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Tips for Optimising Workforce Management

Feb 2024
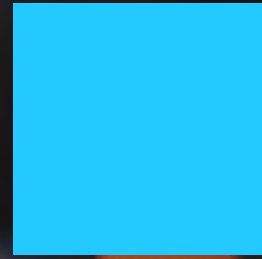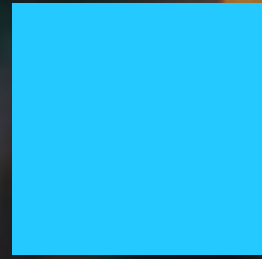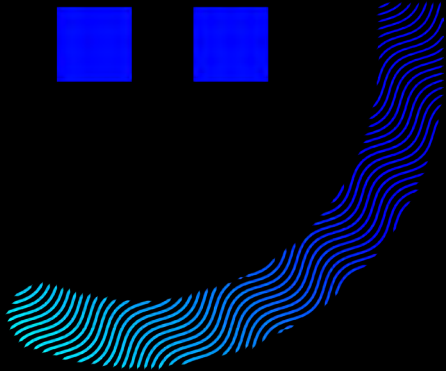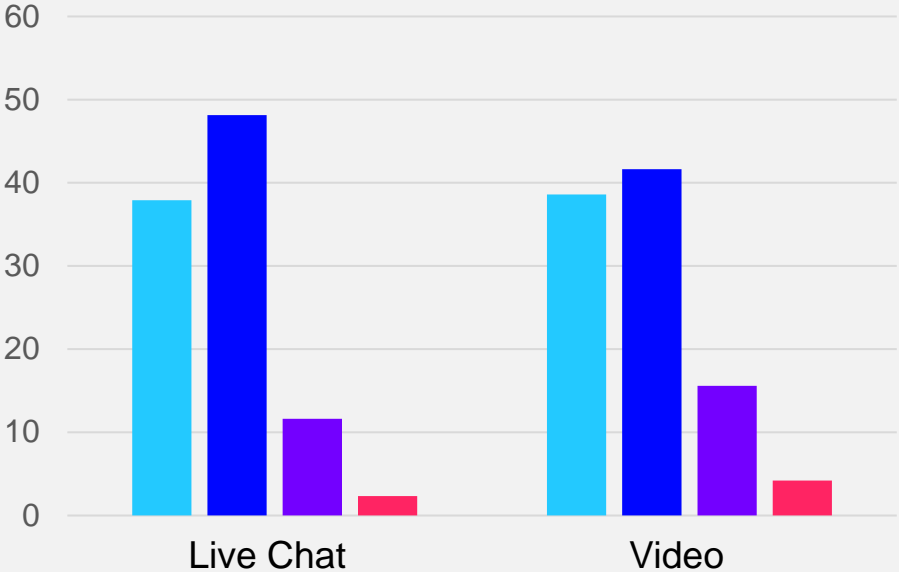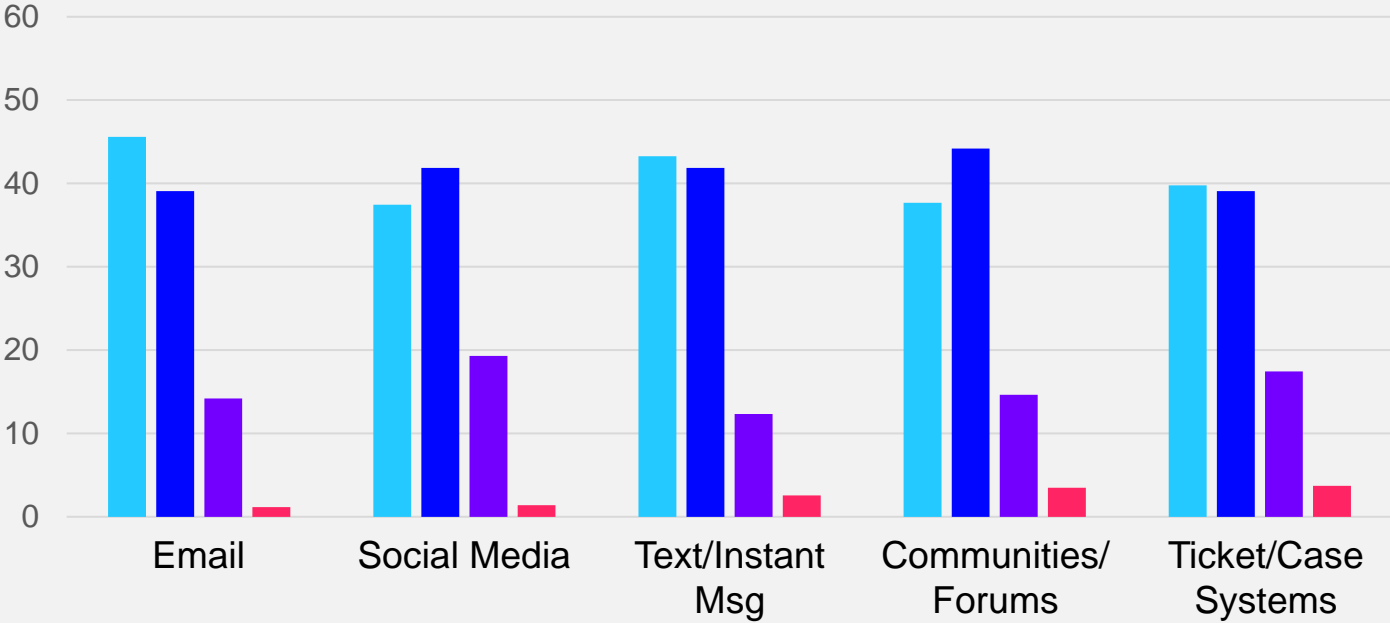
Current Typical WFM Paradigms Resist Blending Work

- Forecasts are based on when a work item* is completed (aka WCE)…not based on when the work was performed

