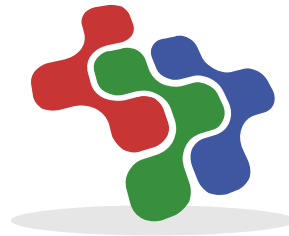


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Call Centre Helper conference  
2<sup>nd</sup> April 2019

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CCplanning

**‘Making Resource Planning real’**





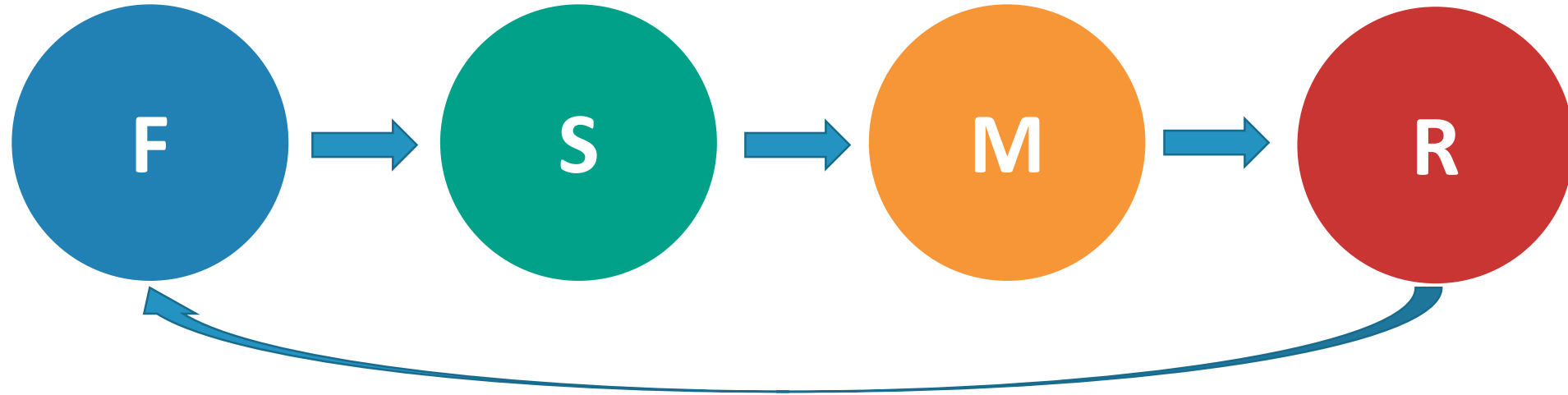
## Top Tip



**BACK** TO THE  
**BASICS**  
AND FORWARD TO THE  
**FUTURE**

# Principles of WFM

These have never changed



## **FORECAST**

*Predict what is going to happen*

## **SCHEDULE**

*Make a plan to deal with our expectations*

## **MONITOR**

*Watch what is happening and adapt delivery approach*

## **REVIEW**

*Did our plan work? Learn lessons and replay*



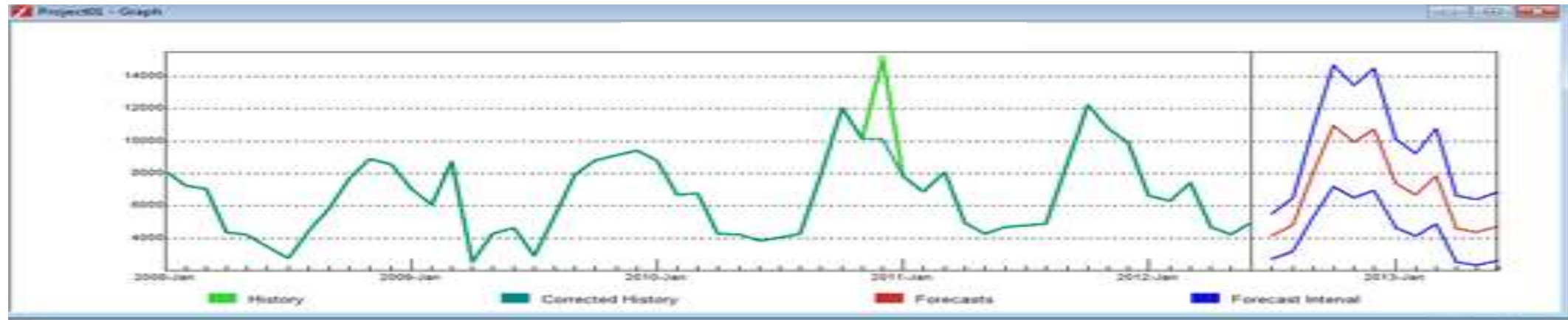
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**So why does Resource Planning fail?**

