

# **Workforce Management for Non-Workforce Managers**

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# Introductions

- Michele Borboa
- 25 years of call center experience
- Former VP of Workforce Management at a large Fortune 250 corporation.
- Advisory board member for Society of Workforce Planning Professionals
- Call Center Consultant



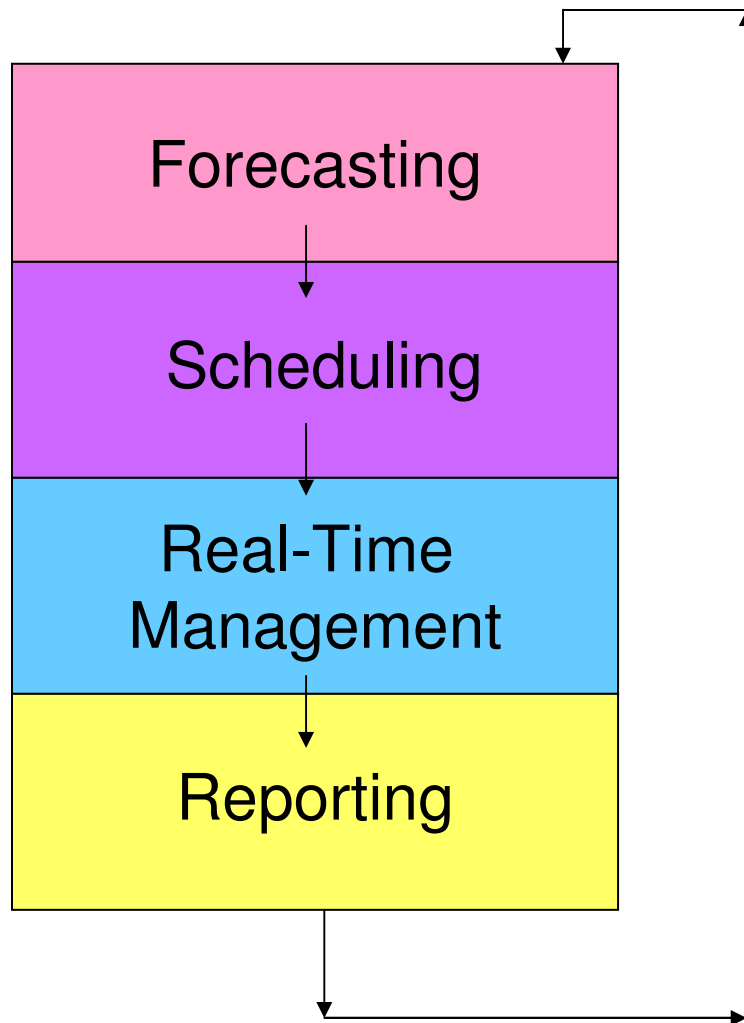
# Problem Statement

- Although the Workforce Management function can make significant contributions to caller satisfaction, employee satisfaction, operational effectiveness and profitability, many call center professionals do not feel confident in their WFM knowledge/understanding.
  - Communication challenges – WFM has a lot of jargon.
  - Conceptual challenges – Some WFM principles can seem counter-intuitive.
  - Perception challenges – WFM can seem mysterious.