- Work items are assumed to be synchronous

- AHT is shorter than the planning interval

- A work item is processed by a single employee

- Employee works no more than 1 work item concurrently

- A work item resides in a single channel
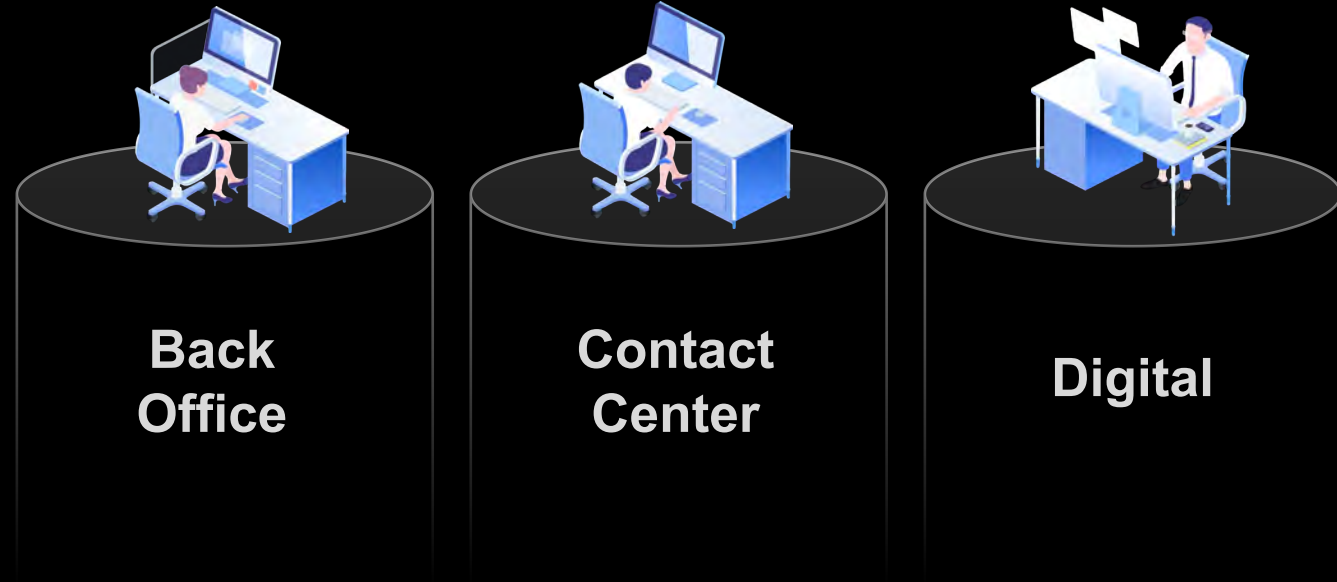
Call, contact, chat, social post, message thread, case, ticket, etc.

Back Office

Contact Center

Digital

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How have todays contact centers changed

- No longer just immediate response contacts.

  (far more than just voice)

- Short handling time contacts have become less frequent with self service technology

  (leaving longer handling times often crossing reporting periods)

- WFM teams have moved to lower granularity

  (often planning to 15-minute intervals)

- More customer contact channels and growing with customer expectations varying by channel

  (responses for some channels are acceptable to be hours or days)

- Agents expected to be handling more than one contact at a time

  (typically, 3 chats per agent but consider emails or complex support tickets)

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Challenges With Long Interactions
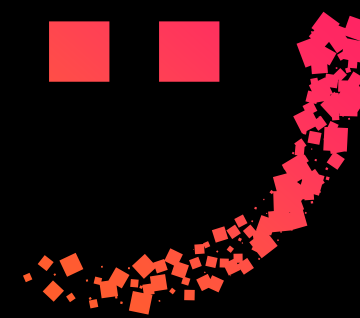
"When Contact Ended" (WCE)

- A contact is counted once in the interval in which it ends…even if the contact spanned intervals
- Handle Time is reported only in the interval in which contact ends

Contact Arrives at 9:10 & Completes at 9:40

Interval	Received	Handled	Handle Time	Staff Req*
9:00	1	0	0	0
9:15	0	0	0	0
9:30	0	1	30	2 people

*Workload = (1 contact x 30mins) / 15mins in interval = 2 people

9:45 interval 9:00 interval

9:30 interval 9:15 interval

Use when…
- most contacts arrive and complete in the same interval
- intervals are longer than the handle times

Creates staffing problems when…
- handle times are long or intermittent and contacts span intervals
- intervals are shorter than the handle times

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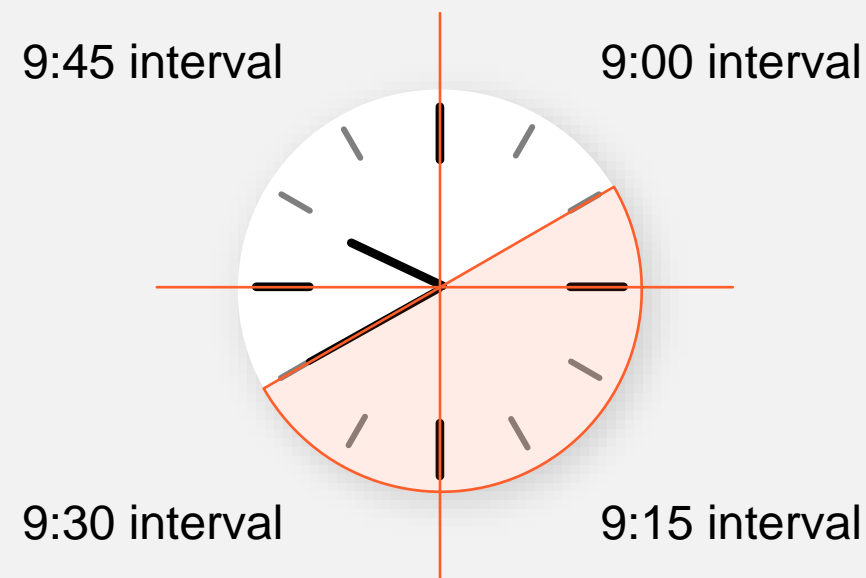
Challenges With Long Interactions
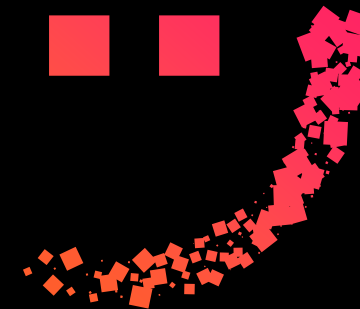
New "Answered & Active True to Interval" (TTI)

- A contact is counted once in the interval in which it is initially answered
  If the contact spans intervals, it is counted again in each subsequent interval where activity occurred
- Handle Time is reported in each interval in which work activity occurs

