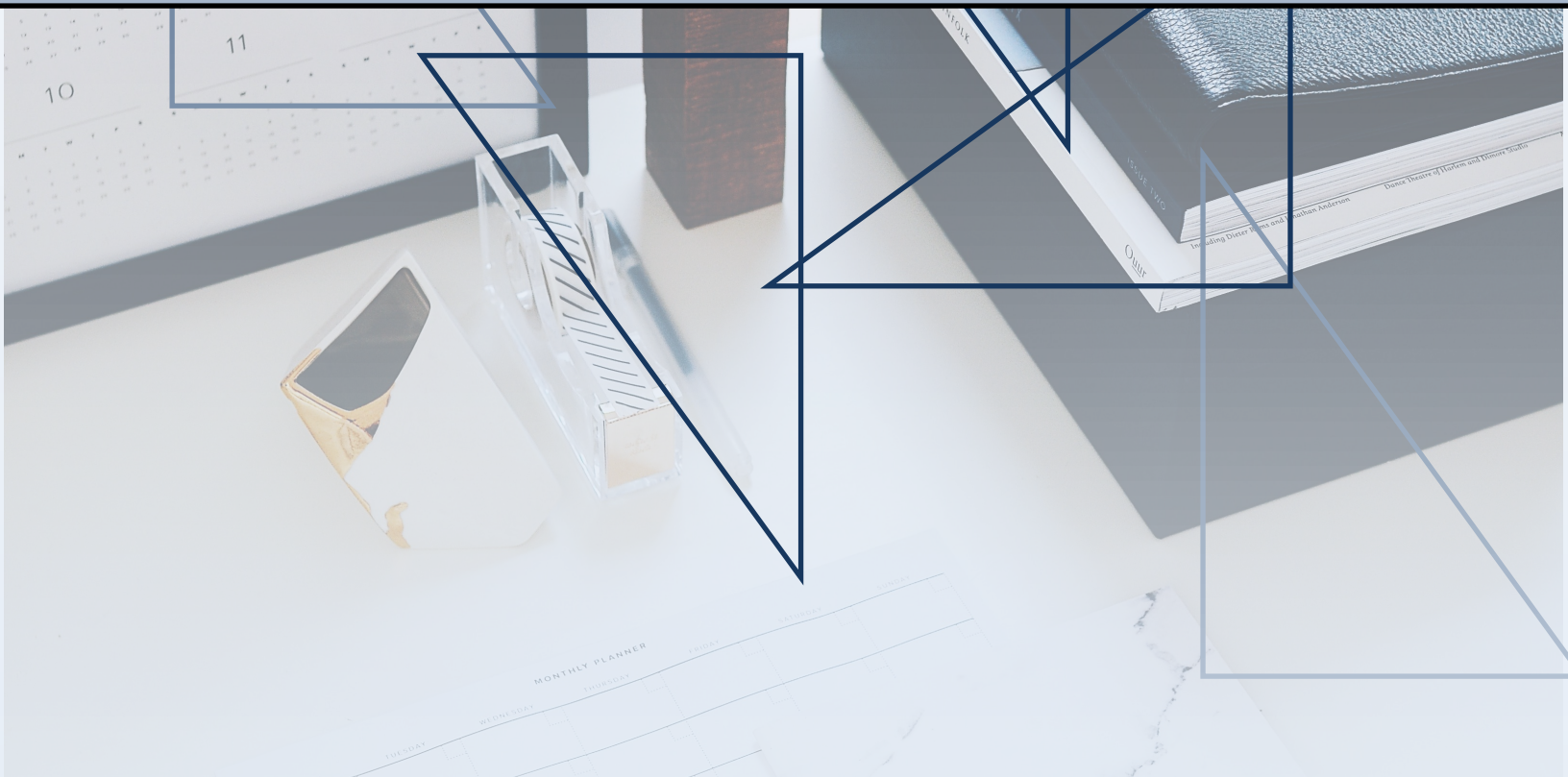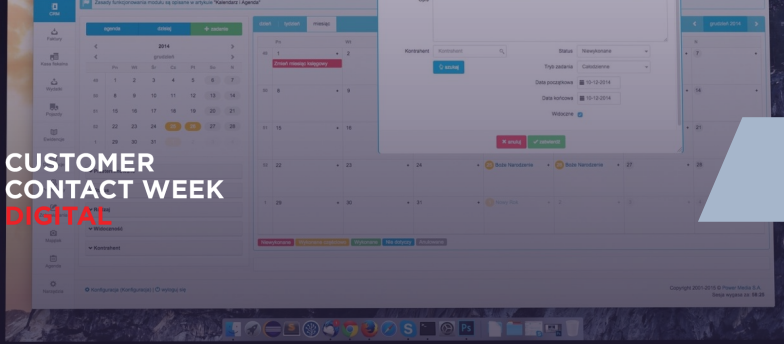
How To Choose A WFM Provider

