Don’t let the title scare you. Switching from tenured to performance-based scheduling can be a tough proposition, but in the long run it can be very rewarding and successful.

Prior State

For years, our contact center schedules were determined more on what the employee was willing to work, rather than what the need of the business was. The WFM team’s focus was more on where to fill the gaps with new hires. Most staff wanted an early morning start time and we would frequently find ourselves being overstaffed during the early morning hours and understaffed during the later hours. We eventually evolved into a twice a year scheduling adjustment, where the WFM team determined the number of start times needed. Management would do their best to keep current staff’s schedules the same, however there would be some shifting of start times to match up with the WFM schedule recommendations. Seniority dictated the start time a staff member was able to obtain. Staff with more seniority had a fix on the early morning start times and it was extremely difficult for anyone else to obtain these spots.

The Solution

We knew it was necessary to match up the schedules to the workload. Several options were discussed between WFM and operations to develop the best solution for all involved. After several months of discussion it was determined we would use performance-based scheduling, with seniority only being used as a tiebreaker. Performance would be based on an agent’s results compared to goals for Quality, Adherence, and time available to the customer (this is measured as a percentage of ACD Time + Available Time compared to Staffed Time). Goals are set based on experience level. The expectations of an agent with six months experience is not the same as the expectations of an agent of two plus years experience.

Initial Stages

This was a huge undertaking for our three contact centers and we knew for it to be successful, there would have to be plenty of communication between WFM and Operations. We elected to begin with the contact center that had the most experience with WFM tools and processes. However, communication began flowing to all three contact centers immediately. Communication and education began 9 months prior to the start of the first performance-based schedule bid.

WFM and Operations began the process by determining the formulas to use for scoring and ranking the frontline staff. Management communicated with staff via email, discussions during team meetings, as well as one-on-one meetings. This helped management determine the turnover risks they would face during this process. Extra attention was given to those staff members who management felt were a risk to terminate due to this change.

Next Steps

WFM spent several months running workload and scheduling forecasts to determine the optimal shifts and start times to offer. The goal was to come up with schedules that would meet the workload needs, as well as offer a variety of schedules from which to choose. Staff were solicited to determine the types of shifts that would be of interest to them. Based on employee feedback the following shifts were developed for the bid.

Continued on page 11
This article details the results of the most recent SWPP quarterly survey on critical workforce planning topics. In this survey, which focused on the utilization of remote agents, almost 200 call center professionals representing a wide variety of industries participated and provided insight into the utilization of remote agents in the call center.

**Participant Profile**

In this survey, the largest percentage (40%) of the participants was from large call center operations with over 500 seats, followed by 17% with 100-200 agents. Sixteen percent had 200-300 agents, while 16% have less than 100 agents.

The largest percentage of participants was from the Financial, Insurance and Telecommunications industries.

**Utilization of Remote Agents**

Thirty-seven percent of the survey participants utilize remote agents. Almost the same percentage (36%) are not utilizing remote agents and are not currently considering it. Twenty-seven percent are not utilizing remote agents but are considering it.

Those who are considering the use of remote agents were asked why they were considering it, and here is a sampling of the responses:

- We are looking to utilizing remote agents for various factors. These include employee satisfaction, disaster recovery, and improvements to coverage with possible split shifts or other non-traditional schedules.
- The rising cost of petrol and transport. We are also a growing business with limited physical capacity.
- Scheduling flexibility. We are in the process of upgrading our phones, switches, etc., which will (hopefully) give us the ability to let people work from home in a more cost-effective manner than we can currently do.
- We are particularly interested in using remote agents for the midnight to 8am shift mainly to allow for easier recruitment and a more stable workforce overnight.
- To provide employee flexibility and to help us fill split shifts and overnight shifts.
- To retain top talent.
- To fill in gaps of Full Time agents create during peak volumes.
- Seating capacity within the center. To further enhance our scheduling capabilities — we are a union environment. It will also be a way to say thanks to those that continually over-achieve.
- A large reason is reduced overhead, but there is also the advantage of improved morale and reduced shrinkage from weather-related events and illness.

In a similar survey from 2006, the results showed that only 30% of respondents were using remote agents, but 44% were considering it. The reasons for considering remote agents or not considering them were mostly the same.

**Percentage of Remote Agents**

Eighty-four percent of the respondents said that the remote agent population in their center was less than 25%. Thirteen percent said it was 25-50%, while only three percent said it was 76-100%.