Contact Arrives at 9:10 & Completes at 9:40

Interval	Received	Answered	Active	Handle Time	Staff Req*
9:00	1	1	0	5	**.33**
9:15	0	0	1	15	**1**
9:30	0	0	1	10	**.67**

*Workload = (contacts x handle time) / 15mins in interval = Staff Req
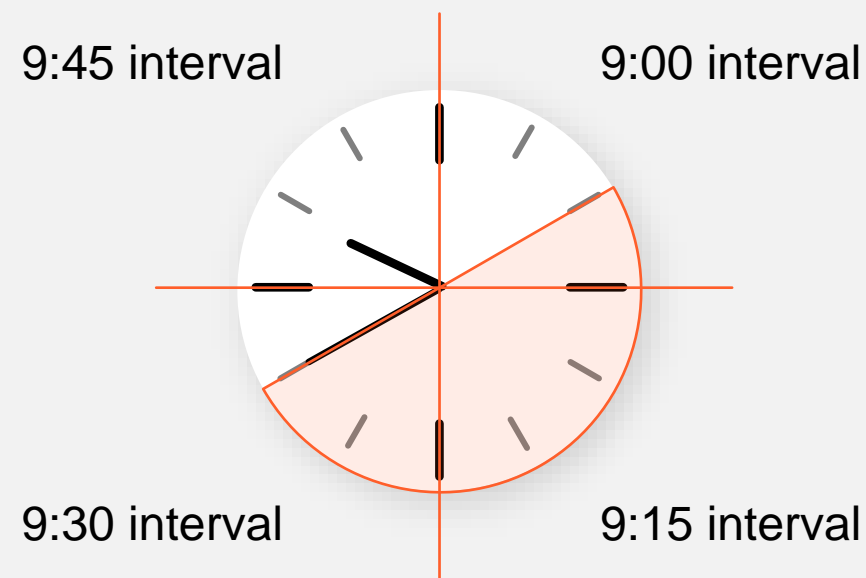
9:45 interval   9:00 interval

9:30 interval   9:15 interval

Use when…
- most contacts arrive and complete in the same interval
- intervals are longer than the handle times

Solves staffing problems when…
- handle times are long or intermittent and contacts span intervals
- intervals are shorter than the handle times

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Activity-based Staff Requirement
*prediction of **work effort** required in each interval*
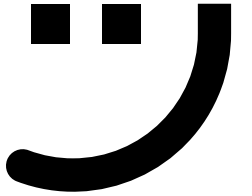
Many interactions ending

WCE under-forecasts

WCE over-forecasts

WCE is erratic

—— WCE Paradigm —— Active TTI Paradigm

9
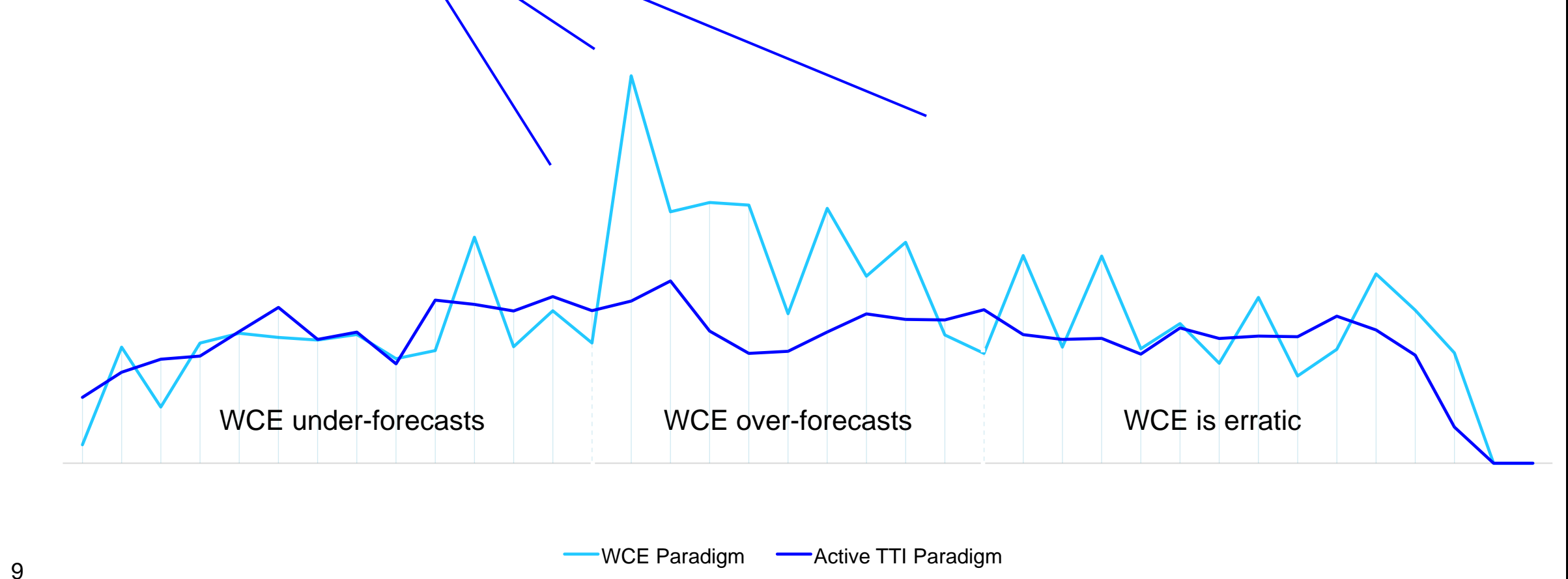
OKR v KPI

OKR is a strategic framework, whereas KPIs are measurements that exist within a framework

- OKR is the acronym for objective and key results

- Link them to corporate strategy

- Make them ambitious

- Make them time specific

Corporate Strategy

Become the world's number-one destination for fashion-loving 20-somethings.

