

Optimizing WFM

Strategy That Leads To Transformation

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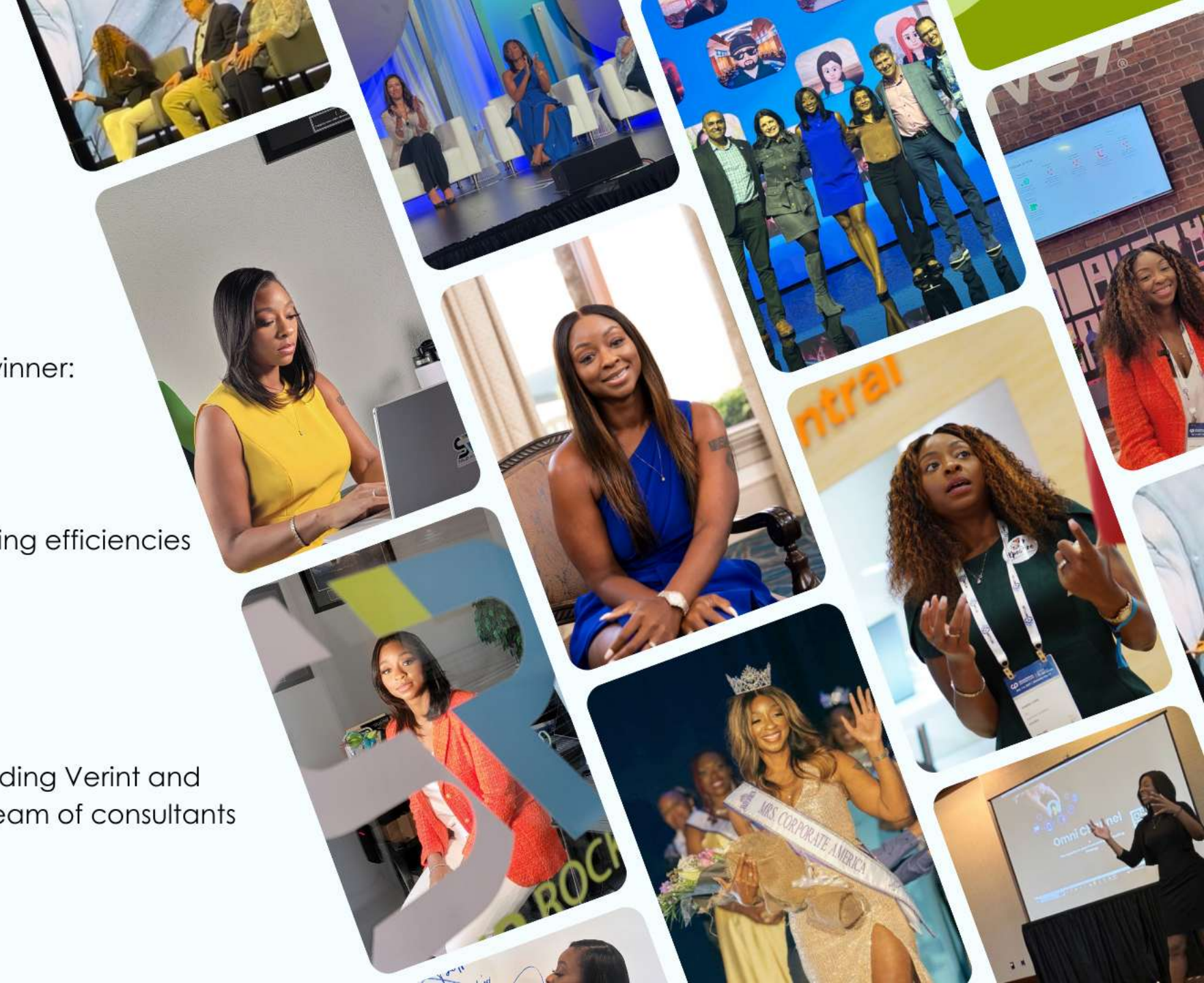
Recognized industry leader & award winner:

- Mrs. Corporate America 2022
- 2022 Most Influential Tech Advisor
- 2022 Top 25 Thought Leader

Over 20 years of expertise in WFM, driving efficiencies for brands like:

- United HealthCare
- Optum
- Walgreens
- Liberty Medical

Consulted for top WFM providers, including Verint and Aspect. Global presence—leading a team of consultants across the US, Canada, and EMEA.