Author: Kindra Cooper

While the study of economics in a nutshell is about the efficient allocation of scarce resources, the same can be said for workforce optimization in contact centers. Every contact center leader's job is to balance the omnipresent tension between achieving expected service levels and economizing operational costs. For many contact centers, a third source of tension is managing agent turnover, thereby recasting WFM as the complex art of balancing the employee experience, customer experience and contact center budgets.

Workforce management is an integrated set of processes contact centers use to maximize their chances of simultaneously optimizing all three, including:

1. Forecasting labor requirements based on the expected volume of customer interactions

2. Creating and managing staff schedules to accomplish particular tasks on a day-to-day and hour-by-hour basis

3. Responding to and managing unexpected changes in staffing, incoming queries etc.

4. Tracking employee performance and scheduling training and development

These procedures were once done manually using Excel spreadsheets, but WFM systems automate the process while providing insight into business metrics such as historical call volume, employee performance and labor costs.

Most importantly, WFM calculates the exact number of employees needed to complete a particular job at a given time during the day, week or month, using AI to generate predictions from historical data. While WFM makes less sense for the typical 9-to-5 workforce, organizations in sectors like insurance, banking and healthcare with highly time-sensitive tasks that pay employees on an hourly basis are increasingly using it.

> "Workforce management in contact centers is the practice of getting the right number of appropriately skilled resources available to handle the contact center's forecast workload within the desired service goals."
> - Richard Lawrence, senior product manager at TalkDesk
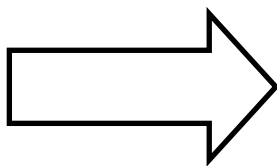
What does a Workforce Management System Do?

Automated staff scheduling

Given flexible shift patterns, including flexi-time, remote and part-time work, there can be huge variability in staff schedules and availability within the workforce. An AI-powered WFM system automatically schedules staff based on variables like vacations, availability, workload and absences. Some systems even offer expanded features like skills-based scheduling, where agents are allocated to certain channels based on their subject expertise.

Forecasting and budgeting

WFM allows companies to use calculated forecasts to optimize staff deployment and manage workloads as labor demands change. AI and machine learning makes scheduling predictions more sophisticated by generating predictive models from historical data.

Tracking time and attendance

Aside from enabling employees to clock in and out and request time off, WFM reveals attendance patterns and helps companies better predict changes in demand as well as manage planned or unplanned staff absences. Some systems even predict attrition based on historical data, which empowers contact centers to preemptively recruit new staff to minimize attrition costs. By analyzing WFM data, companies can pinpoint potential gaps in coverage, improve payroll accuracy and address chronic absenteeism or tardiness.

Employee performance management

Quality assurance tools can be integrated with WFM, ensuring contact center metrics are shared with the entire contact center workforce instead of remaining the exclusive purview of the contact center manager. This empowers agents to track their own performance and take ownership of their work, while giving contact center leaders a better understanding of employee engagement and opportunities for training and development.

Integration is even easier when these tools are part of the same suite of tools and allow for a central point of administration for users.

Compliance

All   contact centers are beholden to state, federal and local employment laws. Others are also required to honor consumer rights laws for their specific product or service offering, such as insurance policies and debt collection. WFM helps track compliance and enables the company to easily communicate policy changes to the entire workforce. The system can also track required certifications and training for specific roles – such as operating heavy machinery or dispensing medical advice – missed breaks, labor standards, family and sick leave requirements as well as union agreements.