OKR

Raise Brand awareness

Deliver value for money

KPI

Increase CSAT scores by 20%

Increase social media followers by 50%

Reduce customer returns by 15%

Spurious Correlations

Number of people who drowned by falling into a pool

correlates with

Films Nicolas Cage appeared in

Correlation: 66.6% (r=0.666004)
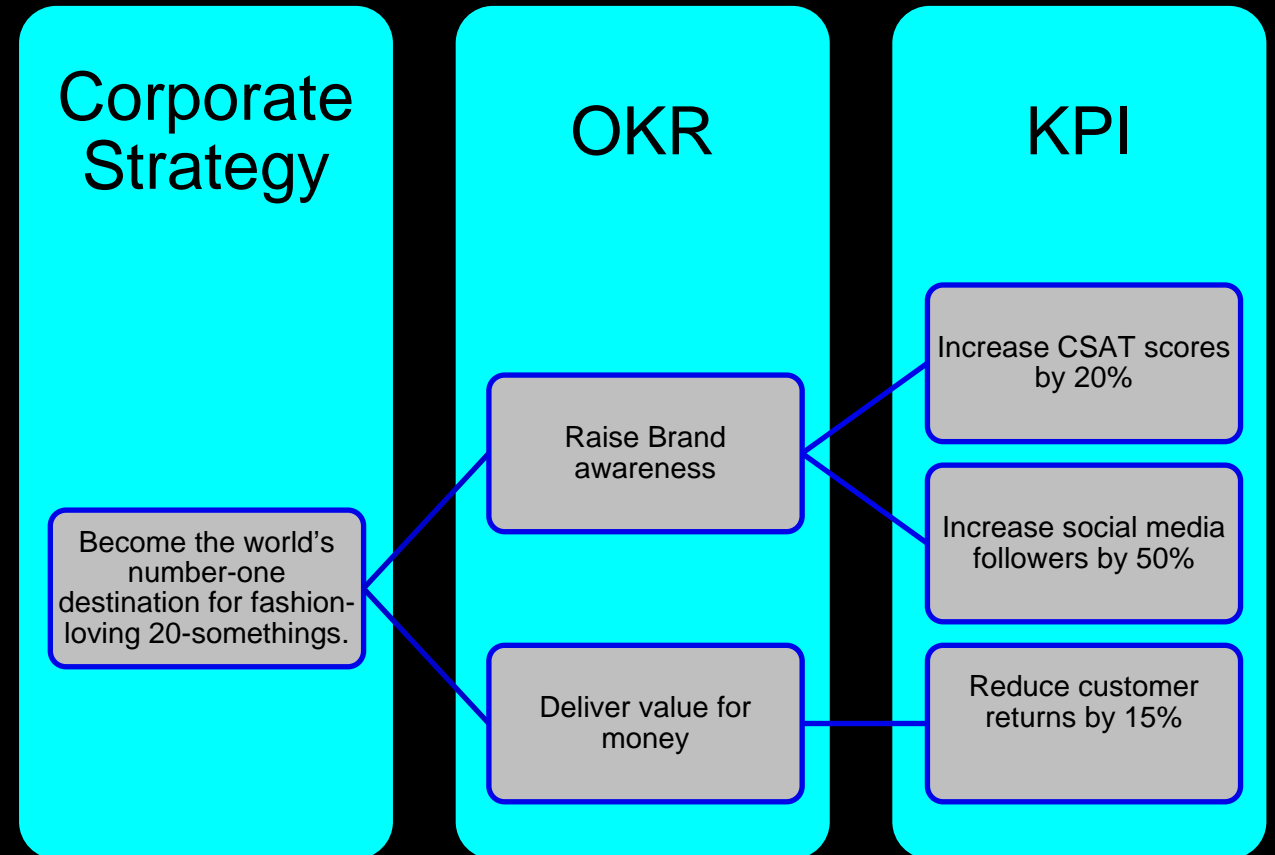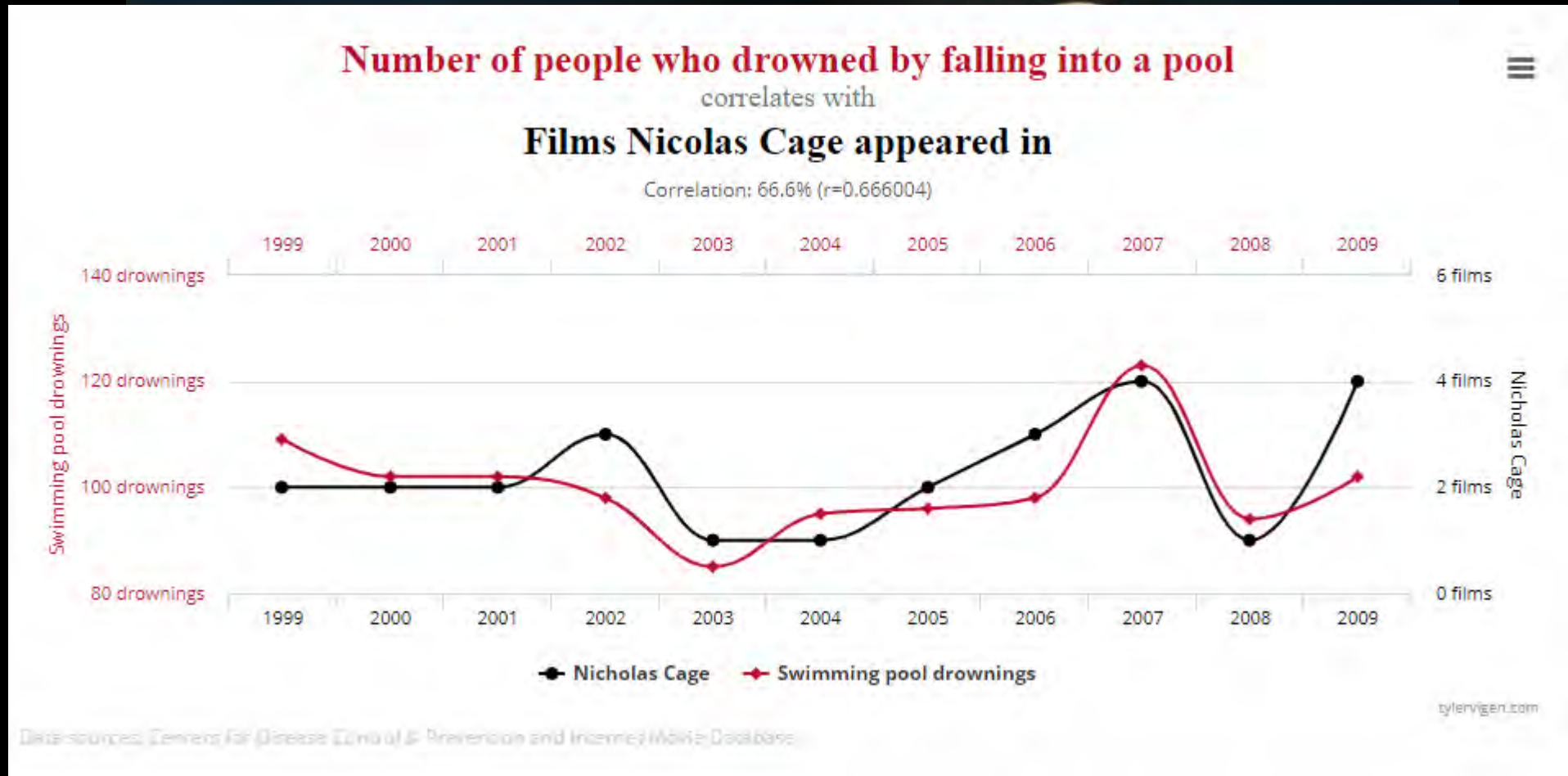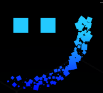
Contact Center Metrics Guide (1 of 2)