We also asked those who are not considering it to tell us why. Here are some of those responses:

- Data security issues are a major concern.
- Call centre is too small to consider this option.
- Lack of control and training issues.
- Company culture.
- Security/Fraud concerns.
- Technology cost and constraints.
- The cost of setup will be out of the forecasted budget plans at this time.
- Compliance and security officers roadblocks.
- No need for them.
- Remote security and training of remote agents.
- We are a Union Shop and we are subject to stringent Medicare restrictions which require us to guarantee the privacy of our members. Both of these restrictions have lead us to avoid this consideration.
- We do not have the technology in place to support such an effort.
- Complexity of products, security of information.
- Technology limitations and size of each group.
- No way to secure the customer banking information under the current standards.
- We don’t yet think it would be worth the investment in time and equipment.

In a similar survey from 2006, the results showed that only 30% of respondents were using remote agents, but 44% were considering it. The reasons for considering remote agents or not considering them were mostly the same.
SWPP conducts a survey each quarter on critical workforce planning topics. These results will be published in upcoming issues of On Target, as well as on the SWPP website in the members-only Library section. You may fax this page to 615-352-4204 or fill in the survey online at www.swpp.org.

1. **How many agents are in your call center?**
   - Under 50
   - 50 – 100
   - 100 – 200
   - 200 – 300
   - 300 – 400
   - 400 – 500
   - Over 500

2. **What industry do you represent?**
   - Telecommunications
   - Travel
   - Financial
   - Insurance
   - Utility
   - Retail/Catalog
   - Government
   - Health Care
   - Outsourcer
   - Other

3. **What period do your schedules cover (one week, two weeks, etc)?**
   - One week
   - Two weeks
   - Three weeks
   - One month
   - One quarter
   - Longer than one quarter

4. **What is the first day of your schedule week?**
   - Monday
   - Tuesday
   - Wednesday
   - Thursday
   - Friday
   - Saturday
   - Sunday

5. **What is the reason for selecting your first day of the week?**

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

6. **Do you run on a:**
   - Calendar year
   - Fiscal year
   - ISO year

7. **How far in advance do you finalize your schedules?**
   - Less than one week
   - One week
   - Two weeks
   - Three weeks
   - One month
   - One quarter
   - More than one quarter

8. **Do your weekly schedules guarantee two consecutive days off each week?**
   - Yes
   - No

9. **Can agents express a preference for any of the following? (Select all that apply)**
   - Start time
   - Lunch length
   - Days off
   - Shift Length

   If so, how often can agents change their preferences?
   - Anytime
   - Weekly
   - Monthly
   - Quarterly
   - Longer than quarterly

**Respond and Win!**

Not only will you receive a report of our findings, but you'll have a chance to win a free SWPP Membership for responding to the survey. Please return to SWPP by October 31, 2008. **Congratulations to Lisa Morley of Contact New Zealand, who won a free SWPP Membership last quarter for completing the SWPP survey.**

Name __________________________________________

Company _________________________________________

Email Address ____________________________________
Managing Daily Staffing and Service
By Penny Reynolds, The Call Center School

The pieces are in place. You gathered and analyzed mounds of historical information to arrive at a call forecast. Then you calculated the number of staff needed by half-hour to meet your center’s speed of answer goals. Finally, you juggled schedules until you arrived at a reasonable mix of efficiency and acceptability. All this planning means that you should have the “just right” staff in place every half-hour to match the workforce to the workload. But you know what they say about the best laid plans…

This article will outline the steps of tracking call center performance within the day to ensure that the plan is actually working based on the realities of the day.

First Things First
The last four articles in this series have outlined how to get to a schedule requirement by half-hour. Once the forecast is done and schedules have been assigned, the next step of the process is to manage the daily schedules to ensure service levels are being met half-hour by half-hour.

The Real-Time Tracking Process
There are three steps in the daily performance tracking process:
Step 1: Tracking
Step 2: Communications
Step 3: Reaction

Tracking and Analysis
Tracking performance within the day means tracking the three elements that affect service: call volume, average handle time (AHT), and staffing levels.

Let’s take a look at how a variation in any one of these components might affect net staffing and service. For example, what if staff adhered to schedule and the call volume forecast was right on target, but calls took 30 seconds longer to handle than planned?

It’s easy to imagine a scenario where calls simply take longer to handle than planned. Perhaps the computer system is slow today, or a different format for the billing statement causes an extra question per call. Or perhaps this is the week a new hire class comes on the phones and their longer handle times drive up the average from 320 seconds to 350 seconds.