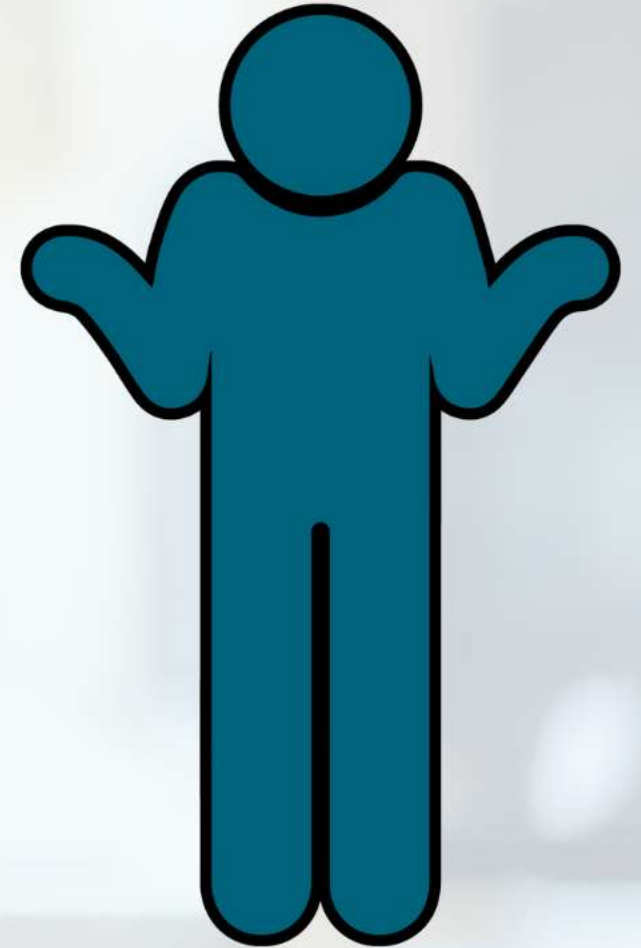


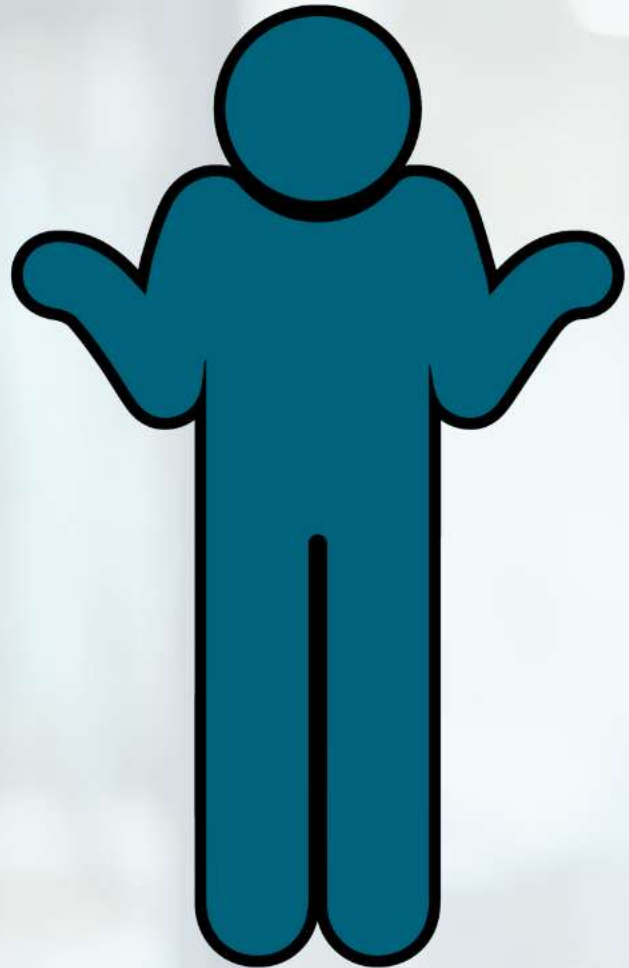
What could be more important to a business than their ability to obtain a **CUSTOMER** and their ability to obtain the **RESOURCES** to serve their customer?



