

# 7 Expert Tips for an Engaging Scheduling process

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# Call Centre Perception in the noughties

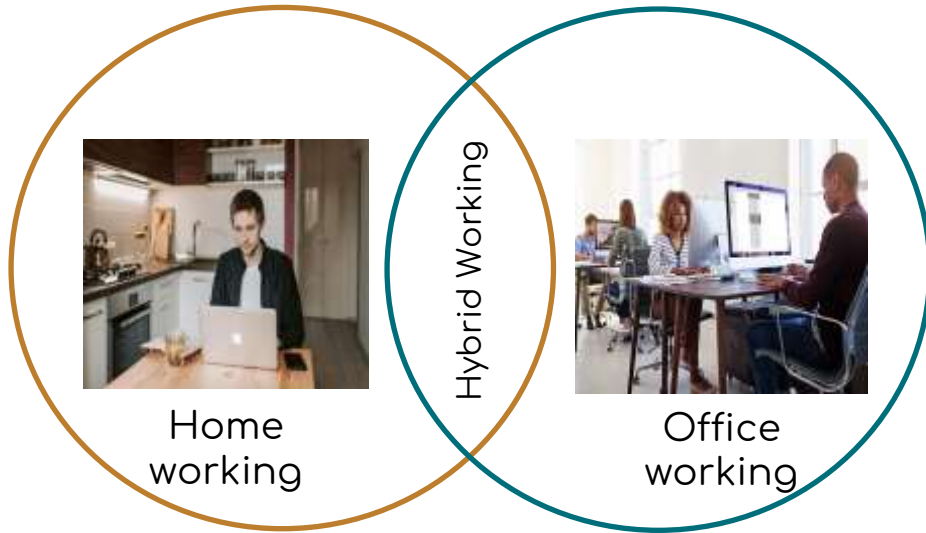


# Tip 1 – Listen to what your advisors are saying!



- What are the advisors saying about the shift process?
- What are their grumbles about their shifts?
- Historically and very much so still Planning are seen as the villains the “computer says no” guys
- How have you changed this perception?
- How do you engage with the advisors?
  
- Start running planning forums on a regular basis?
- Find out first hand what their scheduling issues are
- Take this information to guide you on how to build your shifts
- Engage with your advisors and find out what they want and what would help them with gaining a better work life balance
- Show them the demand profile and the challenge of planning

# Tip 2 – Champion Home working/Hybrid working



- Personally I've been championing home working for a long time
- Businesses have been reluctant to put this in place
- Pandemic has proved that this is a feasible option
- For businesses and advisors this is a win win!!
- For the business a reduction in wasted time with better alignment of shifts to profile
- For advisors, flexibility to work from home, cutting commuting time allowing work to fit with life

# Tip 3 Challenge your scheduling beliefs



- Rotational shift patterns are not the only solution It's the easy option
- Lets be honest scheduling rotations is safe... and to be honest boring!
- Who can honestly say as a scheduler that running rotations and tweaking shifts because the rotation is wonky due to attrition, is interesting
- Some advisors will want to stay on rotations and that's fine but as planners we should also be creative about our solutions
- Wouldn't being able to delight the advisors with shifts they really want be more satisfying??

# Tip 4 – Build a scheduling “Toolkit” to fit the new way of working



- Hybrid working with split shifts working part in the office and evenings in the evening
- Full time home working incentives with short notice changes
- In office engagement days for home workers
- Fully flexible weeks
- Flexible burst shifts for home workers
- Flexibility incentives
- Minimum hour contracts



# Tip 5 – Utilise your WFM to the MAX



- Audit what you don't use and what could really help to engage your advisors
- Buy some training days
- Research other WFM's
  
- Shift preferences
- Shift bidding
- Enabled App
- Overtime preferences
- Sickness notifications



# Tip 6 – Empower Ops in the Planning Process



- If you don't already, allow your ops managers to be part of the planning process
- Open up their access so they can organise they're diaries for coaching and 121's
- Let them input unplanned absence
- Allow advisors to inform of absence in the system if your WFM allows
- Advisors self scheduling of lunches



# Tip 7 – Keep an Eye on your metrics



- Keep an eye on your metrics
- When changing your scheduling process and introducing new ways of working
- Check the impact on your metrics
- Absence
- Lateness
- AWOLS
- Attrition - advisors become more transient as things open up.
- Don't lose them due to poor planning