With this longer handle time as the only variation, staffing requirements are affected significantly. In the above example, staffing at 8:00 would need to be adjusted from 82 to 90 staff in order to meet an 80% in 20 seconds service goal. If staffing is not adjusted, the service level will drop to only 6% of calls answered in 20 seconds.

Of course, things might go the opposite direction and workload could be less than forecast. Consider the effect on staffing requirements and service level if the marketing campaign doesn’t go as well as expected and call volume is 10% lower than planned.

This time at 8:00, only 75 staff will be needed instead of the 82 that are scheduled to work. With everyone on the phones, service level will be 98% in 20 seconds. And while that’s great from a service perspective, the overstaffing represents an unnecessary expense.

Tracking Schedule Adherence
Since one of the three factors to track by half-hour is staffing, a critical piece of the daily management plan is tracking and managing schedule adherence. You’ll want to match up real-time status and work state information from the ACD against planned schedules and daily schedule exceptions to effectively track whether staff members are doing what they’re supposed to be doing.

Historical information about adherence and compliance is useful, but what’s really needed in an intra-day environment is

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real-time adherence information. This can be achieved by walking around and checking filled seats or can be done quite effectively by a workforce management system. These real-time adherence systems can take real-time status messages from the ACD and compare to an agent’s work schedule for the day. Any variations that exceed user-set thresholds are reported immediately.

For example, suppose Rachel’s supervisor has set a five-minute “grace period” for getting back from breaks and lunches. Rachel is scheduled for a break from 10:30 – 10:45. As long as Rachel is back by 10:50, nothing is reported. But at 10:51, if Rachel isn’t logged back in and available, her name pops up on screen as out of adherence.

While these tools may be viewed as “Big Brother” or “Watchdog Technologies” by some, they can be an effective way to make sure the third component of the half-hourly puzzle (staffing) stays on track.

The Real-Time Picture

It’s important to track the three components of call volume, handle time, and staffing levels throughout the day to see what the impact will be on net staffing. You’ll want to start early in the day and watch these numbers to see if any significant patterns are developing. As soon as you spot a trend that seems to be consistent, it’s time to reforecast based on the new numbers and predict what net staffing will be as a result for the remainder of the day. If you catch it in time, you can fix it before it’s too late.

While all three numbers should be tracked against one another and used to calculate net staffing, there are single numbers of half-hourly performance that may provide a quicker look at whether or not you’re in trouble. These measures of call center performance can indicate if all is well or about to get out of hand.

For this snapshot of performance, some call centers use a measure of the number of calls in queue. They may set a threshold so that as soon as a certain number of waiting calls exist in the queue, a reactive process occurs. Others use the age or length of the oldest call in queue and when that wait time exceeds a defined limit, a reaction is imminent. Both of these are true real-time measures and represent a snapshot in time.

The question at hand is whether these are the measures that should be used to actually direct the real-time reaction process. It is our opinion that while these two measures are useful as warning signals, using them to initiate adjustments may be ill advised.

Think instead of setting and meeting service objectives as one half-hour race rather than six five-minute sprints. While an exceedingly high number of calls in queue at any given time might be alarming, it is likely that this number may go back to normal within five or ten minutes as breaks overlap or the natural ebb and flow of random calls happens. You should evaluate carefully before using these real-time measures to drive changes and adjustments.

So what is the single best indicator of performance and service if not those real-time snapshots? Actually, service level or average speed of answer (ASA) for the half-hour is not only the number that should represent the day’s service picture, but should also be the measure used in each half-hour to drive adjustments and reaction strategies.

Communications Strategies

Once the numbers indicate that overstaffing or understaffing is happening, the next step is to communicate the problem. Developing a communications strategy involves deciding what to communicate and who should be in the communications loop.

It is likely that the workforce planning specialist or team will be the first to know there is a problem. This group may communicate directly with staff for the necessary adjustments, or may relay the information by team or by supervisor where changes are needed. This communication may begin as soon as there are warning indicators in order to provide a “heads up” about coming changes, or may not occur until it is time to actually make the adjustments.

Reaction Options

It’s important to have a reaction plan in your back pocket for situations that require just a little tweaking as well as major adjustments. You should always know your options whether you need to add or subtract two staff or twenty.

Selecting a strategy depends upon answers to the following questions:

• How severe is the problem?
• What is the effect on service level to customers?
• Can you fix the cause rather than react?
• How long will the problem last?
• What are the options from easiest to hardest?
• What will each adjustment cost in terms of dollars, resources, and effort?