Payroll and benefits administration

Companies employing hourly, minimum-wage workers are gravitating towards employee-determined pay schedules rather than sticking to a traditional biweekly or monthly pay cycle. WFM allows employees to opt into custom payment options such as end -of-shift payments, syncs timesheets to payroll and provides audit-ready custom reports.

Vacation and leave planning

Most WFM systems are employee-facing and available through a companion mobile app, allowing workers to request time off and access schedules and PTO balances at their convenience, rather than going through HR. Meanwhile, managers can track staffing levels, view time-off calendars and proactively identify scheduling conflicts.

Intraday management

In many contact centers, workload forecasts are completed months in advance. However, emergencies can happen. Extraneous incidents may cause an unforeseen spike in call volume or customer complaints, such as technical faults/outages, a product recall, unannounced marketing campaigns, negative press coverage or even a national crisis such as severe weather or an earthquake. Exempting such exceptional circumstances, call centers are often afflicted by day-to-day contingencies such as higher-than-average absenteeism or fluctuations in call volume. Intraday management responds to staff shortages in real-time by redeploying agents in proportion to call volume.

With these capabilities combined, WFM benefits organizations by improving labor planning, optimizing employee productivity, reducing operational costs and improving customer service. It also increases operational agility, so companies can adjust staffing levels as production schedules and market demands change. Furthermore, it offloads administrative task from the HR department as well as the WFM manager, freeing both to focus on strategic initiatives.

Changes to WFM in recent years

Omnichannel contact centers

Contact centers have evolved from their previous emphasis on inbound call handling to fielding customer interactions through a variety of channels, including email, chat, social media and even online customer review sites like Yelp, Google and Better Business Bureau. Given a rising preference among consumers for self-service channels, contact center agents are also tasked with content creation as well as updating and maintaining knowledge bases.

Today's agents are accustomed to handling multiple customer interactions simultaneously by toggling between channels, as opposed to handling one call at a time. While this reduces the cost per interaction, it complicates the process of forecasting the required manpower commensurate with incoming customer queries.

Each of these channels has its own metrics and acceptable handle times – an email response time of 20 minutes is the industry standard, but most businesses wouldn't dream of putting a customer on hold for the same amount of time. Nevertheless, customers expect a consistent level of service across channels, so companies can't afford to under-staff. The rise of asynchronous messaging on SMS, Whatsapp and Apple Business Chat, in which the customer starts and stops the conversation at their convenience, is another recent development that makes WFM less straightforward than it used to be.

> "Omnichannel routing means the same agents are handling several different types of work, and customers expect to get consistent treatment regardless of which channel they choose. This is a significant challenge for WFM because different channels will have different forecasting behaviors and different data sets to be tracked for intraday management." - Richard Lawrence, senior director of product management at TalkDesk

Modern workforce expectations

Workforce scheduling in a 24/7, always-on contact center is decidedly more complicated than in the rigidly 9-to-5 contact centers of old. A concurrent increased demand for work/life balance has nudged contact centers to adopt shift patterns designed to attract specific types of recruits. For instance, stay-at-home parents searching for supplemental income would appreciate working remotely, while university students might favor flexi-time or part-time schedules.

" "The modern workforce expects more attention to work-life balance, including options such as schedule flexibility and gig work, which in turn require specific feature support within WFM." - Richard Lawrence "

AI and machine learning

AI-powered WFM automates workflows and processes previously handled by humans, facilitating data-driven forecasting and empowering organizations to respond in real-time to call fluctuations. Predictive models help with intraday management and longer-term business continuity plans, where contact centers can prepare for extremities like labor strikes or natural disasters. Furthermore, cloud infrastructure allows WFM to be deployed and supported with significantly less time and cost than traditional on-premise systems.

How can a WFM tool help contact centers achieve their goals?