# Unrealistic forecasts

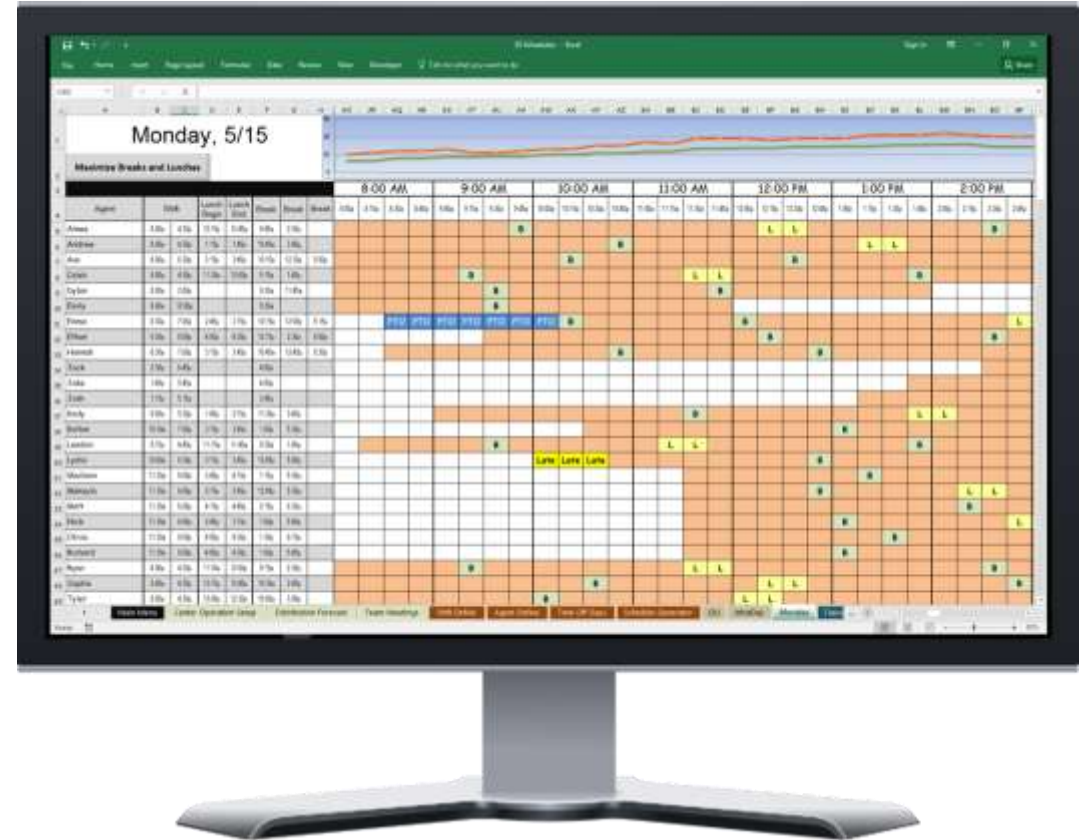
Do we understand the macro environment in which we work?



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# Unrealistic schedules

Do we understand the true needs of our staff?  
Does it match the needs of our customers?



# Unneeded Reaction

Do we know when to hold our nerve on the day?