# Course Objectives

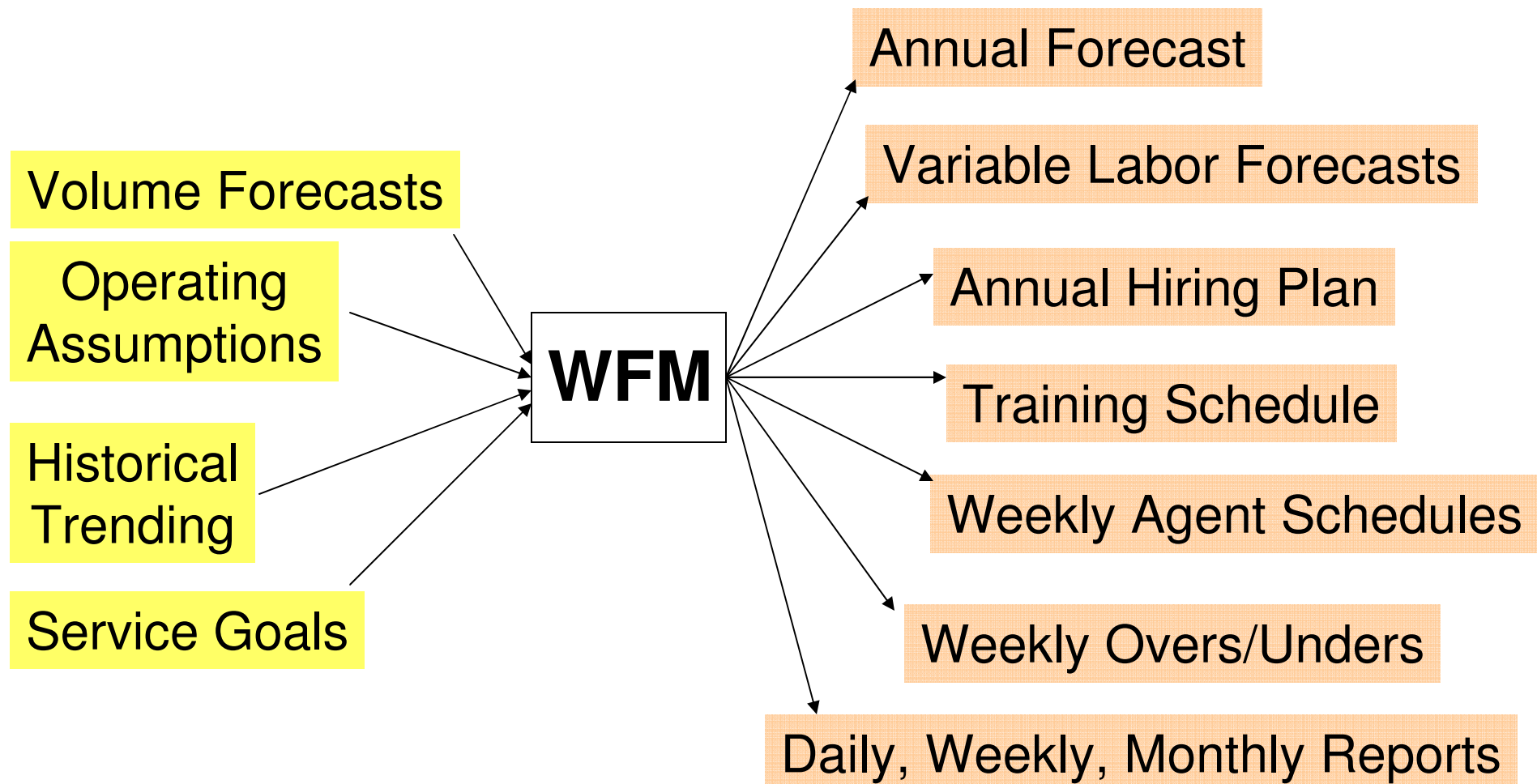
- Designed specifically for call center professionals who do not work in the Workforce Management (WFM) department, the goals for this session include:
  - De-mystifying WFM by explaining what the WFM department does in jargon-free terms.
  - Answering the commonly asked questions that persist about forecasts, schedules, and other components of the Workforce Management function.
  - Helping call center professionals maximize the effectiveness of the WFM function, and the contribution it makes to the center's overall performance.

# Defining Workforce Management



- Workforce Management (WFM)
  - helps the contact center
  - provide the right number of resources
  - to handle work
  - at the right time.
- Think of it as a continuous cycle.