Before CX strategy became a standard operating procedure for most businesses, contact centers were perceived as cost centers. By shrinking labor costs and maximizing productivity, contact centers can mitigate this perception and more easily make the case for further CX investments, such as building self-service platforms and acquiring tools for gleaning 360-degree view of the customer. WFM also helps contact centers achieve the following business goals:

Improve customer satisfaction

WFM ensures customers are handled in a timely manner by agents with the right subject matter expertise, as staff deployment is typically based on a desired average speed to answer. Such allocation is likely to improve first call resolution and average handle time.

Increase agent satisfaction

Agents benefit from more a consistent schedule and workload, scheduling is more fairly enforced and schedule requests are to promptly.

Reduce costs

Staffing efficiently reduces the costs of overstaffing (and customer attrition resulting from understaffing), while automated processes reduce administrative overheads associated with having a human do WFM manually.

Increase revenue

Customers who are answered promptly by a happy agent have a high conversion and retention rate.

What type of features should I look for?

WFM tools tend to be very feature-rich due to the complexity and variation around forecasting and scheduling needs between contact centers. Typical features for WFM systems fall into a few categories: forecasting, scheduling, intraday Management, and request management.
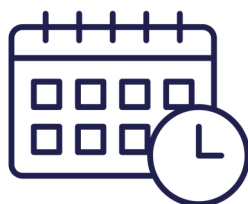
1. Forecasting features

- Collecting historical data to use for forecasts – When automated, this feature saves time and reduces errors in the collection of relevant data

- Forecasting future customer interaction volumes and handle times based on history – By providing "best practice" options, forecasting tools can improve the accuracy of these predictions

- Calculating staffing requirements based on the forecasted work – Effective systems will offer calculations based on the type of work and include support for specific speed to answer targets and staff shrinkages, which improves scheduling effectiveness. Modern systems should take into account the use of multiple skills and omnichannel routing. Some systems even offer a "what if" function so managers can see the probable outcome of changing call handle times, labor costs, operating hours and other variables.

2. Scheduling features

- Automatic generation of schedules to match forecast staffing requirements – This is the core feature of effective WFM, providing a better match to requirements in much less time than what can be achieved with manual scheduling

- Rules to ensure schedules meet legal and social expectations about what is an acceptable schedule – For example, ensuring that agents are scheduled for an appropriate number of hours. These rules reduce time spent checking schedules, improve legal compliance, and increase agent satisfaction. These rules are often critical to customers with agents in multiple locations that have different legal and cultural expectations

- Event optimization – Tools to reduce administrative effort and help maintain consistent speed of answer when agents need to be scheduled for meetings or other "non-queue" events

3. Intraday management

- Automated collection and display of queue performance statistics throughout the day – Enables managers to see how actual work compares to the forecast so adjustments can be made if the workload is not what was expected

- Schedule adherence displays – Shows managers whether agents are following the schedule, so action can be taken to nudge agents into the correct activities when needed

- Automated actions – Ideally, the system will react automatically to deviations by alerting agents and supervisors of problems, automatically updating forecasts based on the latest data, and proactively solving problems. This greatly improves reaction time and provides a more consistent customer service.

4. Request management

- Options for agents to submit requests for time off, shift trades, or other schedule changes – Centralizing these requests provides more consistency in how they are handled and reduces the administrative burden of handling changes

- Automated approval/denial of requests – Further improves the consistency and reduces cost, while also increasing agent satisfaction due to consistent and timely responses to their requests

- Integration with external tools such as HR systems – Ensures items such as granting time off are carried through to all relevant systems without needing manual intervention

About the Author

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Kindra Cooper is a digital writer and editor for CCW Digital, the global online community and research hub for customer contact professionals. In her role, Kindra writes daily articles and produces podcasts on customer experience, design thinking, UI/UX, brand strategy and more. Her reporting has appeared in various print and web publications covering politics, arts & entertainment, business and architecture.

How-To-Guides Calendar	Publish Date
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How to Choose an AI Provider	Dec 5, 2019

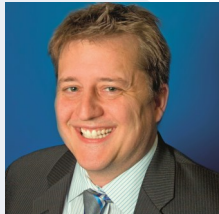## Interested in being a part of a How-To-Guide? Contact Us

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