LoggedIn Agents				
Name	Current State	Current State Time	Answered Calls	Answered Call Rate
Lea Crocker	Ready	10:36	42	25%
Logan Olsen	Talking	25:11	12	15%
Jacque Stapleton	Not Ready	2:09	2	5%
Livia Cabana	Talking	1:36	1	1%
Carlee Alley	Working	11:31	54	59%
Edgar Mckenny	Ready	3:33	57	96%
Mark Gitlin	Ready	16:09	109	97%

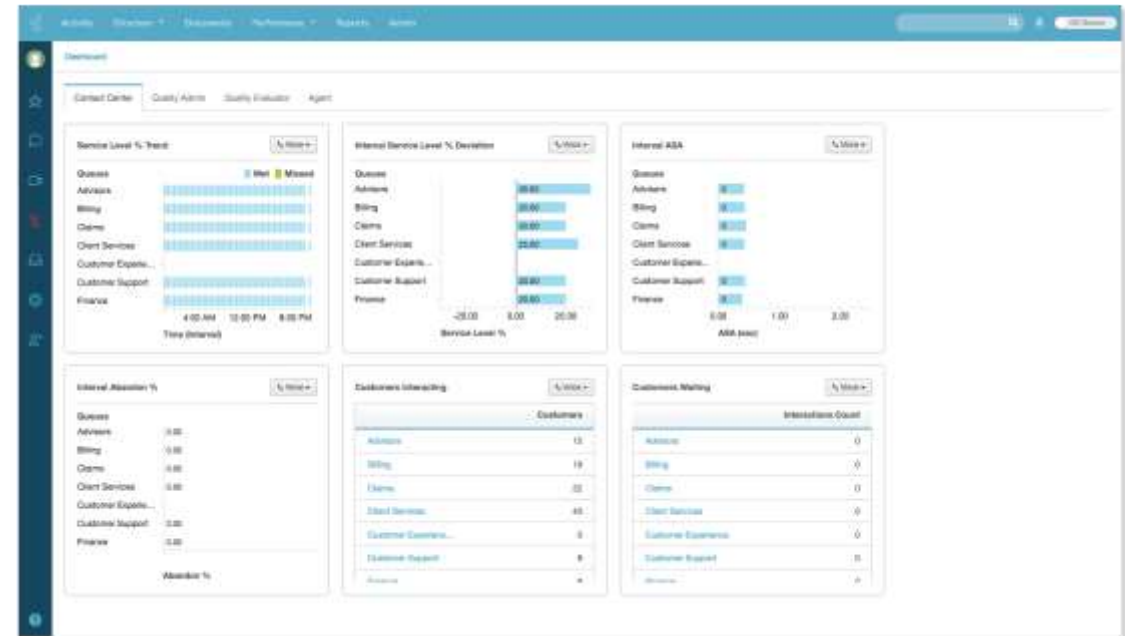




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# Proper Review

Are we allowed to analysis what happened without bias?



