Meet the Panellists

Jonty Pearce, Call Centre Helper

Penny Reynolds, Founder - The Call Center School

Dean Couchman, injixo

Chris Dealy, injixo

© The Call Center School, a division of injixo inc.
Session overview

In this session, we’ll discuss five tips for making the most of your call centre workforce:

1. Improve forecast accuracy
2. Looking for staffing efficiencies through consolidation
3. Optimise schedule coverage
4. Maximise agent satisfaction and schedule adherence
5. Automate workforce management tasks
Tip 1: Improve forecast accuracy

Three basic types of forecasting:
1. Point estimation
2. Averaging
3. Time series

Possible approaches
• Pen and paper
• Spreadsheets
• Automated WFM system
Calculating forecast accuracy

Ways to measure accuracy

1. Percent difference
2. Standard deviation
3. Correlation coefficient
Calculating forecast accuracy

Percentage Difference

<table>
<thead>
<tr>
<th></th>
<th>Forecast Volume</th>
<th>Actual Volume</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>3533</td>
<td>3601</td>
<td>-1.9</td>
</tr>
<tr>
<td>Tuesday</td>
<td>2455</td>
<td>2544</td>
<td>-3.6</td>
</tr>
<tr>
<td>Wednesday</td>
<td>2611</td>
<td>2723</td>
<td>-4.3</td>
</tr>
<tr>
<td>Thursday</td>
<td>2990</td>
<td>3111</td>
<td>-4.0</td>
</tr>
<tr>
<td>Friday</td>
<td>2935</td>
<td>3078</td>
<td>-4.9</td>
</tr>
<tr>
<td>Saturday</td>
<td>1028</td>
<td>1103</td>
<td>-7.3</td>
</tr>
<tr>
<td>Total</td>
<td>15,552</td>
<td>16,160</td>
<td>-3.9</td>
</tr>
</tbody>
</table>
# Calculating forecast accuracy

## Percentage Difference

<table>
<thead>
<tr>
<th></th>
<th>Forecast Volume</th>
<th>Actual Volume</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>3533</td>
<td>3494</td>
<td>+ 1.1</td>
</tr>
<tr>
<td>Tuesday</td>
<td>2455</td>
<td>3156</td>
<td>- 28.6</td>
</tr>
<tr>
<td>Wednesday</td>
<td>2611</td>
<td>2854</td>
<td>- 9.3</td>
</tr>
<tr>
<td>Thursday</td>
<td>2990</td>
<td>2647</td>
<td>+ 11.5</td>
</tr>
<tr>
<td>Friday</td>
<td>2935</td>
<td>2301</td>
<td>+ 21.6</td>
</tr>
<tr>
<td>Saturday</td>
<td>1028</td>
<td>993</td>
<td>+ 3.4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>15,552</strong></td>
<td><strong>15,445</strong></td>
<td><strong>+ 0.7</strong></td>
</tr>
</tbody>
</table>
Calculating forecast accuracy

Which is better?

<table>
<thead>
<tr>
<th></th>
<th>% Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>-1.9</td>
<td>+ .011</td>
</tr>
<tr>
<td>Tuesday</td>
<td>-3.6</td>
<td>- .286</td>
</tr>
<tr>
<td>Wednesday</td>
<td>-4.7</td>
<td>- .093</td>
</tr>
<tr>
<td>Thursday</td>
<td>-4.0</td>
<td>+ .115</td>
</tr>
<tr>
<td>Friday</td>
<td>-4.9</td>
<td>+ .216</td>
</tr>
<tr>
<td>Saturday</td>
<td>-7.3</td>
<td>+ .034</td>
</tr>
<tr>
<td>Total</td>
<td>-3.9</td>
<td>+0.7</td>
</tr>
</tbody>
</table>
Statistically speaking…

Standard Deviation is another way to evaluate variation.
## Calculating Standard Deviation

What does a such a wide variation do to your operation?