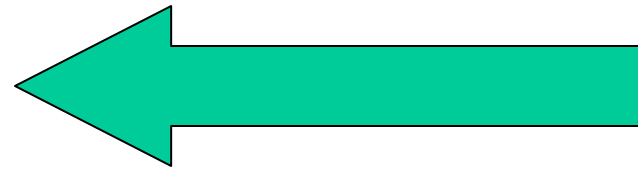
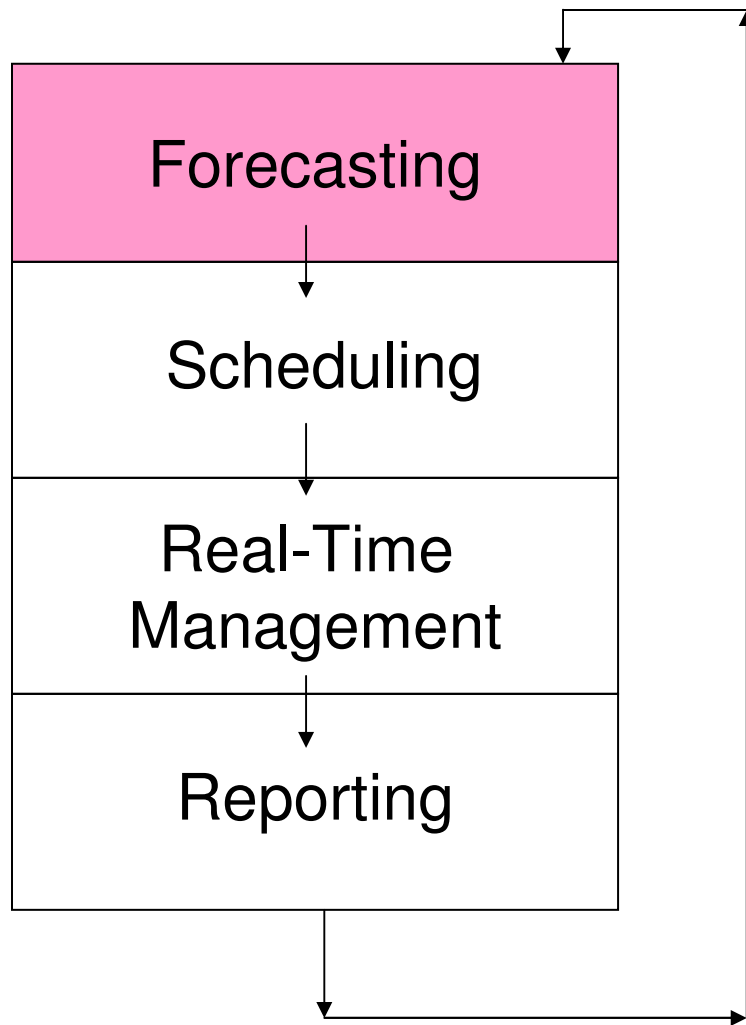
# WFM Inputs/Outputs



# But why bother?

- Random Call Arrival
- Invisible Queue
- Factors Affecting Caller Tolerance
- The concept of non-deferrable work