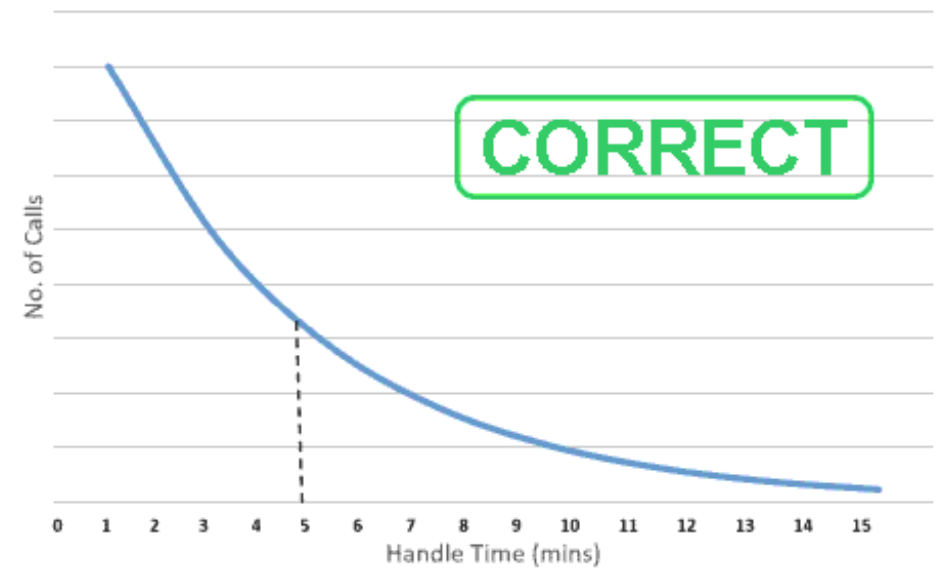
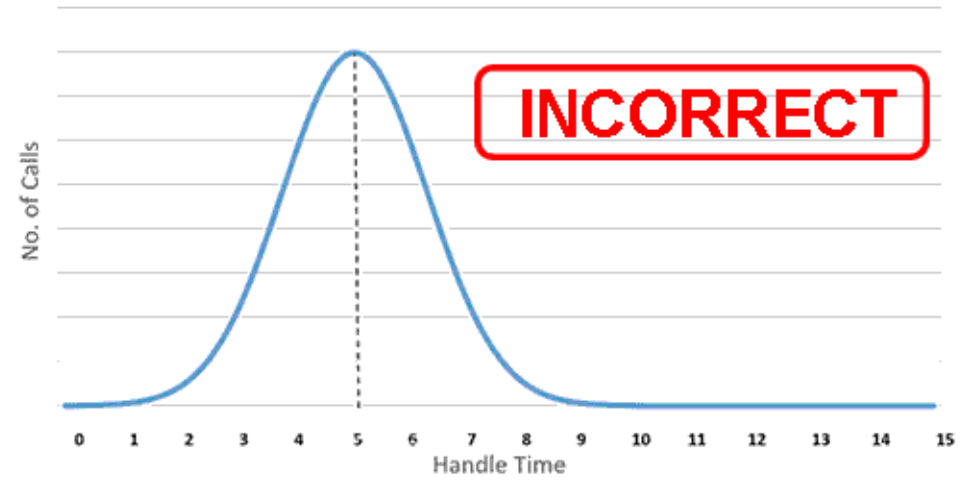
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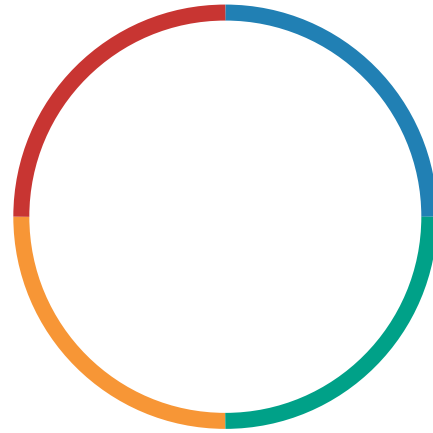
**We are missing something!**