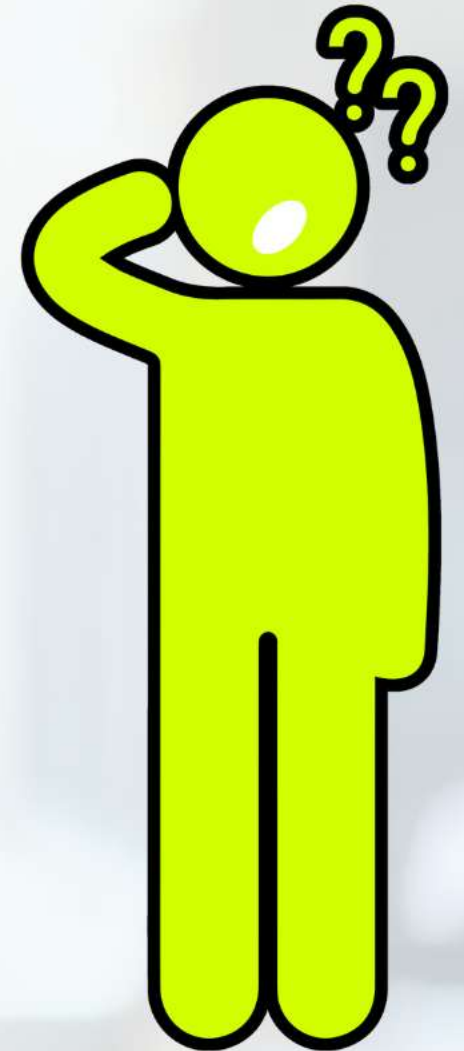


NOTHING!





ABSOLUTELY
NOTHING!



The Challenge

- Customers expect fast, seamless experiences.
- Employees expect flexibility, fair workloads, and support.
- Businesses expect efficiency, profitability, and customer loyalty.

When these needs **aren't** met, the result is **bad CX, high attrition, and lost revenue.**



The Solution

A strong **Workforce Strategy** that balances **all three**: CX, EX, and Profitability.

Without WFM:

- ✖ Overstaffing → **High costs**
- ✖ Understaffing → **Burnout & bad CX**
- ✖ No strategy → **Chaos & lost profits**



Mastering WFM is the BRIDGE between CX, EX and Profitability





What is WFM?

Definition: Workforce Management (WFM) is the process of aligning a company's resources with customer demand.

It ensures organizations have the right people, at the right time, to meet customer demand efficiently.