# Call Center Forecasting



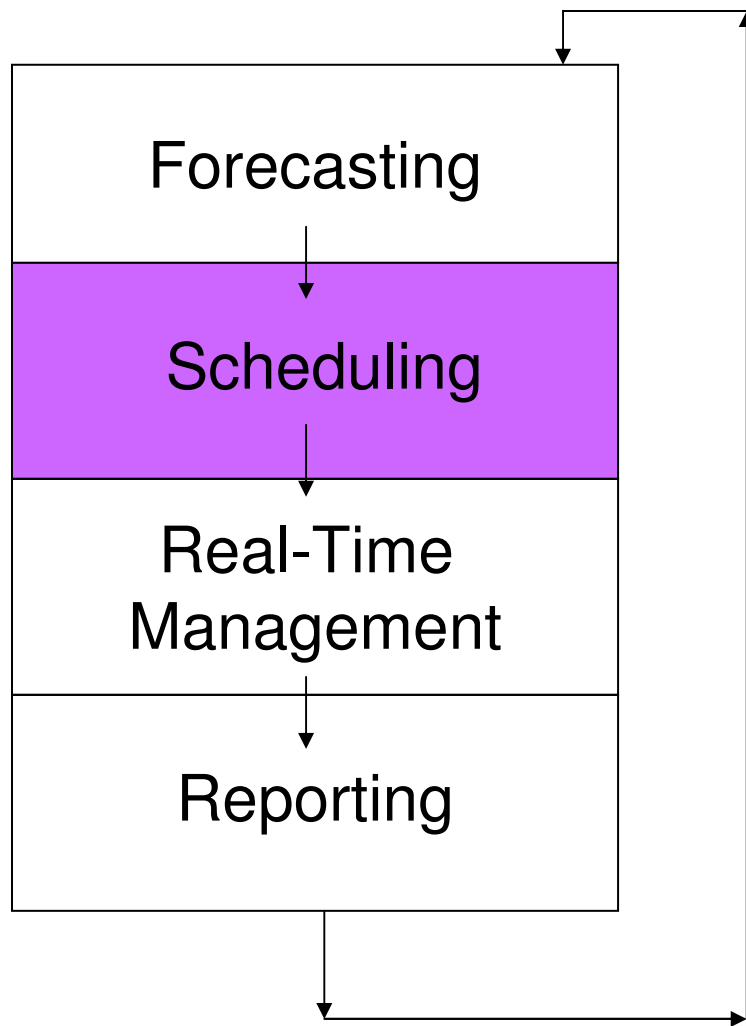


# Forecast Accuracy

- One thing we know is that forecasts will never be 100% accurate.
- The price of accuracy is often time; is that affordable?
- An accurate forecast is one of several workforce management tools used to achieve goals.
- Other 'clubs in the bag' include efficient schedules and nimble real-time decision making.
- Do you know your 'club length'?



# Scheduling



# Shift Bid Frequency

- Theoretically, schedules should be adjusted as often as call arrival patterns change, or whenever there has been turnover sufficient to cause gaps in agent coverage.
- Some centers bid right before and after peak season, or when the time changes.
- Some centers assign a fixed base of shifts that never change and only bid out a variable set of “flex” shifts periodically.

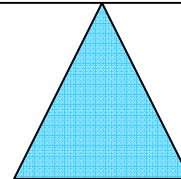
# Leadership Role

With shift bid frequency, and many other aspects of WFM, a center's leadership team must decide where on this spectrum it wants to be.