# Averages

Averages are the planner's worst enemy



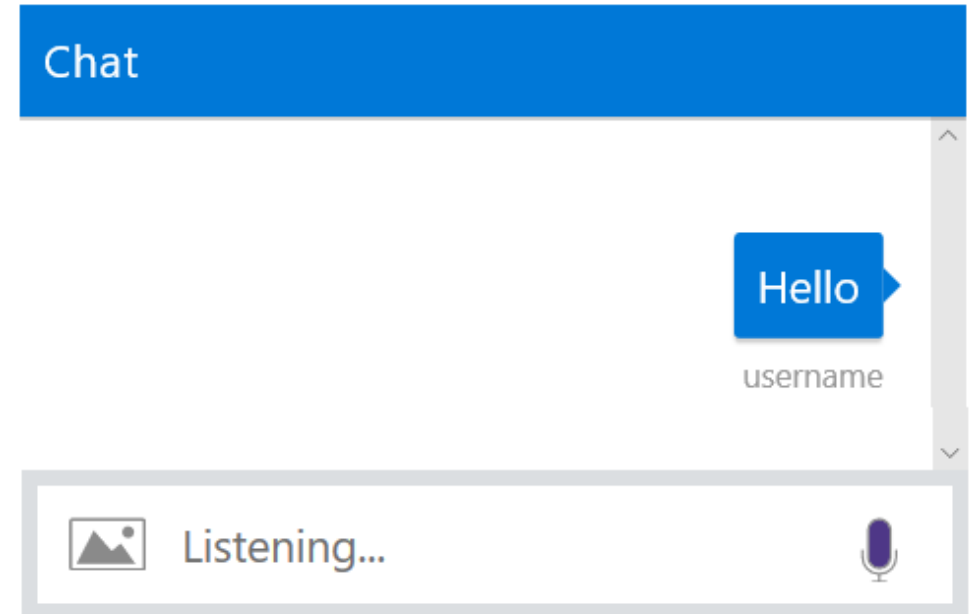
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# Planning for Chat