<table>
<thead>
<tr>
<th></th>
<th>Forecast Volume</th>
<th>Actual Volume</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>3533</td>
<td>3494</td>
<td>1 %</td>
</tr>
<tr>
<td>Tuesday</td>
<td>2455</td>
<td>3156</td>
<td>- 29 %</td>
</tr>
<tr>
<td>Wednesday</td>
<td>2611</td>
<td>2854</td>
<td>- 9 %</td>
</tr>
<tr>
<td>Thursday</td>
<td>2990</td>
<td>2647</td>
<td>+ 11 %</td>
</tr>
<tr>
<td>Friday</td>
<td>2935</td>
<td>2301</td>
<td>+ 22 %</td>
</tr>
<tr>
<td>Saturday</td>
<td>1028</td>
<td>993</td>
<td>+ 3 %</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>15,552</strong></td>
<td><strong>15,445</strong></td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

Standard Dev = 17.53
Inaccurate forecasts

Bad data:
1. Improper adjustment for aberrations
2. Missing data
3. Skewed AHT information

Improper Assumptions:
1. Business drivers that impact calls
2. Business drivers that impact AHT
3. Staffing changes
4. Other business cycles
Tip 2: Look for staffing efficiencies

Best options:
1. Small groups with low occupancy
2. Single skills versus universal skills
Tip 2: Look for staffing efficiencies

Is bigger better?

Make sure you evaluate consolidation trade-offs.

<table>
<thead>
<tr>
<th>Call Volume</th>
<th>Workload hours</th>
<th>Number of Staff</th>
<th>Staff Occupancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>10</td>
<td>14</td>
<td>71 %</td>
</tr>
<tr>
<td>500</td>
<td>50</td>
<td>56</td>
<td>89 %</td>
</tr>
<tr>
<td>1000</td>
<td>100</td>
<td>107</td>
<td>93 %</td>
</tr>
<tr>
<td>2000</td>
<td>200</td>
<td>209</td>
<td>96 %</td>
</tr>
</tbody>
</table>
Traditional routing

Single Skilled Agents

Customer Service Calls

50 Customer Service Agents

Sales Calls

50 Sales Agents

ACD

© The Call Center School, a division of injixo inc.
Universal agents

Cross-trained Agents

Customer Service Calls

Sales Calls

80 Sales/Service Agents

ACD

© The Call Center School, a division of injixo inc.
Best of both worlds?

Specialised Agent Groups

Customer Service Calls

35 Service Agents

35 Sales Agents

Sales Calls

20 Sales/Service

ACD

© The Call Center School, a division of injixo inc.
Another look

- Optimal scheduling of multi-skilled agents is not a trivial task
- A webinar topic all on its own
- WFM software unlocks the full potential
Tip 3: Maximise schedule flexibility

Schedules must balance:

• Need for coverage of volatile workload
• Personal needs and wants of agents
• Cost of various schedule solutions
• Compliance with legislation and contracts
Poll

Which of the following is the MOST difficult to accomplish in your own scheduling process?

1. Covering nights and weekends
2. Accommodating agent schedule preferences
3. Minimising labour costs
4. Complying with contracts
Tips from chat room…
Flexibility is vital for efficiency

- Full-time/part-time options
- Flexible start times
- Mixture of days on/off
- Flexible breaks and lunches

Examples

- Slant schedules (10-9-8-7-6)
- Split shifts/extra long lunches
- Mixture of days on/off
- Creative lunch definitions
What creative methods do you employ to ensure a mix of work schedules that match workforce to workload in a desirable way?

Send in your tips and techniques via Chat.
What matters most?

Audience Quiz:

Which of the following has the highest correlation with customer satisfaction?

- First Call Resolution
- Service Level
- Average Handle Time
- Employee Satisfaction
- Internal Quality Scores
Employee satisfaction surveys

What matters to agents

- Compensation
- Work Schedule
- Work/Life Balance
- Training/Development
- Rewards/Recognition
- Social Atmosphere
- Relationship with Supervisor
- Tools and Resources
Tip 5: Automate Workforce Management Tasks

Cost justification and payback from:

- More accurate forecasts
- More efficient schedule plans
- More consistent delivery of service
- Reduced time and labour to perform WFM tasks
- Better schedule adherence

Latest tools let you:

- Plan for all channels – e.g. email, chat
- Easily produce optimised schedules for multi-skilled workforce
- Give agents self-service via their smartphones
Software Demonstration
Award-winning WFM now costs less than you think!

- injixo: WFM in the cloud for £9/user/month
- Everything you need via a web browser
- **No** server or heavy IT project
- **No** hidden extras
- **No** setup fee – training included
- **No** minimum term – exit anytime
- Minimum 99.5% uptime guaranteed
- Cloud = continuous innovation
- Vault-like security (PCI DSS, etc.)
- Opex not capex
- Flex capacity up and down as needed
See for yourself

- www.injixo.com
- blog.injixo.com
- Live live web demo
  - Every Friday at 11:00 UK time
  - 90 minutes - deep dive
  - Contact chris.dealy@injixo.com for joining instructions