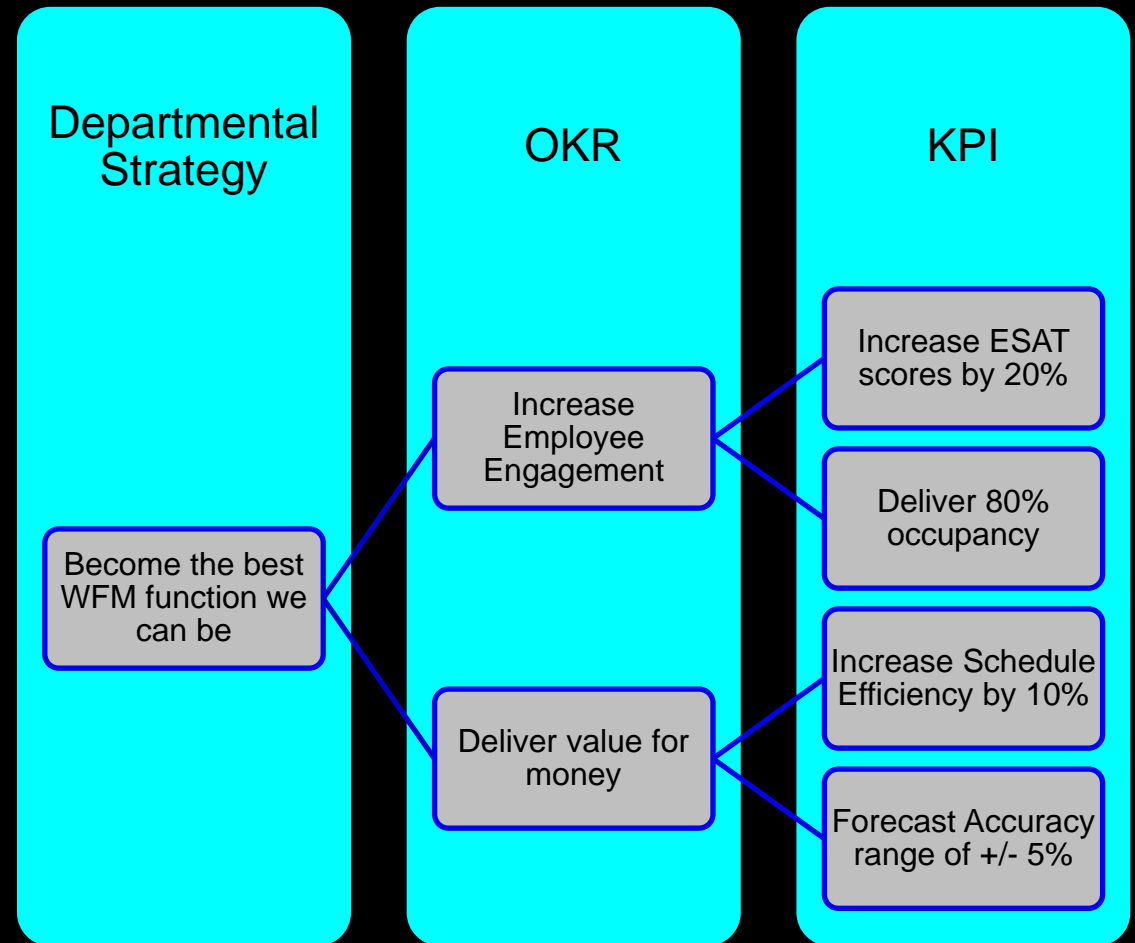| Key Performance Indicator (KPI) *(By improving this KPI, then what other KPIs are affected downstream?)*	What is "Good"?	Cost $aved or $pent	Cust Exp	Abandon Rate	Auth Rate	ASA	Calls Abdn	Calls Handled	Calls Offered	Containment	Handle Rate	Service Lvl (SL)	ACW	AHT	Conferences	Consults	Hold Time	Non-Talk Time	Sentiment	Talk Time	Total Hand Time	Transfers	CES	CSAT/OSAT	FCR	IR	NPS	Repeat Calls	Svy Take-Rate	Svy Volume	Forecast Accy	Attrition	Occupancy	Sched Adhere	Quality Score
1. Calls Flowing to Agent																																				
Abandon Rate — CALC: (Calls Offered - Calls Handled) / Calls Offered	▼	$$	☺	■		▼	▼	▲	▼		▲	▲																							
Authentication Rate — % of calls where customer authenticated in IVR	▲	$	☺		■				▼	▲				▼							▼		▲												
Average Speed to Answer (ASA) — # of seconds customer waits for agent to answer call	▼	$$	☺	▼		■	▼	▲	▲		▲	▲																							
Calls Abandonded — Disconnected calls; CALC: Calls Offered - Calls Handled	▼	$$	☺	▼		▼	■	▲	▼		▲	▲																							
Calls Handled — All calls answered by agent	▲	$$	☺	▼		▼	▼	■			▲	▲									▲(r)								▲	▲					▲
Calls Offered — All incoming calls before they're handled by agent	▼	$$$	☺☺						■					▲(r)							▼		▼	▼	▼	▼	▼			▼					
Containment Rate — % of calls that completed in IVR (didn't fall out to agent)	▲	$$$	☺☺						▼	■				▲(r)							▼		▼	▼	▼(r)	▼	▼			▼					
Handle Rate — CALC: Calls Handled / Calls Offered	▲	$$	☺	▼		▼	▼	▲			■	▲									▲(r)								▲	▲			▲		
Service Level (SL) — % of calls answered in X seconds (target defined by client)	▲	$$	☺	▼		▼	▼	▲	▲		▲	■																							
2. Call Handled by Agent																																				
After-Call Work (ACW) — # of sec agent worked on call after cust disconnected	▼	$	n/a										■	▼							▼														
Average Handle Time (AHT) — # of seconds agent is on call including ACW Time	▼	$$	☺										▼	■			▼	▼		▼	▼											▲(r)			
Conferences — Agent patches diff agent into call w customer	▼	$	☺						▼					▼	■						▼														
Consults — Agent puts customer on hold to get help from diff agent	▼	$	☺						▼					▼		■					▼														
Hold Time — # of seconds agent put customer on hold	▼	$$	☺										▼	▼			■	▼(r)		▲	▲														
Non-Talk Time (NTT) — # of seconds in call with silence from cust & agent	▼	$	☺										▼	▼			▲(r)	■		▲	▼														
Sentiment Score — Measure of positive/negative words or tone during call	▲	$	☺☺											▲(r)					■					▲											
Talk Time (NTT) — # of seconds in call with talking from cust and/or agent	▲	n/a	☺														▼	▼		■															
Total Handle Time (THT) — Total # of sec of handle time across multiple calls	▼	$$$	☺☺																		■														
Transfers — Agent sends customer to diff agent (or escalates to sup)	▼	$	☺						▼					▲(r)							▼	■													

