

# Seven Strategies for Schedule Adherence

Getting and Keeping Bodies in Seats



## Meet the Panellists



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Adherence Strategies

## Strategy 1: Define the Adherence Problem

It's just a few minutes a day...



What's the big deal?

## Defining the Problem – What is Affected?

Lack of Adherence = Understaffing

Understaffing affects:

- Speed of answer to customer
- Staff workload and occupancy
- Telephone costs (e.g. 08xx / freephone)

# The Morning View

What if 5% of the staff aren't where they are supposed to be?

Time of Day	Forecast Calls	Forecast AHT	Forecast Staff	Effect Today	Actual Staff	Net Staff	ASA (goal: 20)
6:00	280	320	56	- 5%	53	- 3	55 sec
6:30	310	320	62	- 5%	59	- 3	41 sec
7:00	350	320	69	- 5%	65	- 4	73 sec
7:30	380	320	75	- 5%	71	- 4	54 sec
8:00	420	320	82	- 5%	78	- 4	58 sec
8:30	450	320	88	- 5%	84	- 5	45 sec



## Adherence Strategies

### A Closer Look

Erlangs	Staff	ASA	Extra Tel Time	Extra Tel Cost/Hour	Occupancy
62	69	14	-	-	89%
62	68	21	7	£4.08	91%
62	67	30	16	£9.33	93%
62	66	45	31	£18.08	94%
62	65	73	59	£34.41	95%
62	64	135	119	£69.41	97%
62	63	364	350	£204.16	98%

## Strategy 2: Define the Costs of Poor Adherence

Three Possibilities:

Cost of poor service/ high occupancy/ telephone costs (previous example)

OR

Replacement cost to account for non-adherence

OR

Cost of “lost time”

## Calculation Example

### The Value of Schedule Adherence

- 100 call centre agents
- 10 min/day “lost time”
- £8/hour wage rate



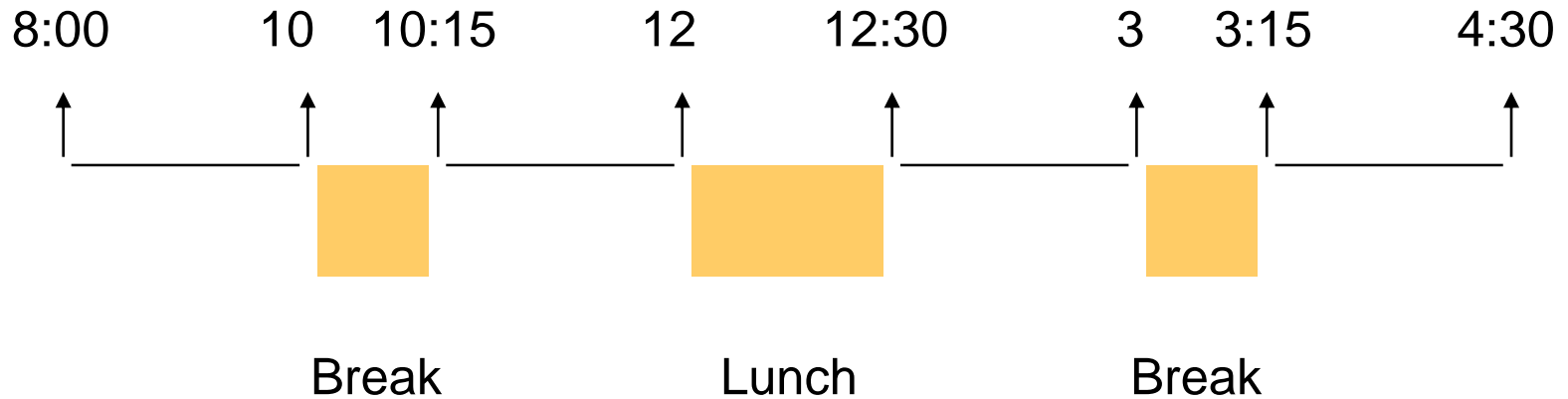
$10 \text{ min} \times 5 \text{ days} \times 52 \text{ weeks} = 2600 \text{ min/yr} = 43.3 \text{ hrs p.a.}$

