WFM secrets
Call Centre Helper Webinar

Destructive DIGITAL

What are the **secrets** to successful WFM?

DESIGN

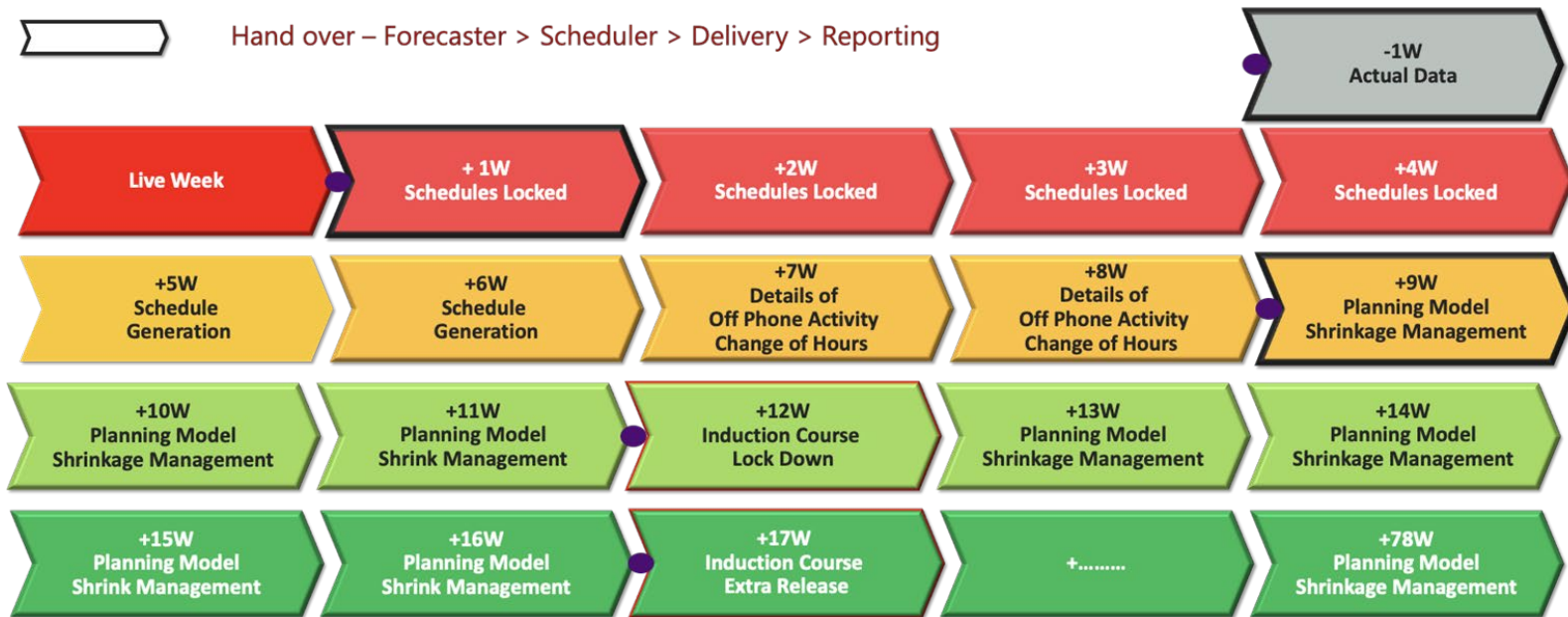AGREEMENTS

ROLES

GOVERNANCE

Design a planning heartbeat - High level example

●   Planning Meeting – Milestones over and fixed planning meeting agenda items

+   All weeks alarmed to highlight any variance from plan

⊃   Hand over – Forecaster > Scheduler > Delivery > Reporting

				-1W Actual Data
Live Week	+ 1W Schedules Locked	+2W Schedules Locked	+3W Schedules Locked	+4W Schedules Locked
+5W Schedule Generation	+6W Schedule Generation	+7W Details of Off Phone Activity Change of Hours	+8W Details of Off Phone Activity Change of Hours	+9W Planning Model Shrinkage Management
+10W Planning Model Shrinkage Management	+11W Planning Model Shrink Management	+12W Induction Course Lock Down	+13W Planning Model Shrinkage Management	+14W Planning Model Shrinkage Management
+15W Planning Model Shrink Management	+16W Planning Model Shrink Management	+17W Induction Course Extra Release	+..........	+78W Planning Model Shrinkage Management

Agree notice period & rules for ALL activities - High level example

Activity	Notice Period
Published Schedules	As agreed with Agents the following 4 weeks is published, notice period required to change **at least 6 weeks**
Vacation & Time Off	Limits set and agreed in budgeting process and further edited in the planning governance process- Notice period can ranges from **0 to 78 Weeks**
Vacation Rule Exception	**No Notice Required** – Only authorized by the appropriate Operations Manager
Meeting	Limits set and agreed in budgeting process and further edited in the planning governance process. Notice period required is **at least 8 weeks**
Third Party Visits	Limits set and agreed in budgeting process and further edited in the planning governance process. Notice period required is **at least 8 weeks**
Training	Limits set and agreed in budgeting process and further edited in the planning governance process. Notice period required is **at least 8 weeks**
Change In Circumstances	Notice period required is **at least 8 weeks**
Day Event	Limits set and agreed in budgeting process and further edited in the planning governance process. Notice period required is **at least 8 weeks**
Special Day	**At least 78 Weeks** (setting holiday limits)
Schedule Preferences	**At least 8 weeks**
New Agents	**Volume** set and agreed in budgeting process and further edited in the planning governance process **at least 6 weeks notice**