Common staffing reaction strategies for understaffing include:

• Have supervisors or other staff take calls
• Delay meetings or training
• Eliminate optional call content
• Engage other qualified staff or outsource

Likewise, understaffing can also be addressed by making technology changes such as:

• Re-routing calls to other sites or groups
• Adjusting delay announcements
• Changing ring delay settings
• Adjusting trunks
• Invoking other technologies such as IVR or callback messaging

As seen in an earlier example, sometimes the adjustments need to go the other way. In cases where overstaffing is apparent,
The Contact Center Decision Making Cycle

By Ric Kosiba, Ph.D., President, Bay Bridge Decision Technologies

There is a powerful new concept called "Enterprise Analytics" that has been introduced to contact center operations over the last few years. This concept leverages robust mathematical technologies, such as mathematical optimization, simulation modeling, and forecasting techniques against the big picture contact center decisions we are often asked to analyze (without the time to do it!). Basically, Enterprise Analytics is the application of engineering principles and technologies to contact center enterprise performance monitoring, forecasting, scenario development, plan development and evaluation, business risk analysis, and ultimately, strategic decision making.

I’ve spent a fair amount of time thinking about Enterprise Analytics and the way that contact center organizations make decisions. So, what is the “standard” decision making process?

I spoke with some call center planners and executives, along with our Vicki Herrell, and think that this next statement rings pretty true: the contact center operation is 90% reactive and 10% proactive, when it comes to making decisions. We, as an industry, tend to first notice something is broken, and then we work to fix it. Our decisions are made out of necessity most of the time.

Certainly, some decision making comes from an idea generated somewhere in the organization. However, for most organizations there is a standard way of making decisions. If you apply a little more rigor to the process than is probably formalized in our individual operations, decision making probably follows something like this:

1. Monitor the operation. Forecasters often “re-forecast” as the contact center environment changes. Often, through this process, operational changes are first noticed.

2. If there is a change, determine the likely scenario (or better yet, scenarios). The decision to “reforecast” is often a decision itself. Deciding that an operational change is worthy of a reforecast is often the equivalent to saying that the operational plan needs to be changed as well. The best organizations (not most) will look at the range of possible forecasts, and not one static forecast.

3. Develop new plans for all scenarios. From a reforecast or a new forecasting scenario, new hiring plans, staffing levels, and budgets need to be determined.

4. Make a decision. What is the new plan?

5. Repeat.

Can We Improve this Process?

Contact center analytic technologies have been available for some time to help with the various steps in this decision making process. These technologies have been developed separate of each other, and it has only recently that the computing horsepower exists to run these sophisticated modeling technologies together. But our industry now has a fair amount of experience with this comprehensive approach.

It is in this comprehensive approach that normal statistical or optimization models become “super models” able to answer strategic business questions from forecast to budget optimally in minutes. These technologies enable better decision making; but the business processes that surround them are as important as the technologies. I’ll discuss each of the technologies and the business processes together.

The Four Enterprise Analytics Business Processes:

1. Automated Forecasting and its Appropriate Role
   Most of the time, call center organizations view forecasting as a process that simply develops new handle time and volume forecasts. Any differences between forecast and actual are considered “error.”

   Leading organizations view this very differently.

   Forecast “error” doesn’t mean that the forecast analyst is wrong, instead they view error as variance to the baseline (the forecast is the baseline) and an item to be explored. Is the business environment different? Has the operation changed something? Are the mix of calls different because of some mailing?

   Similarly, the best organizations forecast — using sophisticated but common forecasting algorithms — more important metrics than just handle times and volumes. They also know that it is as important to forecast shrinkage, attrition, wage rates, etc…

2. Automated Variance Analysis

   Traditionally, forecast variance has been an exercise in budget compliance. Variance has served to crack that whip and make sure nobody spends too much.

   However, leading operations view variance as something to be investigated. What happened to cause this variance? A series of questions need to be answered:

   • Is it a mistake? Was there a math error when developing the forecast?
   • What is the root cause? What is the reason, internally (the operation) or externally (the market environment), for the variance?
   • Is this variance expected to be part of a long-term trend or is it a single event?
   • Can the operation control this variance?

   By answering these questions, variance analysis gives operations managers the best chance to develop scenarios for analyses.

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Managing Daily Staffing and Service

Continued from page 5

The following reaction strategies might be used:

- Do impromptu training
- Schedule team meetings
- Catch up on paperwork
- Make proactive outbound calls
- Offer time off without pay

Conclusion

Once the forecast is in place, staff calculations are complete, and staff schedules are assigned, there’s daily work to be done in the workforce management process. Tracking the half-hourly components of call volume, handle time, and staffing levels will provide you the information you need to communicate status and make necessary changes to ensure service goals are consistently met.