$43.3 \text{ hrs} \times £8/\text{hr} = £346 \text{ per person} \times 100 \text{ agents} = £34,600 \text{ p.a.}$



## Adherence Strategies

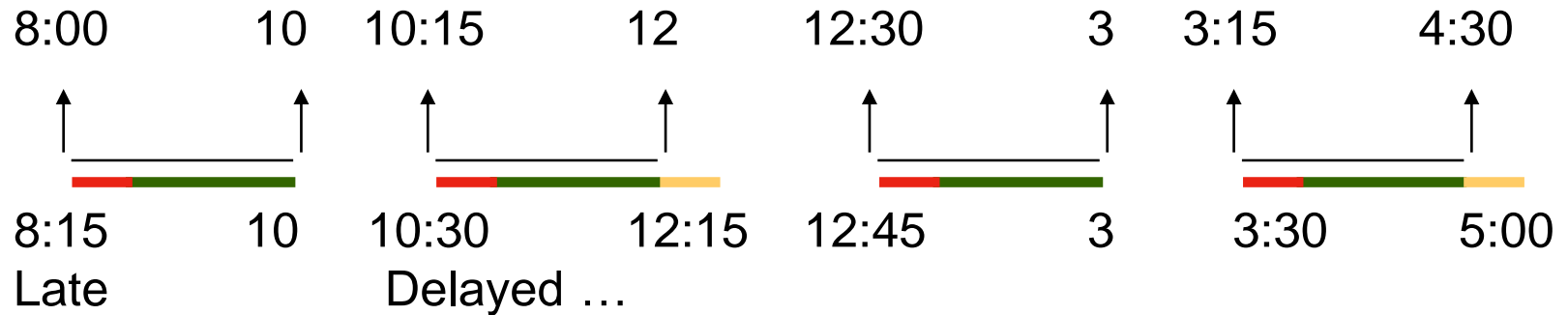
### Strategy 3: Define Adherence Measurements