Roles are best defined using a special RACI

Responsible "Doer"	*The functional role that performs an activity – responsible for action or implementation* *"Rs" can be shared*
Accountable "Final decision maker"	*The functional role that is ultimately accountable, including yes / no and power of veto* *Only one "A" can be assigned to an activity / decision*
Consulted "In the loop"	*The functional role(s) to be consulted prior to a final decision or action is taken* *"Cs" need two-way communication*
Informed "FYI"	*The functional role(s) which need(s) to be informed after a decision or action is taken* *"Is" need one-way communication*

A WFM RACI includes the time dimension - High level example

	LIVE WEEK — Week 0									Published Schedules — 1-4 Weeks									Schedule Generation — 4-10 Weeks									Forecasting Cap Plan — 10 to 72 Weeks									Budget Process New Business — Yearly Budget								
	Real Time	Scheduler	Forecaster	DH/Ops	Team Leader	Trainer	HR	BNOM	Co/W	Real Time	Scheduler	Forecaster	DH/Ops	Team Leader	Trainer	HR	BNOM	Co/W	Real Time	Scheduler	Forecaster	DH/Ops	Team Leader	Trainer	HR	BNOM	Co/W	Real Time	Scheduler	Forecaster	DH/Ops	Team Leader	Trainer	HR	BNOM	Co/W	Real Time	Scheduler	Forecaster	DH/Ops	Team Leader	Trainer	HR	BNOM	Co/W
Vacation & Time Off	A	C	C	I	I		I		R		A	C	I	I		I		R		A	C	I	I		I		R		R	A	I	I		I	C	R		C	R	R			R	R	A
Vacation Rule Exception	R	C	I	A	C		I		R		C		A	I		I		R		C		A	I				R		R	R	A	I		I	C	R									
Meetings	A	C	C	I	I				I		A	C	I	I				I		A	C	I	I						I	A	I	I		I		C		C	R	R			R	R	A
Third Party Visits	A	C	C	R	I		I		I		A	C	R	I		I		I		A	C	R	I						I	A	R	I		I	C			C	R	R			R	R	A
Training	A	C	C	I	I	R	I		I		A	C	I	I	R	I		I		A	C	I	I	R					I	A	I	I	R	I	C			C	R	R			R	R	A
Co-Worker Council	A	C	C	I	I		I		I		A	C	I	I		I		I		A	C	I	I		I				I	A	I	I		I	C			C	R	R			R	R	A
Change In Circumstances	I	A	C	I	I		R		R		A	C	I	I		R		R		A	C	I	I		R		R		A	C	I	I		R	C	R									
Day Event	A	C	C	I	I		I		I		A	C	I	I		I		I		A	C	I	I						R	A	C	I		I	C			C	R	R			R	R	A
Special Day	A	C	C	C	I		I		I		A	C	C	I		I		I		A	C	C	I						R	A	C	I		I	C			C	R	R			R	R	A
Schedule Preferences	I	A	I	I	I		I				A	C	I	I		I		R		A	C	I	I				R		R	A	I	I		I	C										
New Co-Ws	R	I	C	I	I	A	I		I		R	I	I	I	R	A				I	I	I	I		A				I	R	C	I		A				C	R	R			R	R	A

Planning governance - High level example

Attendees
TBC
TBC
TBC
TBC
TBC

KPIs
Productive Hours
£ Cost To Serve
Shrinkage Holiday, Sickness, Training, Coaching & Meetings etc.
Contact Volumes Drivers

	Definition	Source
Forecasted	The agreed value from the budget or the on-going forecasting process	Forecasting Model
Scheduled	Total time for that activity as stated in the published schedules	TBC
Planned	Total time scheduled but not published (e.g. vacation)	TBC
Actual	The actual total time spent in the activity	TBC

Weekly Planning Meeting

Agenda:
- ❑ Week -1 Analysis *Review Performance"
- ❑ Week +1 Schedulers hand over to Real Time
- ❑ Week +8 Forecasters hand over to Schedulers
- ❑ Discuss any alarms in weeks 0 to 203
- ❑ Recruitment update
- ➤ HR: Offers, Accepts and Induction lock down
- ➤ Schedulers: Required Scheduling/Shifts
- ❑ Record all decisions

Weekly Reporting

1 Hours Balance Sheet - Forecasting Model Report (all weeks)

- ❑ Forecasted
- ❑ Planned
- ❑ Scheduled
- ❑ Actual
- ❑ Shrinkage

2 Interval Coverage Profiles Report (weeks -1 to +6)

- ❑ Resource Forecasted v Schedule per 15min for each activity
- ❑ Graphs and Hours

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Call Centre Helper
W e b i n a r

4th March 2021