Legend: ▲ = increases, ▼ = decreases (green = favorable, (r) = red/unfavorable); ■ = KPI self-intersection

Key Performance Indicator (KPI) (By improving this KPI, then what other KPIs are affected downstream?)	What is "Good"?	Cost $aved or $pent	Cust Exp	Abandon Rate	Auth Rate	ASA	Calls Abdn	Calls Handled	Calls Offerred	Containment	Handle Rate	Service Lvl (SL)	ACW	AHT	Conferences	Consults	Hold Time	Non-Talk Time	Sentiment	Talk Time	Total Hand Time	Transfers	CES	CSAT/OSAT	FCR	IR	NPS	Repeat Calls	Svy Take-Rate	Svy Volume	Forecast Accy	Attrition	Occupancy	Sched Adhere	Quality Score
Customer Effort Score (CES) CALC: # responding "Easy" / all responses	▲	$	😊😊																				■	▲	▲	▲	▲								
Customer/Overall Satisfaction (CSAT/OSAT) CALC: # of YESs / Total # of YESs & NOs	▲	$	😊😊																				▲	■	▲	▲	▲								
First Contact Resolution (FCR) CALC: (IR-Yes for First Time) / (Total IR-Yes + IR-No)	▲	$	😊😊																				▲	▲	■	▲	▲	▼							
Issue Resolution (IR) CALC: # of IR-Yes / (Total IR-Yes + IR-No)	▲	$	😊😊																				▲	▲	▲	■	▲								
Net Promoter Score (NPS) CALC: % of Promoters (9 to 10) — % of Detractors (0 to 6)	▲	$	😊😊																				▲	▲	▲	▲	■								
Repeat Call Rate % of customers calling back for same (or diff) reason	▼	$$	😊😊						▼					▲							▼		▲		▲			■		▼					
Survey Take-Rate CALC: Survey Volume / Calls Handled	▲	$	n/a																											■	▲					
Survey Volume # of completed customer surveys	▲	$	n/a																											▲	■					
Forecast Accuracy Accuracy of the forecasted call volume	▲	$$	😊	▼		▼	▼	▲			▲	▲																				■		▲	▲	
Attrition Rate (inverse of Retention Rate) Turnover of agents	▼	$	😊											▼	▼	▼																	■			
Occupancy (Agent Productivity or Utilization) Amount of time agents spend handling contacts	▲	$	😊																															■		
Schedule Adherence How well agents complied with work schedule	▲	$	n/a																																■	
Quality Score How well agents met quality requirements on call	▲	$	😊																																	■