The key is having a systematic process in place to track the information so there’s sufficient time to react to make a difference for the day.

Next Steps

In this article series, we’ve covered the entire workforce management process. These steps are:

1. Forecast workload
2. Calculate staff requirements
3. Create staff schedules
4. Track call center performance

The articles have outlined the “how-to” steps of performing each phase of the process. And while all these steps can be done manually, there’s a point at which automating the process with a workforce management system is a must.

In the final article in this series, we’ll discuss workforce management automation, including qualification criteria, questions to ask the workforce management vendors, and how to budget for the process in terms of dollars and resources. Stay tuned!

Penny Reynolds is a Founding Partner of The Call Center School, a company that provides a wide range of educational offerings for call center professionals. Penny is a popular industry speaker and is the author of numerous call center management books, including Call Center Staffing: The Complete, Practical Guide to Workforce Management and Call Center Supervision: The Complete Guide for Managing Frontline Staff. She can be reached at 615-812-8410 or by email at: penny.reynolds@thecallcenterschool.com.
Calculating Trunk Requirements

In getting the optimal call center resource plan in place, there are two resources that must be calculated. The first and most important one is the number of staff, since that’s where the call center spends most of its budget. The other resource that must be determined is the number of telephone trunks needed to bring the calls into the call center. This is a critical part of the overall design of the center.

Just as in a staffing design, the first step in calculating network resources is to define workload. The same forecast of call volume used to calculate staff requirements is typically used to calculate telephone trunk requirements too. The difference in workload then, is the handle time of the contact. While an agent’s handle time is made up of ring time, delay time, and the talk time.

When there are two resources that must be calculated. The first and most important one is the number of staff, and the second is the number of telephone trunks. The number of trunks in place controls the flow of calls that will be routed to the staff and therefore has a major impact on attainment of service goals. And likewise, the number of staff in place will affect delay times in queue and trunking requirements.

Care should be taken to ensure that there are enough trunks in place to provide a good level of service to callers. It is natural to assume that a call center might over-trunk to make sure enough inbound facilities are available to callers, so that a minimal number reach a busy signal, especially since the cost of a trunk is so much less than the cost of an agent. However, adding too many trunks without corresponding additions in staff is like increasing the size of a doctor’s waiting room without adding more doctors. More people can enter the lobby (the call center queue), but everyone there will wait longer to be served. And since there are costs associated with this delay time if the call center is using toll-free services, the call center will be paying additional dollars for the longer wait time.

Calculating Trunk Requirements

The right match of staffing to trunking is essential for proper resource planning. The number of trunks in place controls the flow of calls that will be routed to the staff and therefore has a major impact on attainment of service goals. And likewise, the number of staff in place will affect delay times in queue and trunking requirements.

Care should be taken to ensure that there are enough trunks in place to provide a good level of service to callers. It is natural to assume that a call center might over-trunk to make sure enough inbound facilities are available to callers, so that a minimal number reach a busy signal, especially since the cost of a trunk is so much less than the cost of an agent. However, adding too many trunks without corresponding additions in staff is like increasing the size of a doctor’s waiting room without adding more doctors. More people can enter the lobby (the call center queue), but everyone there will wait longer to be served. And since there are costs associated with this delay time if the call center is using toll-free services, the call center will be paying additional dollars for the longer wait time.

In making the decision about how many calls to accept versus limiting the number that come into the queue, it is important to consider how important it is to capture the call or not. In a sales situation, the call center will most likely want to let every call in, since responding with a busy signal might lose a potential customer. On the other hand, where the callers represent more of a “captive audience,” it may benefit the center to allow in only the number of calls that can be handled in a reasonable amount of time with the assumption that the blocked callers will call back to be handled later.

Staffing and Trunking Relationship

Many call centers make the mistake of applying an arbitrary ratio of trunks to staff in their resource design. Some assume a one-to-one ratio and have an equivalent number of trunks to match the bodies in chairs. While this may be appropriate for some centers, it will be a mismatch for others.

Consider the two call center scenarios illustrated in the table below. Both centers have an average conversation time of 240 seconds per call and both centers answer the call after the first ring. The first call center has staffed so that average speed of answer is 30 seconds and the agents have a significant amount of after-call work (60 seconds) to complete after each call. The trunk handle time of 276 seconds is less than the staff handle time of 300 seconds per call. In this case, fewer trunks than staff would be required. More staff are needed since one-fifth of handle time is spent in after-call work, with no trunk being occupied.