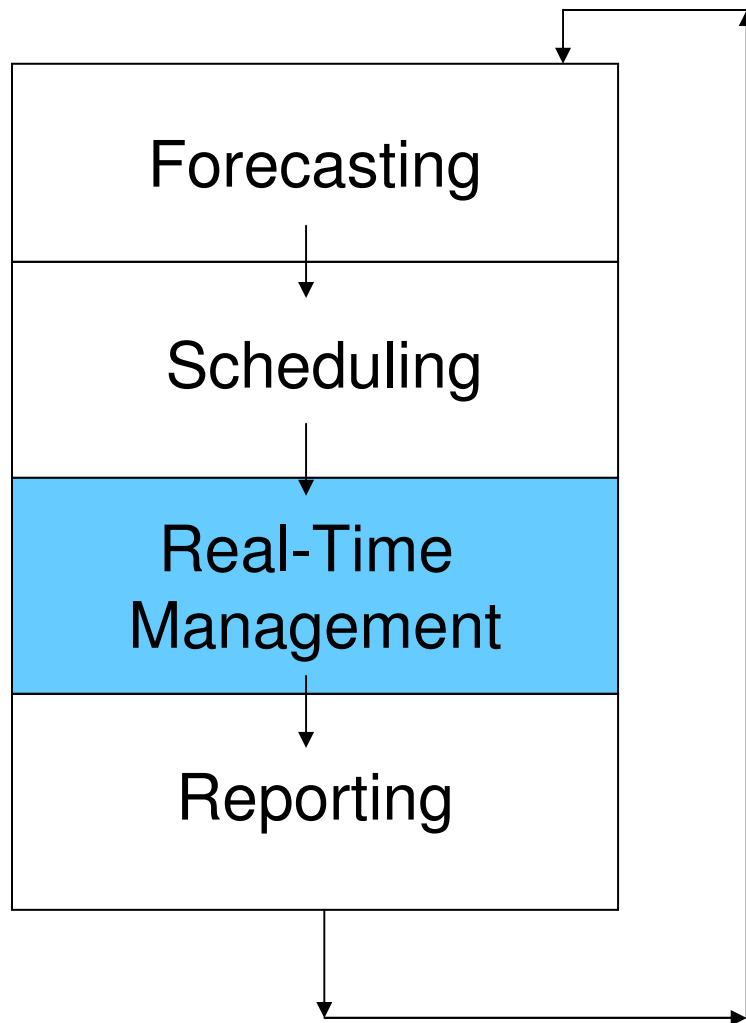


Country Club

Correctional Center



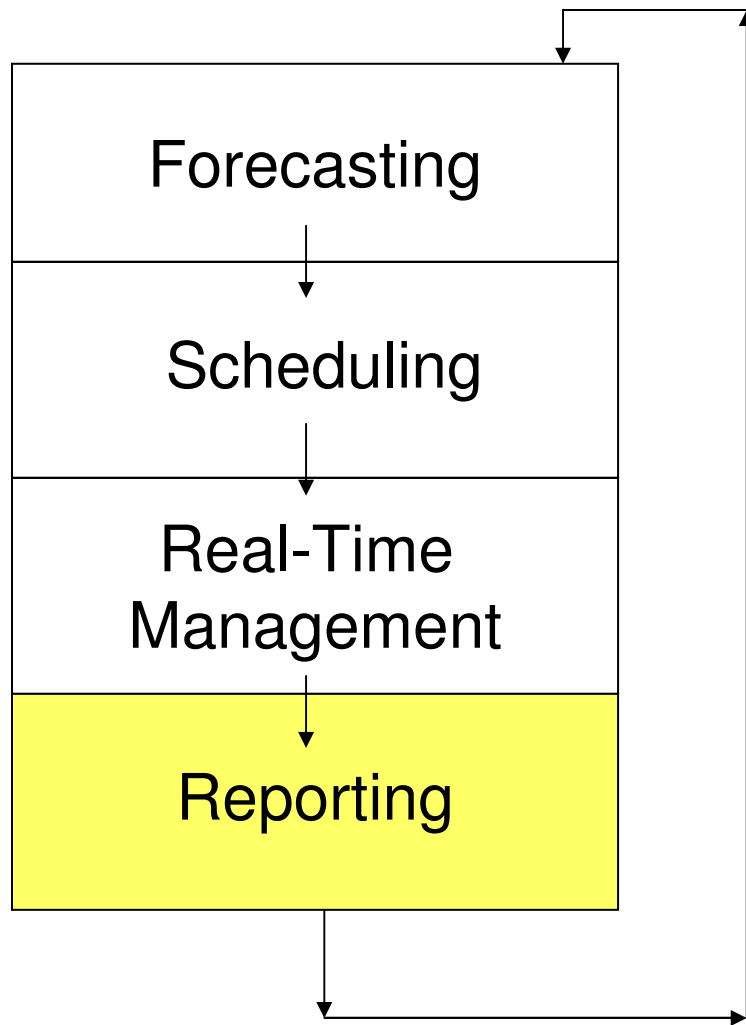
# Real-Time Management



# Schedule Adherence

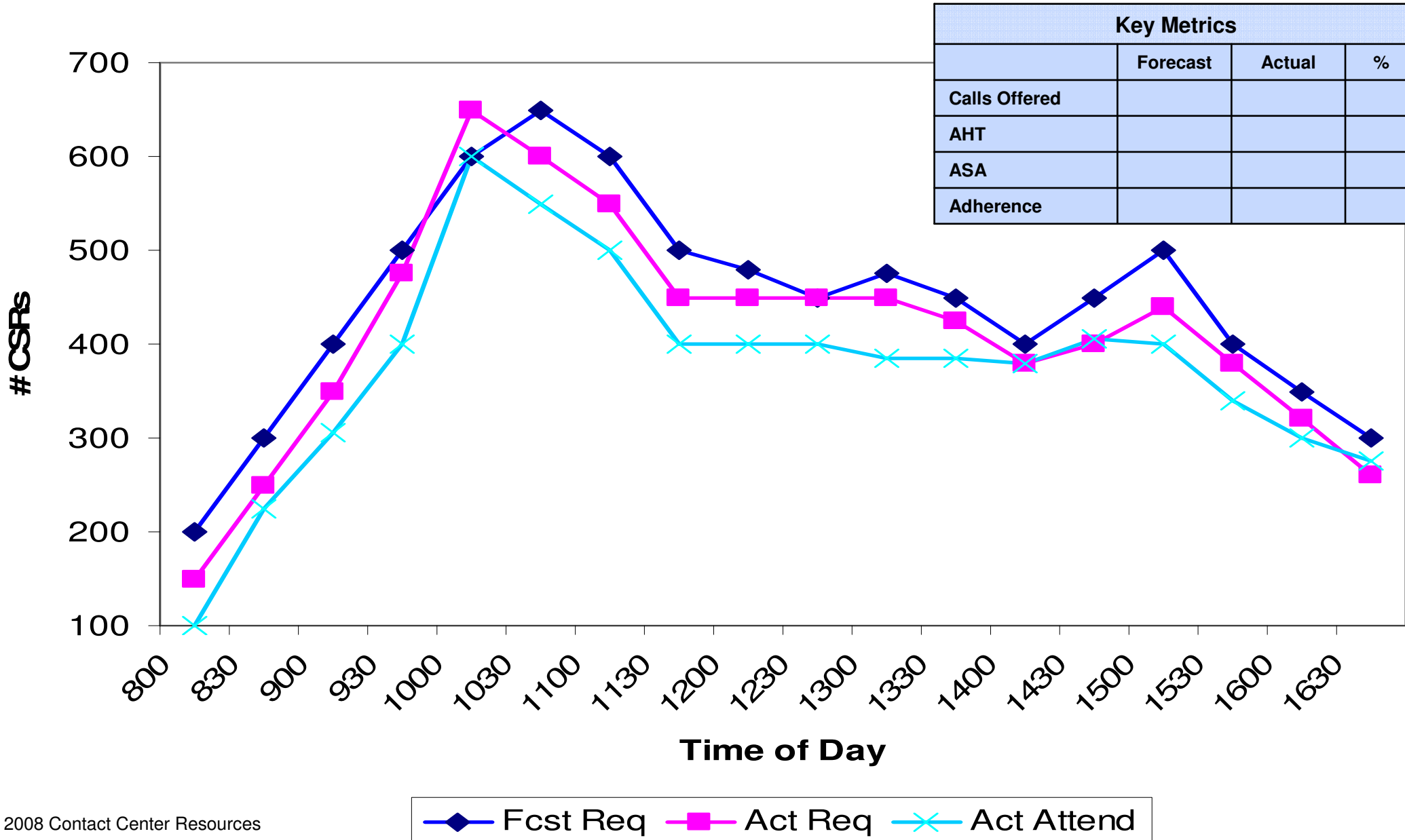
- One of the few metrics an Agent can actually control.
- More adherence = less shrinkage = reduced Agent requirement for the same workload forecast.
- Measuring adherence  $\neq$  bookkeeping adjustments. It's all about spending more time *on the phone*.
- Managing outliers is a good way to begin.
- Include Agents in the goal setting process.

# WFM Reporting



# Sample Daily Report Card

## Staffing Performance by Interval





# Non-WFM Role

*As someone outside of WFM, what should I be doing to support an optimal work environment?*

- Know the WFM basics, because they are call center basics.
- Set aside time during New Hire Training for a WFM topic.
- Ensure that Supervisors can answer Agents' basic FAQs .
- Make sure the WFM team has a seat at the planning table.
- Be prepared and engaged during budget prep season.
- Be open to/supportive of new, flexible practices.

