Multi-Site Call Center Management Issues
By Maggie Klenke, The Call Center School

For many companies, the contact handling function is not centralized in a single call center environment. This may be due to a culture of local autonomy, mergers or acquisitions, disaster prevention planning, or growth to a large number of staff. When calls and other contact handling are dispersed across multiple sites, the workforce management process must be adjusted to accommodate the technology and management styles appropriate to the configuration of each company. There is no one "right" design.

Call Routing Options

There are three basic ways that the calls can be distributed among the sites. The first is to have each site operate independently, handling specific types of calls that are only handled there. One site might handle sales calls while another handles technical support. This is essentially like running two independent operations and the implications for WFM are that the work of forecasting and scheduling can be done at each site or centralized, but it must be done separately for each operation.

The second option is to route specific types of calls to one site first and then look to other sites in overload conditions or during after hours periods. This works well when there is a specialization by site, but a desire to keep one center open overnight and on weekends. It can also work where there is a large team of specialists in the primary site, with a few cross-trained individuals at the secondary site.

The third basic option is to treat all staff in all sites as if they were co-located, routing each call to the longest idle or next available agent in that skill. This typically requires a telecommunications system that queries each site before routing the call to the most appropriate each time. This is an appropriate configuration when there is staff trained to handle the same types of calls in two or more sites working during the same hours. This supports contingency planning and disaster recovery scenarios as well as providing for the highest level of economies of scale in the staffing model. It also allows a large operation to tap into dispersed workforce groups to find enough people to handle the workload.

One might think that having agents who work at home as a multi-site configuration, but for WFM purposes it is not. These agents are typically connected to a centralized telephone system and are treated just like the personnel who work in the center in terms of call routing, so they are scheduled as if they were in the center as well.

WFM Tasks

The tasks of the WFM can be centralized or dispersed for any of the technical configurations mentioned above. The driving issues are often political rather than functional. The following explores the tasks of forecasting, scheduling and intraday management for each.

Forecasting

In any situation in which calls are handled only at one site, the forecast can be done by site since site and call type are essentially the same. This forecasting can be done for all sites by a central team or done locally if preferred. But if the calls overflow or seek next available agent across sites, the forecast for the workload must be done centrally for that entire call type, regardless of where the call might be answered.

Scheduling

Scheduling for calls handled at a single site must be done separately from other call types. If sales calls are handled in Boston and technical support in Denver, for example, each would need to be scheduled separately, but it has little to do with the fact that the calls are handled at different sites. It is because the calls are handled by totally independent teams. The separate scheduling would be needed even if both call types were handled in Boston, but by separate agent teams. This schedule can be created by a WFM team in each site or it can be done centrally as the company prefers.

Scheduling for the operations that share call workloads is a bit more challenging. The forecast is completed for the work type regardless of where the calls are answered, as noted above. But how the schedules are created is a matter of choice. The first option works when the call center uses some type of call allocation technology that gives a percentage of calls to each site. In this case, the forecast can be broken down into separate pieces based on those allocations so that a defined workload is forecast for each site. At that point, the schedules can be created for each site independently so that the team effectively covers its allocated work load. In this type of configuration, the site call center managers are responsible for the staffing to meet the allocated work load and the service levels provided. Once again, the schedules can be created by a site-based WFM team or centrally.

The second option is for the central forecast to be taken to the next step that identifies the number of "bodies in chairs" needed in each period to handle the total workload. It is then this requirement for staff that is allocated to the sites based on hours of operation and percentage of headcount. With this allocation of staffing requirements, the schedules for each site can be produced independently, either by a site-based WFM team or centrally. This works well in centers where the work rules or desires are different among the sites. Perhaps one site prefers all hour lunches but another has an on-site cafeteria and prefers half-hour, or one likes to offer 10-hour shifts but the other doesn't. One site may use seniority bidding while another is using performance based choice. Care must be exercised so that all the "good" early shifts are not allocated to the sites farthest east and the "bad" late shifts to the sites farthest west unnecessarily. In this configuration, the site call center managers are largely responsible for ensuring that the bodies are in the chairs to meet the plan, but the service level is more a function of accurate scheduling so is not the primary goal of the site manager.

The third option is for the central forecast to be used to create a single set of schedules for all sites. This is done by a central WFM team. When the schedules are created, then they are allocated to the sites and staff based on the usual rules of hours of availability, preference, performance, etc. Once again the site managers are not responsible for the service level so much as ensuring that the schedules are adhered to according to the plan.

Another consideration in multi-site shared call environments is the options for time off and shift trades. Some centers prefer to manage the staffing changes within each site separately, but there are some advantages to allowing personnel to be treated as a single team so that trading shifts across sites is accommodated (as long as it remains within the hours of operation of each center). This makes it possible to better meet agent desires without impacting the customers.

Intraday Management

Intraday management in a multi-site configuration can be centralized or dispersed under almost any of the above configurations. The key issue is that where calls are shared across sites, there must be good communication and coordination as staffing changes in one site will potentially affect the others. So many organizations choose to centralize the intraday monitoring and management role to reduce this coordination requirement. Determining whether one site can have an unplanned meeting or not must be done with a view to the implications across the board. But one of the drawbacks of centralization is loss of strong ties between the WFM team and the agent and managers at the remote sites. Perceptions of favoritism toward the site where the team is co-located are common, and may even be reality, so care is needed to treat all personnel the same.

Advantages of centralization of the intraday team include ease of monitoring the whole operation more easily, minimal staff required for the function, and the ability to share the expertise of skilled WFM team staff across the sites. This is not to say that local supervision and management is not still responsible for ensuring schedule adherence, because they are. It may also minimize the investment in WFM technology required when only one site must be set up with the monitoring capabilities.

Summary

As you can see, there are a lot of WFM options in multi-site operations and few are totally dictated by the routing technology or the configurations. The choices are often a function of where WFM talent is available, whether the company prefers a centralized or decentralized management model, and the variations of operating rules that the company wishes to accommodate on a per site basis. And it is not uncommon for one WFM process to be adopted for a while and then shift to another if it doesn't work out perfectly or is there is a change of management, so it is best to ensure that flexibility to change is considered in both WFM staffing and in the WFM tools utilized. Here, as everywhere in the call center, change is the only constant.