Consider now the case of the second call center. It also answers calls after one ring and has an average talk time of 240 seconds. However, its agents spend only half as much time in after-call work activity. For this call center, the trunk handle time of 306 seconds is higher than the staff handle time of 270 seconds. In this scenario, more trunks than staff would be needed.

<table>
<thead>
<tr>
<th>Call Center</th>
<th>Ring</th>
<th>Delay</th>
<th>Talk</th>
<th>After-call work</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>6 sec</td>
<td>30 sec</td>
<td>240 sec</td>
<td>60 sec</td>
</tr>
<tr>
<td>B</td>
<td>6 sec</td>
<td>60 sec</td>
<td>240 sec</td>
<td>30 sec</td>
</tr>
</tbody>
</table>
Managing by the Numbers

Continued from page 8
will re-try within the same hour. In this example, 30 trunks would be needed to provide the desired service according to the Extended Erlang B model.

<table>
<thead>
<tr>
<th>Calls per Hour</th>
<th>Handle Time</th>
<th>Workload (in erlangs)</th>
<th>Number of Trunks</th>
<th>Blockage Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>200</td>
<td>360 sec</td>
<td>20</td>
<td>27</td>
<td>4.3%</td>
</tr>
<tr>
<td>200</td>
<td>360 sec</td>
<td>20</td>
<td>28</td>
<td>3.0%</td>
</tr>
<tr>
<td>200</td>
<td>360 sec</td>
<td>20</td>
<td>29</td>
<td>2.0%</td>
</tr>
<tr>
<td>200</td>
<td>360 sec</td>
<td>20</td>
<td>30</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Sometimes the duty of calculating telephone facilities falls outside the realm of the call center and is the job of the telecommunications or IT department. Even if not directly responsible for the provisioning of these resources, however, it is important for the call center to work closely with the group that has this responsibility. The number of facilities in place can affect the staffing requirements. Likewise, the call center’s staffing design will have an impact on delay times, trunk workload, and overall telephone line requirements, so the two areas should work together closely to make sure an appropriate mix of telephone resources and staff are in place.

Note: An Extended Erlang B trunking model is available as part of the Quikstaff software tool, available as a free download from The Call Center School’s web site at www.thecallcenterschool.com.

Events Calendar

Tradeshows/Conferences:

<table>
<thead>
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<th>Name</th>
<th>Date</th>
<th>Location</th>
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<tr>
<td>Quality Assurance &amp; Training Connection (QATC) Annual Conference</td>
<td>October 1-3</td>
<td>Opryland Hotel Nashville, TN</td>
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<tr>
<td>ICCM Canada</td>
<td>October 6-8</td>
<td>Metro Toronto Convention Centre Toronto, Ontario</td>
</tr>
<tr>
<td>Toronto SWPP Meet</td>
<td>October 7</td>
<td>Metro Toronto Convention Centre Toronto, Ontario</td>
</tr>
<tr>
<td>2nd Annual WFM &amp; QA Virtual Symposium</td>
<td>October 29-31</td>
<td><a href="http://www.ecrmevents.com">www.ecrmevents.com</a></td>
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Education:

Web Seminars from The Call Center School
90-minute seminars @ $300 each*  

<table>
<thead>
<tr>
<th>Seminar</th>
<th>Fall 2008</th>
<th>Winter 2009</th>
<th>Spring 2009</th>
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<tr>
<td>Data Collection and Analysis: Getting Off to the Right Start</td>
<td>Sept 5</td>
<td>Jan 30</td>
<td>May 8</td>
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<tr>
<td>Forecasting Fundamentals: Proven Practices for Predicting Call Workload</td>
<td>Sept 12</td>
<td>Feb 6</td>
<td>May 15</td>
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<tr>
<td>Calculating Call Center Staff: The Math of Call Center Staffing Tradeoffs</td>
<td>Sept 19</td>
<td>Feb 13</td>
<td>May 22</td>
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<tr>
<td>Scheduling Principles and Problems: Solutions to Scheduling Challenges</td>
<td>Sept 26</td>
<td>Feb 27</td>
<td>May 29</td>
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<td>Advanced Forecasting Techniques: Fine-Tuning Workload Predictions</td>
<td>Oct 10</td>
<td>Mar 13</td>
<td>June 12</td>
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<td>Skill-Based Routing Complexities: Traditional and Multi-Channel</td>
<td>Oct 31</td>
<td>Mar 20</td>
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<td>Performing a Workforce Management Audit</td>
<td>Mar 27</td>
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<td>Attendance and Adherence: Getting and Keeping Bodies in Seats</td>
<td>Oct 24</td>
<td>Apr 3</td>
<td>July 10</td>
</tr>
</tbody>
</table>

* Also available in e-learning format
Who says you can’t teach an old dog new tricks? While most of my charts probably fit the bill at previous jobs, my recent move to Intuit challenged me to improve my charting skills to frame the story in a way leadership was most accustomed. This article really centers on making your chart “tell the story.”