In Short: It's about **Supply** and **Demand**

WFM Tactics

The Core Four

Data Management

Forecasting

Scheduling

Intraday Management

WFM Strategy

Going Beyond



WFM Transformation Tip #1

Agent Experience

Skill Audit & Agent Profile Analysis

WFM Transformation Tip #2

Business Experience

Interval Analysis

WFM Transformation Tip #3

Customer Experience

Queue Analysis

Key Points to Remember

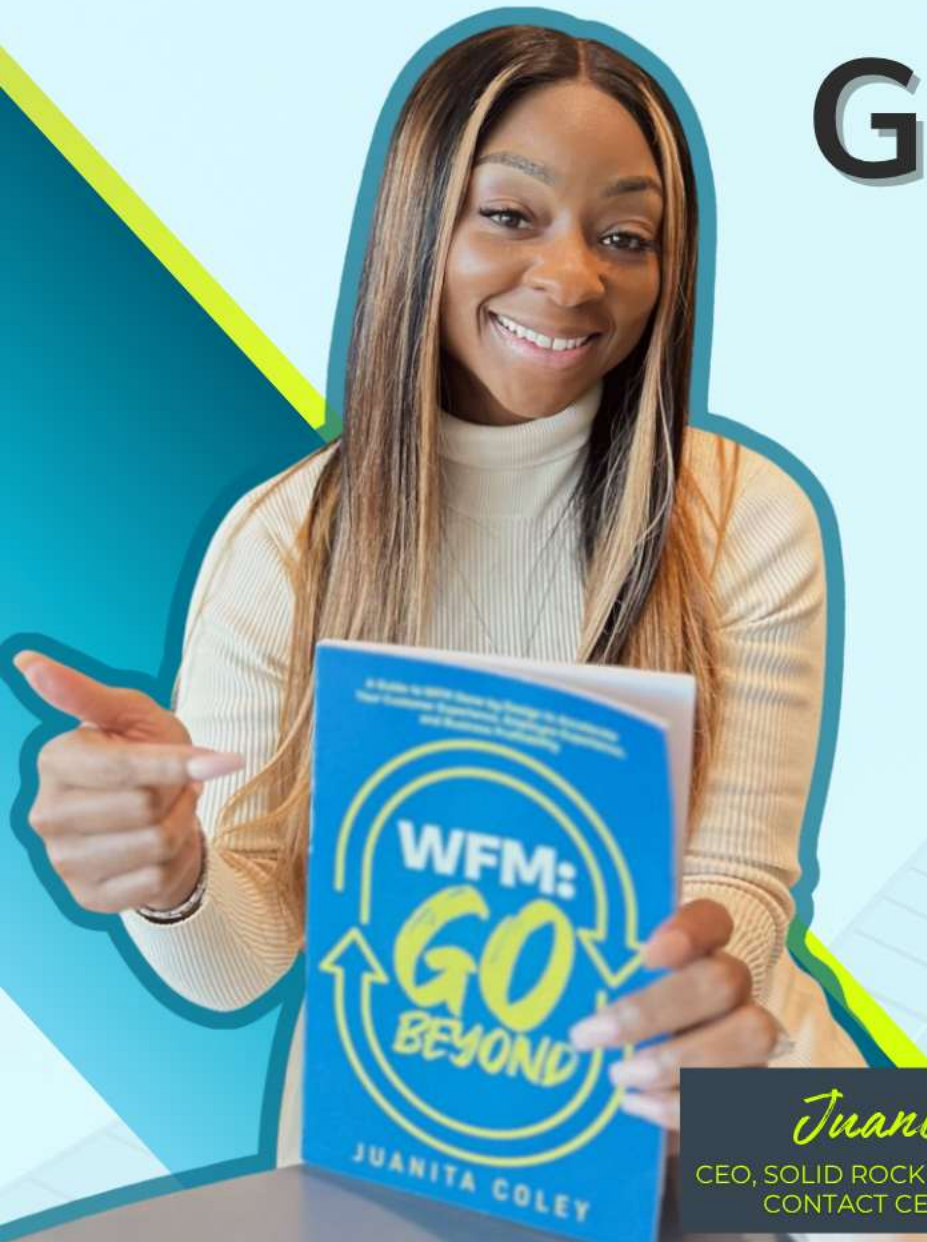
- ✓ Yes, the fundamentals are a MUST but we must GO BEYOND!
- ✓ Skill analysis ensures the BEST resource is paired with the right customer needs.
- ✓ Internal Analysis ensures we optimize business expenses and reduce agent idle time.
- ✓ Queue analysis ensures customers are routed appropriately and improves FCR!
- ✓ Your job isn't to just forecast and schedule! It's transformed into being a TRUST BUSINESS ADVISOR & PARTNER!

A yellow rectangular sticky note with a red pushpin at the top center. The word 'Remember!' is written in a large, black, cursive font.

Remember!

Grab your **FREE** Gift!

**Just Cover Shipping*



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