# Contact Information

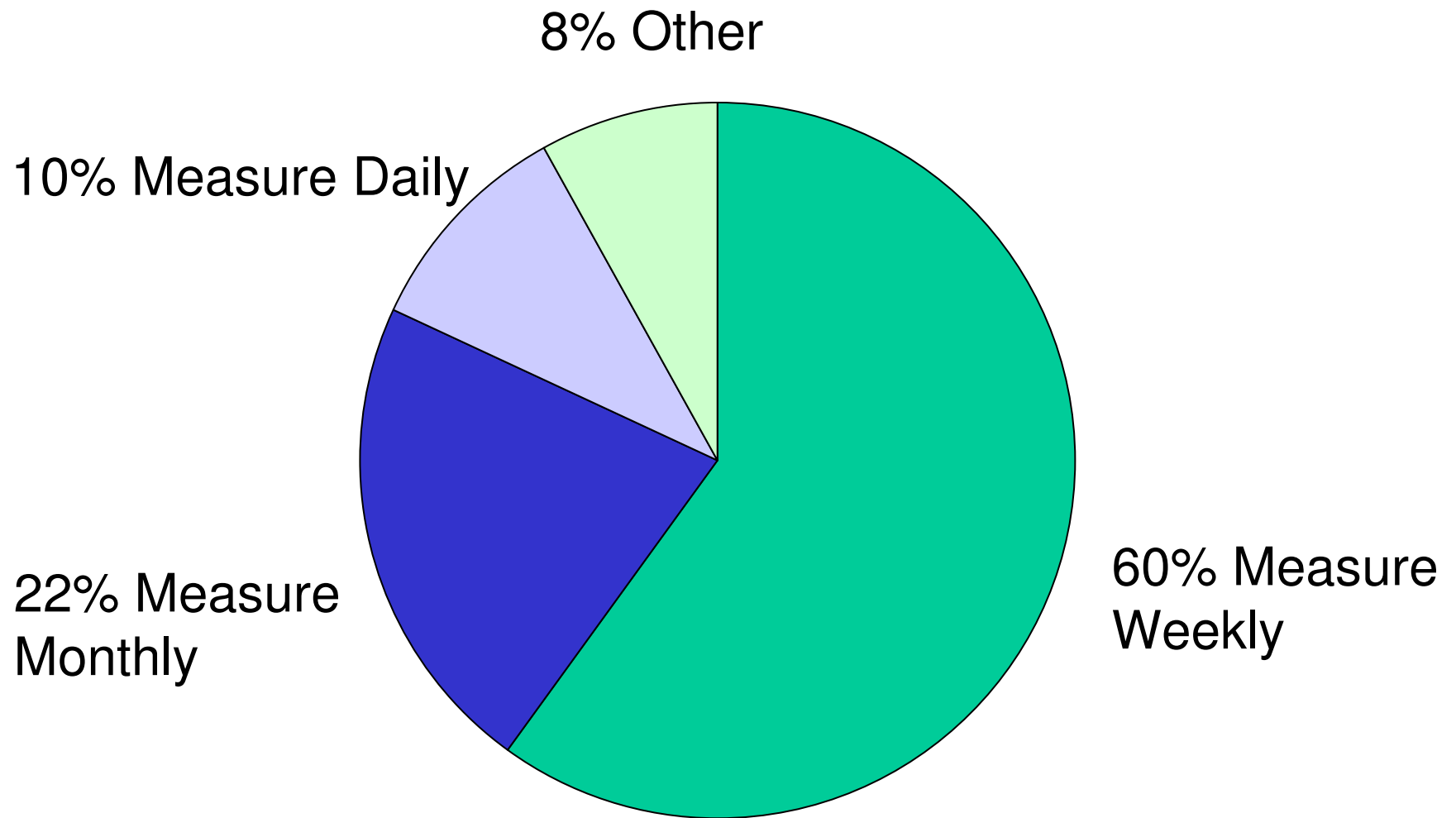


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# Reading List

- *Call Center Staffing* by Penny Reynolds
- *Call Center Management on Fast Forward* by Brad Cleveland & Julia Mayben
- *Navigating the Customer Contact Center in the 21<sup>st</sup> Century* by Bill Durr

# Forecast Accuracy Survey



# Forecast Accuracy Survey

- Of those who measure accuracy weekly, 68% of them are within 5% of forecast.
- Of those who measure monthly accuracy, and only about 15% of them are within 5% of forecast. (A little over half said there was a variance of between 16-20% to forecast.)
- Of those who measure daily accuracy, 73% were within 5-10% of forecast.
- These results pertain to call volume. Regarding Average Handle Time (AHT), all respondents reported being a little less accurate.

(Society of Workforce Planning Professionals Quarterly Survey, 2003)