Our story is now to convey FY-09 headcount (HC) requirements by site, accounting for attrition and training classes (Figure 1).

![Figure 1](image1.png)

I’m sure I’ve used something similar to Figure 2 to convey the information to leaders but does it get the message across? Does it tell the story? Comparing Figure 2 to Figure 3, we have rid ourselves of some of the clutter but we still need to make a couple of adjustments to remove the HC requirements from the stacked column chart (in its current form) so the data is accurately displayed.

![Figure 2](image2.png)

After creating the stacked column chart (Figure 3), right click on the HC Requirements section of the stacked column and select Chart Type and then select Line Chart with markers displayed. Continue to tell your story by dressing your chart up by changing the placement of the format legend, changing colors and fill effects, and perhaps adding values to the chart as seen in Figure 4.

![Figure 3](image3.png)

Now the story is told. The requirements line and the stacked columns allow for a better visualization of our required HC and HC at each site.

![Figure 4](image4.png)

So you can teach an old dog new tricks and the membership looks forward to hearing your charting tips and tricks as well.

Mike Andrews is the Senior Contact Sales Forcaster at Intuit. Mike can be reached at michael_andrews@intuit.com or (520) 901-3000 ext 10072.
Switching From Tenured to Performance Based Scheduling

Continued from page 1

Ten hour, 4 days a week with a fixed start time. Variety of start times, with the additional day off either on a Wednesday, Thursday, or Friday.

Variable eight hour, 5 days a week. Three different types: first has a start time that can range from 7:00 am to 8:00 am, second has a start time that can range from 7:30 am to 8:30 am, and the third has a start time that can range from 8:00 am to 9:30 am. The start time varies from day to day.

Nine hour, 4 day a week, and one four hour day, with a fixed start time. Variety of start times, with the additional half day off on either Wednesday, Thursday, or Friday.

Standard eight hour, 5 days a week, with a fixed start time.

The shifts continue to evolve with each new bid, taking into account feedback from staff and management.

Four months prior to the switch, training was provided to staff on how to use the WFM software to bid on the available shifts. The training also provided detailed information on how their performance score was calculated. We felt this was important information that we needed to provide to staff, in order for successful implementation. There were many questions and discussions around the scoring process. We also set up a time table so staff were fully aware of which results were used for each bid.

<table>
<thead>
<tr>
<th>Performance Data</th>
<th>Shift Bid</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd quarter 2006</td>
<td>1st quarter 2007</td>
</tr>
<tr>
<td>4th quarter 2006</td>
<td>2nd quarter 2007</td>
</tr>
<tr>
<td>1st quarter 2007</td>
<td>3rd quarter 2007</td>
</tr>
<tr>
<td>2nd quarter 2007</td>
<td>4th quarter 2007</td>
</tr>
</tbody>
</table>

The gap between the performance data dates and the shift bid dates were due to the amount of time it takes to create each shift bid, and the expectation to give staff members a one month notice of their new schedule.

The Results

Throughout the process, turnover increased significantly as expected. However, things quickly returned to normal after the first bid. The highest turnover happened very early in the process, long before the first bid took place. Staff’s fear of change drove the initial turnover, which caught us off guard a bit. We were expecting the highest turnover to be after the first bid, if staff didn’t receive their choice of shift.

That first bid resulted in over 70% of staff receiving one of their first three shift choices. This eased management’s concerns with the shift bid process, since so many staff received one of their top choices. Comments from staff have been mainly positive, as many staff who never had a chance at an early start time, now have the opportunity to receive these types of shifts. Of course, there are still those staff who voice their concerns with the process, indicating that seniority should count for something, but for the most part the comments are generally in favor of the process. We continue to encourage staff feedback and make adjustments to the process and shifts as staff and management become more and more comfortable with the process.

We’ve since implemented the process in our other two centers and have achieved a 4% increase in our productivity measurement and a 3% increase in our adherence results. This was a huge accomplishment for our centers, resulting in a large decrease in expenses.