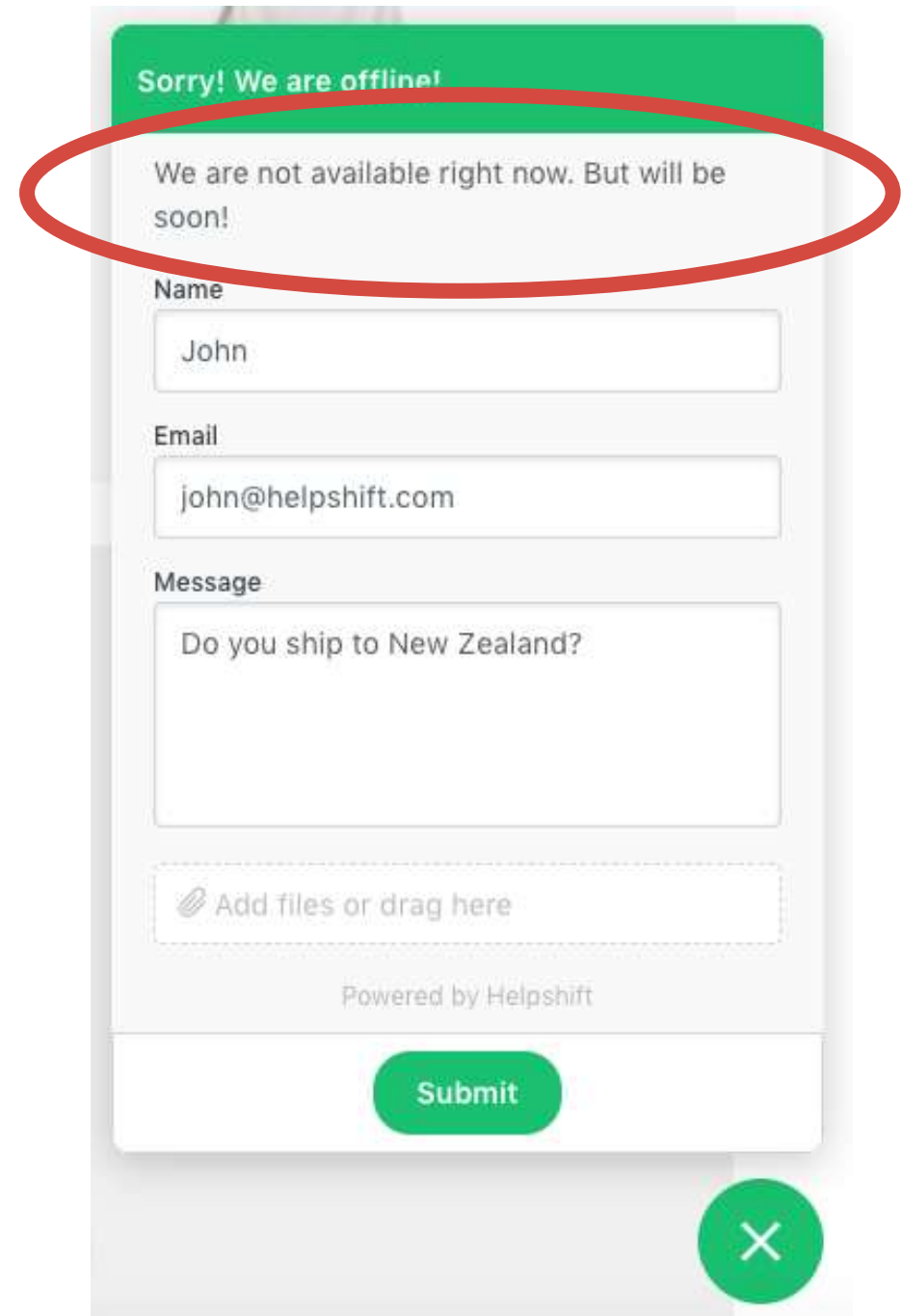
# Misconceptions

*Divide expected volume by concurrency*  
*Use a flat AHT across day*  
*We can just use an Erlang calculator*



# Fact 1

You cannot forecast for Webchat until you go 'all in' and have it switched on without restraints



## Fact 2

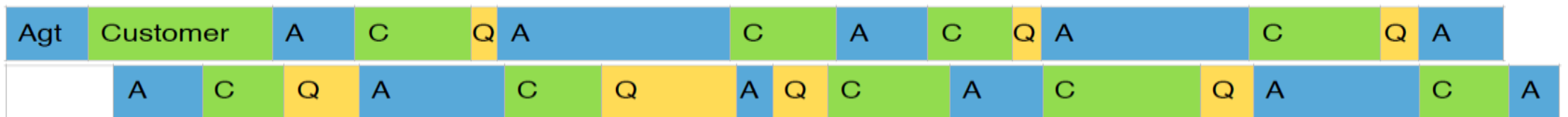
Staff will have a different AHT depending on number of concurrent interactions



With one chat the conversation is loosely split 50/50 between Agent and Customer talking (conceptually)

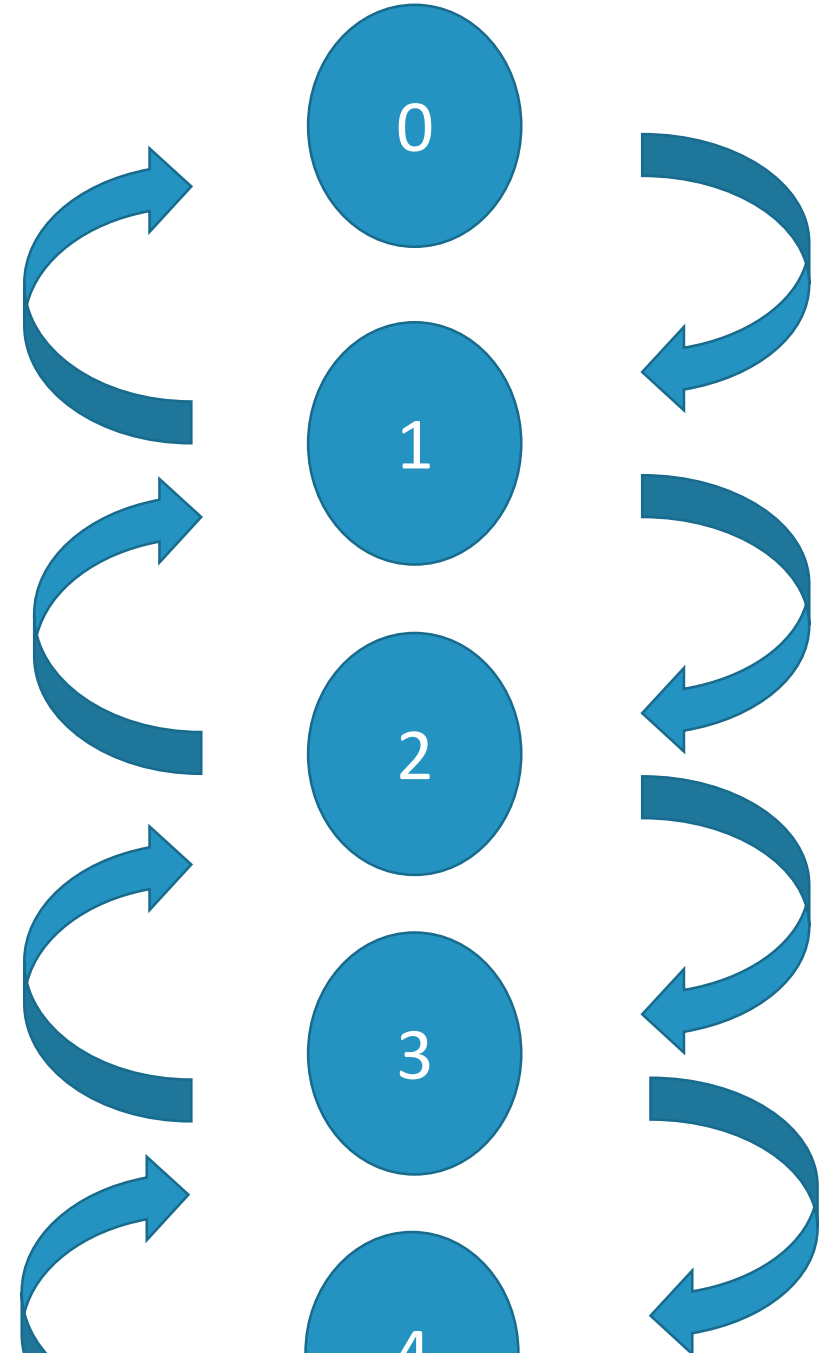
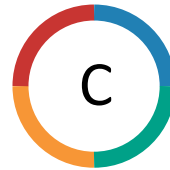


