Creative Scheduling Strategies
Practical Tips for Efficient Call Centre Scheduling
Session Leaders

**Penny Reynolds** is Co-Founder of The Call Center School where she heads up curriculum development. She develops and teaches courses on a wide variety of call centre topics, including workforce management, performance measurement and call centre technologies. She has authored four books: *The Power of One, Power Phrasing, Call Center Staffing: The Complete, Practical Guide to Workforce Management* and *Call Center Supervision: The Complete, Practical Guide to Managing Frontline Staff*. She has also co-authored the five textbooks for University of Phoenix’s call centre certification programme.

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**Dean Couchman** is WFM Expert at injixo, with over 14 years of first-hand Resource Planning experience in various industries covering inbound, outbound, back office and multimedia. 5 years in Professional Services at WFM vendors, delivering projects and support for outsourcers, emergency services, finance sector, e.g. Abtran, Voxpro, Eishtec, several Police Forces, Lloyds TSB, HSBC, Vodafone and many more.

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**Chris Dealy** is Northern Europe Sales Director at injixo (formerly InVision Software), specialists in WFM since 1995. injixo has helped over 300 clients to optimise their workforce, increase productivity and reduce costs. Chris has over 30 years’ experience in improving business efficiency for blue chip organisations. For the last 10 years, he has focused on Workforce Management in contact centres including injixo customers John Lewis, the RAC, the NHS, Computershare, H&M, National Grid and many more.

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The WFM Cycle

- **Reporting, monitoring and adherence tracking**
  - relevant & timely info and time-saving tools – export option
- **On-the-day management**
  - power tools to maintain performance when plan and reality differ
- **Agent interaction**
  - via agent portal
- **Forecasting**
  - using historic data and known special events
- **Calculating staffing requirements**
  - applying correct shrinkage factor
- **Optimised Scheduling**
  - automatically optimising the match between ‘supply and demand’

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The WFM Cycle

- **Forecasting**
  - ...using historic data and known special events

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Starting Point for Scheduling: Staff Numbers

The Real Staff Needed?

\[
\text{Workload} = \text{calls} \times \text{AHT}
\]

Random call arrival

- 90 Required staff
- 83

8:00 A.M. 10:00 A.M.
Shrinkage

- Shrinkage is the paid time during which staff are not available to handle contacts.
- The “bodies in chairs” requirement assumes that all staff are available to handle contacts.
- Inaccurate shrinkage figures lead to the wrong number of staff being scheduled.
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Shrinkage

Examples:

• Paid breaks
• Paid holidays
• Meetings
• Training
• Offline time
• Unexplained
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Calculating Shrinkage

Example

Paid time off: 8 hrs x 20 days = 160 hours
Paid breaks: 1/2 hr/day x 5 days x 48 weeks = 120 hours
Meetings/training: 3 hrs/week x 48 weeks = 144 hours
Off-phone time: 1/2 hr/day x 5 x 48 weeks = 120 hours
Unexplained: 1/4 hr/day x 5 x 48 weeks = 60 hours

Total 604 hours
(Available 2080 hours)

Shrinkage 29%
Understanding Staff Numbers

The Real Staff Needed

Workload = # Calls x AHT

Shrinkage

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Schedule Inflexibility

The Real Staff Needed

Workload = # Calls x AHT

Inflexibility

Shrinkage

Random call arrival

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Improving Flexibility: Different Perspectives

- Customer
- Senior management
- Call Centre manager
- Agent
- Team supervisor
- Unions/contracts
- HR department
- Scheduling administrator
Think of your shifts like LEGO building blocks. The more sizes and types of blocks, the better you can build your model.
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Schedule Flexibility: Enables Optimised Schedule

The Result:

A better fit with less understaffing and overstaffing
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Pros and Cons of Different Scheduling Strategies

Bad for Flexibility
- Long planning horizon
- Full timers
- Fixed shifts
- Rotations
- Lots of schedule constraints/rules

Good for Flexibility
- Short planning horizon
- Part timers
- Flexible shifts / contracts
- Staggered start times
- Different shift lengths
- Split shifts

Let’s examine some details…
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Scheduling Horizon

How often will you create schedules?

• Short horizon
  • Allows the centre to adjust for varying workload
  • Gets a closer match of workforce to workload
  • Can be disruptive to staff

• Long horizon
  • Provides stability in schedules for staff
  • Requires more last-minute changes
    • Overtime
    • Time off without pay
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Scheduling Constraints

What are your scheduling rules and constraints?
- Must start times be the same for each day of the week?
- Must breaks be at the same time each day of the week?
- Is there a maximum time between breaks?
- Do shifts rotate weekend days?
- Are there defined times for each shift?
- Don’t forget labour laws, e.g. Working Time Directive

Warning
- Each constraint creates another limitation to maximizing efficiency.
- Care is needed to create compliant schedules with spreadsheets.
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Staggered Start Times

Schedule Optimization

- 60 minute start times
- 30 minute start times
- 15 minute start times
Staggered Start Times

Catalog Case Study

<table>
<thead>
<tr>
<th></th>
<th>60-Minute Start Times</th>
<th>30-Minute Start Times</th>
<th>15-Minute Start Times</th>
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<tbody>
<tr>
<td>FTE</td>
<td>132</td>
<td>124</td>
<td>114</td>
</tr>
</tbody>
</table>

Staggering (!) Results:

8% Headcount Savings over Traditional 30-Minute Start Times
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Split Shifts

• Great for covering the M curve
• Convenient for home workers
• Not so attractive to call centre workers?
• Location and facilities can make a difference!
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Incentivising flexibility

• Limit to how many pay rises you can give
• Limit to how much promotion you can give
• Better incentive: Shift bidding
  • Give choices in hours worked
  • Agents bid for pre-optimised shifts
  • Business wins; Customer wins; Agent wins
• Better incentive: Self service for shift swaps
  • Agents can swap shifts with colleagues
  • Empowers agents and improves work/life balance
  • Automation in WFM systems eliminates admin
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Efficient Scheduling Requires WFM Software

But WFM Software…

• Incurs expensive upfront licence fees
• Incurs expensive annual maintenance fees
• Requires servers and a big IT project
• Takes months to go live
• Is complex

Right?
Wrong!

- injixo WFM from InVision
- £9 per user per month, including
  - Powerful WFM on a website
  - Hosting, updates, backups
  - No server or heavy IT involvement
  - Minimum 99.5% uptime guarantee

- Normally Opex not Capex
- Streamlined implementation
- Flex capacity as needed

- ROI is almost instant …
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See for yourself

- Join us for a live web demo
- Every Friday at 11:00 UK time
- 90 minutes
- Contact chris.dealy@injixo.com for joining instructions