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OKR v KPI

- Document your teams OKRs and KPI's

- Publish them for everyone to see

- Demand support from the business in resources (technical and physical) to deliver
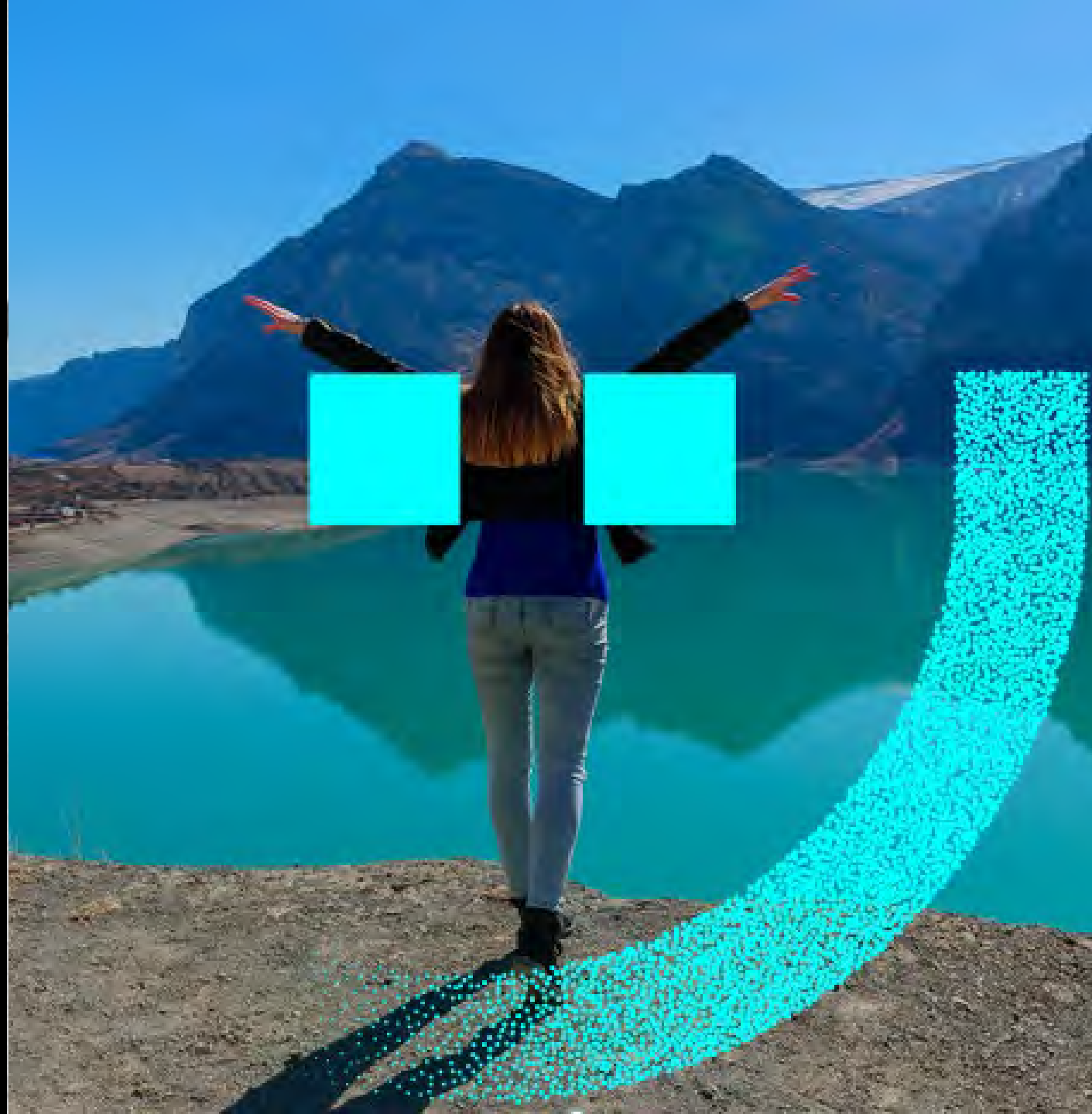
Departmental Strategy	OKR	KPI
Become the best WFM function we can be	Increase Employee Engagement	Increase ESAT scores by 20%
		Deliver 80% occupancy
	Deliver value for money	Increase Schedule Efficiency by 10%
		Forecast Accuracy range of +/- 5%

Customer Journey Mapping

- **Reduce customer churn**

- **Improve customer satisfaction**

- **Increase customer loyalty**

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Employee Journey Mapping

- **Reduce Employee churn**

- **Improve Employee satisfaction**

- **Increase Employee loyalty and retention**

Employee Journey mapping

An Employee's Journey

Recruit & Hire	Onboard	Engage	Develop	Progress	Exit

WFM	WFM	WFM	WFM	WFM

Performance Management

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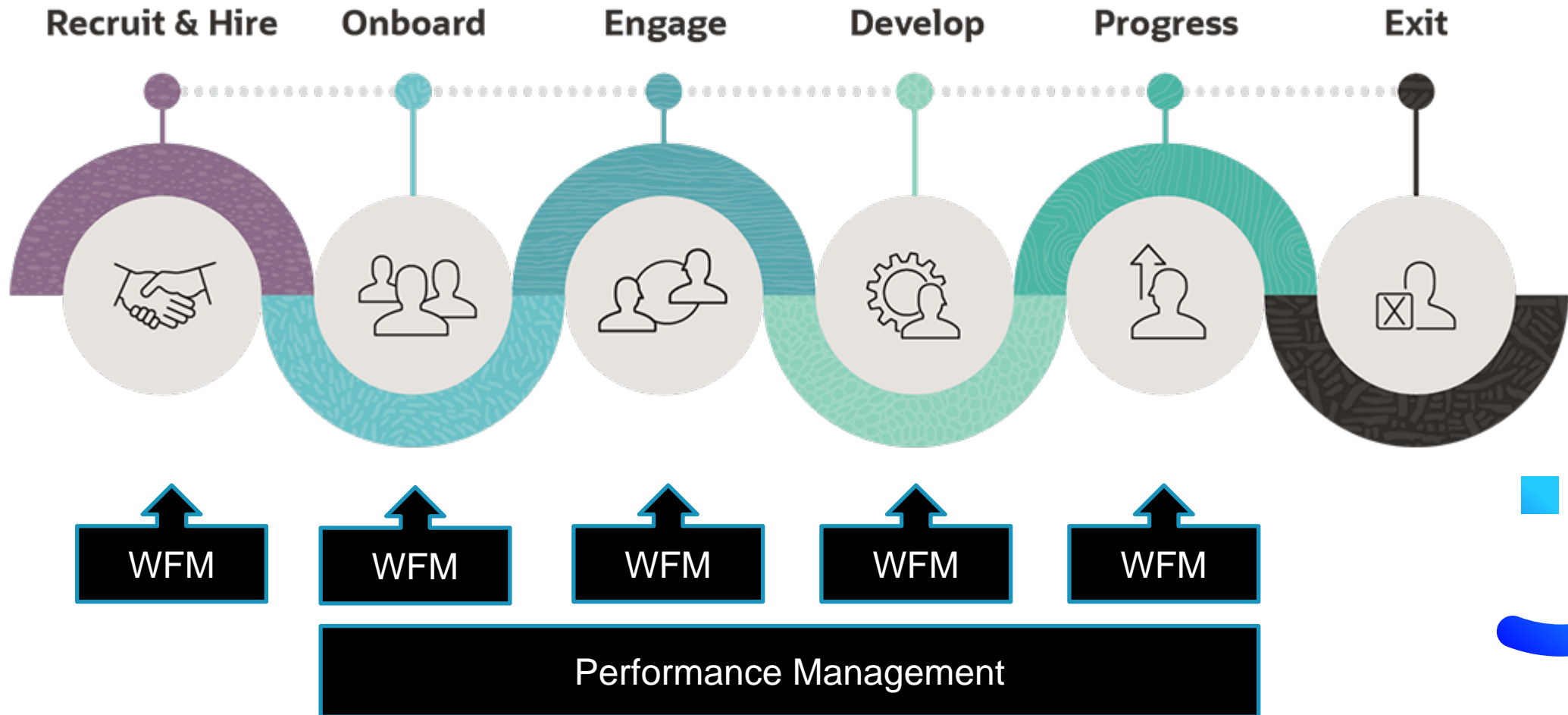
Preferences and choice

Ultimately, the team has to come first even though we all have individual goals and preferences.