But with 2 chats



### Fact 3

Webchat planning is heavily effected by 'birth – death syndrome (Markov)





## Fact 4

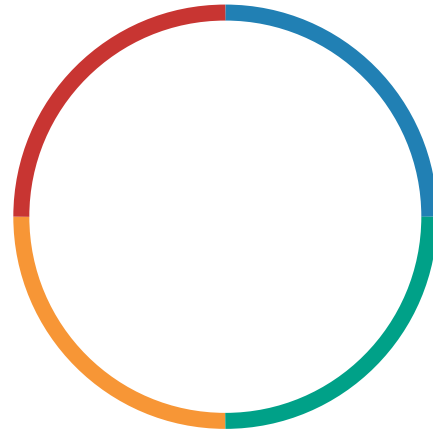
Tolerance has a different impact  
Understand Kaplan-Meier survival  
analysis



$$\begin{aligned}\text{Var}(\widehat{S}(t)) &\sim \widehat{S}(t)^2 \sum_{i: t_i \leq t} \left( \frac{\partial \log(1 - \widehat{h}_i)}{\partial \widehat{h}_i} \right)^2 \text{Var}(\widehat{h}_i) \\ &= \widehat{S}(t)^2 \sum_{i: t_i \leq t} \left( \frac{1}{1 - \widehat{h}_i} \right)^2 \frac{\widehat{h}_i(1 - \widehat{h}_i)}{n_i} \\ &= \widehat{S}(t)^2 \sum_{i: t_i \leq t} \frac{\widehat{h}_i}{n_i(1 - \widehat{h}_i)} \\ &= \widehat{S}(t)^2 \sum_{i: t_i \leq t} \frac{d_i}{n_i(n_i - d_i)}\end{aligned}$$



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# Planning for Omnichannel

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# Omnichannel needs a new way of thinking

B2B and B2C is dying  
C2B must be considered  
(Bill Price)



(Instapage, Sept 2018)

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# Don't assume it brings staffing efficiencies

New channels often leads to new queries  
Ease of access for customers builds customer experience and loyalty – at a cost



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