Total Scheduled Minutes = 450 of Phone Time

## Adherence Strategies

### Actual Log In Time

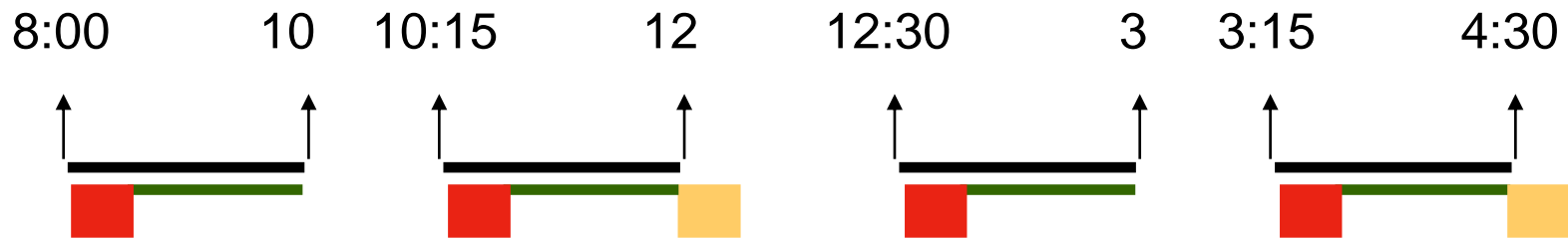


Total Scheduled Time = 450 minutes

Total Phone Time = 435 minutes

## Adherence Strategies

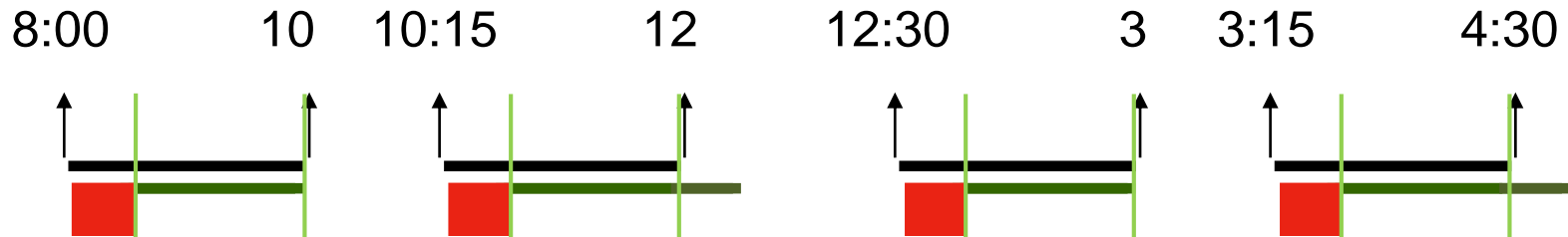
### True Adherence



The places where Black & Green match are compliant minutes.

The Red/Yellow indicate time not compliant with the schedule.

## True Adherence Calculation



Total Scheduled Minutes = 450

Total Sign on Minutes = 435

Total Adherence Minutes = 390

# Example WFM Adherence and Conformance report

Adherence Report: 01/03/2012 - 02/03/2012										
Planning Unit: Sales										
P No.	Employee	Scheduled				Actual				Variance Description
		From	To	Duration	Activity	From	To	Duration	Activity	
100001	Davis, Nick	07:30	10:00	02:30	Hotline	07:36	09:50	02:14	Logged In	Duration < Schedule
		10:00	10:15	00:15	Break	09:50	09:54	00:04	Break	Duration < Schedule
		--:--	--:--	--:--		09:54	10:03	00:09	Logged In	Unscheduled event
		--:--	--:--	--:--		10:03	10:15	00:12	Break	Unscheduled event
		10:15	11:30	01:15	Hotline	10:15	11:35	01:20	Logged In	
		11:30	12:30	01:00	Lunch	11:35	12:42	01:07	Break	Ended 12 min late Duration > Schedule
		12:30	14:30	02:00	E-Mail	12:42	14:24	01:42	Logged In	Duration < Schedule
		14:30	14:45	00:15	Break	14:24	14:50	00:26	Break	
		14:45	16:30	01:45	E-Mail	14:50	17:01	02:11	Logged In	Ended 31 min late Duration > Schedule
				<b>Adherence</b>				<b>Conformance</b>		
	<b>Activity</b>	<b>Scheduled Time</b>	<b>Actual Time</b>	<b>Min. In Adherence</b>	<b>Min. Out Adherence</b>	<b>% in Adhere</b>	<b>+/- Min. Conform.</b>	<b>% in Conform.</b>	<b>% of Total Sched.</b>	<b>% of Total Actual</b>
	Present	07:30	07:46	423	27	94%	16	<b>104%</b>	83%	82%
	Break	01:30	01:39	78	43	87%	9	110%	17%	18%
	<b>Total</b>	<b>09:00</b>	<b>09:25</b>	<b>501</b>	<b>70</b>	<b>93%</b>	<b>25</b>			

# Clarifying Terminology and Defining Expectations

- “Conformance”, “Adherence”, “Compliance” often used interchangeably.
- “Conformance” is total hours worked v. total hours scheduled.
- “Adherence” is total hours worked when scheduled to work v. total hours scheduled.
- Adherence is the more appropriate measure in centres with abandoning contacts, e.g. calls, chats.
- Conformance is the more appropriate measure for non-abandoning contacts, e.g. email, correspondence.
- Minimum acceptable levels are generally in the range of 92 – 98%.

## Strategy 4: Set Reasonable Adherence Goals

<b>Adherence Percentage</b>	<b>“Free” Minutes</b>
92%	33.6 min
93%	29.4 min
94%	25.2 min
95%	21.0 min
96%	16.8 min
97%	12.6 min
98%	8.4 min

Paid Minutes:  
480 minutes

Scheduled On-Phone Time:  
420 minutes

What is a reasonable adherence goal?