Bill Belichick

Hobsons Choice

1: an apparently free choice when there is no real alternative

2: the necessity of accepting one of two or more equally objectionable alternatives

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Here is the Science bit…The Paradox of Choice: Barry Schwartz

Reactions to increasing choice

Positive Emotions

Zero

Number of Choices
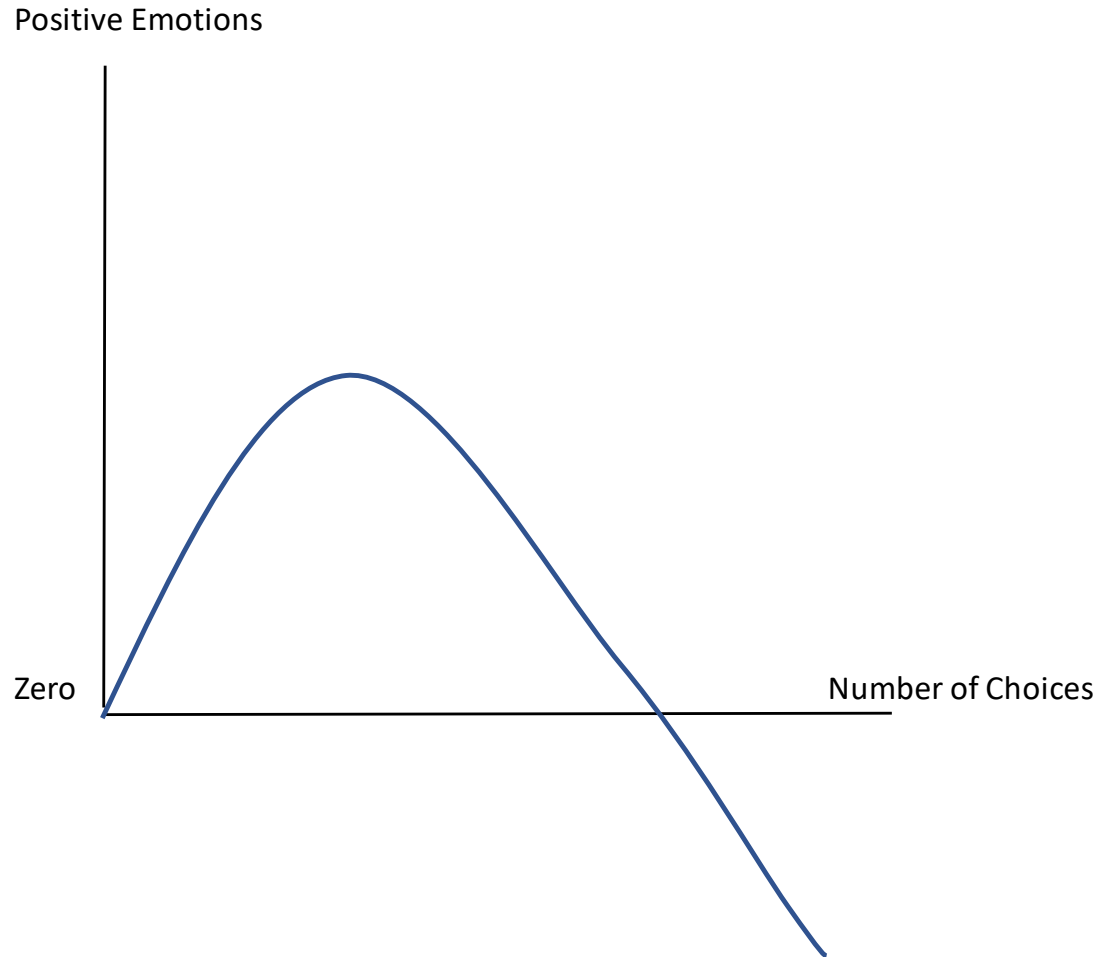
Escalation of Expectations

"Our love is one in a million, you couldn't buy it at any price.
But of the nine point nine nine nine
Hundred thousand other possible loves.

Statistically some of them would be equally nice.
Or maybe not as nice but say smarter than you
Or dumber but better at sport or tracing.

I'm just saying I really think that I would probably have somebody else"

Tim Minchin: If I didn't have you

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Reduce options by grouping "choices" under pre defined headings
Brand the choices by Lifestyle

Working Parents
- Split Shifts, term time working, Flexible and short notice changes.
  - Incentive: Merlin Pass

Gym Bunny
- Flexible starts around off peak gym membership, Split shifts
  - Incentive: Free local Gym Membership

Sports Fan
- Seasonality, Late shift flexibility, term time working, Flexible and short notice changes.
  - Subsidised Season ticket

Traveller
- Long Weekend options, School holiday working, Flexible TOIL.
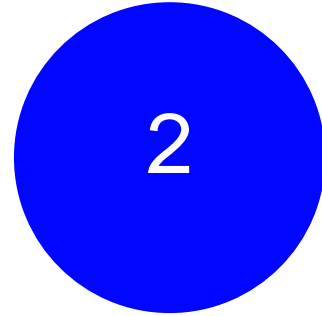 - Incentive: Caravan Club Membership

Rambler
- Less Late shifts in the summer, Flexible and short notice changes.
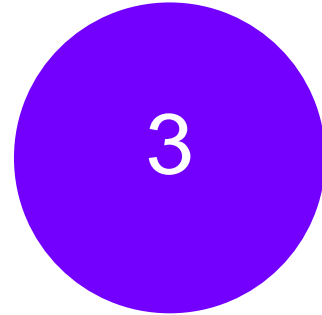 - Incentive: National Trust Membership.

Summary

1 Offer Choice

2 Don't offer too many

3 Customise by group

4 Review Regularly

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In Summary

What the best contact centres are doing with their WFM strategy?

How the latest technology can help

Quick wins for instant results

New ways to engage your agents so everyone wins

Increasing channel options for customers. Widening WFM principles across channels including Back office.

TTI analytics, expanding digital planning capability, Concurrency considerations

Assess and Audit your data and KPI's.

Widen options for agents to influence their schedules both before and after generation. But keep them contextual!

Thank You

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Make experiences *flow*