## Setting an Adherence Goal

### Considerations:

- Consider the average handle time of calls.
- Analyse the likelihood of a very long call.
- Identify all the barriers that may prevent adherence.
- Involve frontline staff in defining what is reasonable.
- Define minimum expectation (pass/fail).
- Define “grades” of adherence.



# Strategy 5: Diagnose & Address Reasons for Adherence Problems

## Three Basic Reasons

Don't Know



Can't



Won't



## Performance Management Model

### Don't Know (Unaware):

- Expectations unclear
- Unaware of behaviour

### Address by

- 'Power of One' training
- Publishing Adherence Report
- Live notifications



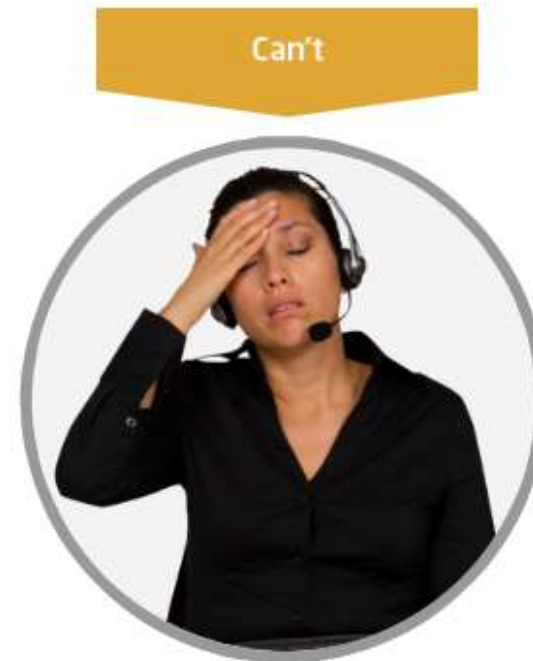
## Performance Management Model

Can't:

- Don't know how
- Barriers/lack of support

Address by

- Coaching, driven by RTA
- Live notifications



## Performance Management Model

Won't:

- Lack of motivation
- Improper consequences
  - Negative for positive behaviour
  - Positive for negative behaviour

Address by

- Considering consequences...



## Consequences

### Characteristics of Consequences

- Positive or negative
- Immediate or future
- Certain or uncertain

The most effective consequences are:

- Positive
- Immediate
- Certain

## Adherence Consequences

Behaviour: Lack of Schedule Adherence

<b>Consequences</b>	<b>P/N</b>	<b>I/F</b>	<b>C/U</b>
10 minutes extra sleep	P	I	C
More time to socialize	P	I	C
Take fewer calls	P	I	C
Attention from supervisor	N	?	?
Peer pressure to adhere	N	?	?
Miss quarterly bonus	N	F	U
Poor appraisal	N	F	U

## Strategy 6: Increase Agent Engagement and Win Buy-in

- Key tool for agent engagement: Personal agent portal
  - On PC screen - good
  - On smartphone / tablet - better!
- Reduce 'don't know'
  - Visibility of shifts
- Reduce 'can't'
  - Pop-up notifications / calendar reminders
- Reduce 'won't'
  - Self-service - shift swaps
  - Self-service - holiday requests
  - Shift bidding

## Strategy 7: Use Supporting Tools

- Key tool: Adherence reporting
- Historical Adherence and Conformance reports
  - Perfect for appraisals
  - Make consequences *certain*
- Real-time adherence monitoring
  - Timely corrective action
  - Make consequences *immediate*




## WFM can cost less than you think

- injixo WFM from InVision
- £9 per user per month, including
  - Support & maintenance
  - Hosting, updates, backups
  - No server or heavy IT involvement
  - Min 99.5% uptime guarantee
- Normally Opex not Capex
  - Streamlined implementation
  - Flex capacity as needed



## Adherence Strategies

# See for yourself

- Join us for a live web demo
- Every Friday at 11:00 UK time
- 90 minutes - deep dive
- Contact [chris.dealy@injixo.com](mailto:chris.dealy@injixo.com) for joining instructions
- **NEW** - injixo ME on 



Adherence Strategies

Thank You!

Thank you for your participation today.