Recommendations

Communication and employee involvement are key to successful implementation of Performance-Based Scheduling. Don’t rush into it. Give yourself plenty of time to communicate and educate everyone on the process. Include the reasoning behind the change. You’ll also want to make sure staff are able to review their scores and rankings at any time, in order to let them know where they stand, as well as give them the opportunity to improve their scores.

SWPP Member Ray Lindley, CWPP, serves as Business Analyst II for Principal Financial Group. He may be reached at lindley.ray@principal.com.
Question: Have you heard of organizations that have started to use something called "demand" (calls answered + 30% abandoned) as their input into their workforce management system for forecasting? I have recently heard of this and was wondering if it was a new trend in the industry. The reason given for using demand as opposed to offered calls is because of the fact that people often dial the number several times before getting through to an agent and this obviously inflates the offered call stats.

My theory is that if you staff to your offered calls then you would have the correct number of staff to begin with therefore abandon rates would not be very high anyway. The theory behind this is that if there is a large abandon percentage because they only have a limited pool of staff and the staff are unable to answer the calls, then they get penalized as forecasters even though a lot of the offered calls are callers who have already tried to get through once or twice before. I just wondered if you were coming across this elsewhere…

Answer: We've seen this or similar approaches when the staffing is known to be inadequate and a significant abandon rate develops. Repeat callers show up as additional offered calls, but they don't want to use 100% of the abandonment rate because these also include repeat callers. So handled calls plus some estimate of the number of abandoned calls that represent true new callers is a way to take this into account. The only accurate way we have found to determine the true demand of new callers is to open the door and let them in — have enough staff to allow them to be answered. So an estimate is sometimes the only way to go.

If you use the offered call numbers during these high abandonment periods as the true demand, then you will probably overstate the work and staff required because of the repeat caller behavior. This would include the multiple attempts by single callers. If the forecasters are being held to a measurement of forecast accuracy, then they need some kind of in-between number that represents true demand since offered is probably overstated, handled plus all abandons is also overstated, and handled only is understated.

It is sad that companies would take the view that allowing this unmet demand to happen on a long-term basis is a good business decision. But if this is really just a reaction to a temporary situation or crisis mode operation, then it is reasonable. We have also seen a throttle put on the front end so that when the staff capacity is reached, all new callers are turned away with a busy signal through trunk limitations or "maximum calls allowed" controls. It has the same effect of turning callers away but does so quickly without the company incurring the cost of the caller sitting in the queue on the toll-free number for a long time, and it is often less annoying to the customer than long hold times as well. In this case, the demand for forecasting becomes the offered calls that reach the ACD plus some percentage of the busy signals. Once again it is a guess at best.

There is a new technology that addresses this. It informs callers in the queue that the hold time is long and asks if they would like to hang up and get a call back when their turn comes around and asks the caller to dial in the number for the call back. They retain their place in queue but the caller doesn't have to keep listening to the music and announcements. When their turn is near, the ACD dials out to the caller, gets them back into the queue at the front of the line, and the next available agent takes that call. Callers who would rather hang on certainly have that option too. Many callers report that they prefer the call back as they can get on with other tasks while waiting. And the connect rate on the call backs is in the high 90% range unless the wait is extremely long. Another benefit is a lower toll-free calling cost as these callers aren't on hold.

It is also important to understand what this overload does to the call arrival patterns. It flattens the pattern at the peaks since there is no more capacity to let anyone else in, and it fills up what would have been valleys with the repeat callers. So a relatively flat pattern across the day develops compared to the more variable pattern of the actual new call arrivals. Once again, this will be stored in the workforce management system since that is what the ACD is reporting and the percent of abandons added may need to vary by time of day to make it more realistic as well. This is really a case of "oh what a tangled web we weave...."

Have a tough question?
Send it to wizard@swpp.org and we'll try to find an answer!
Vast Contact Operation with TotalView

Aditya Birla Minacs Brings Order to Vast Contact Operation with TotalView

Aditya Birla Minacs operates a large, international business and knowledge processing outsourcing operation with some 10,000 agents stationed at contact centers around the globe. To keep the growth of that business healthy, and reduce overall costs, the company turned to IEX TotalView and WebStation Plus to overcome several key inefficiencies in workforce management and planning, and enterprise-wide has freed up well over 100,000 hours of agent and management productivity.

Before TotalView, Minacs lacked consistency in its WFM processes. Each contact center used individualized and heavily manual processes to schedule agents and manage exceptions. Managing the operation as a truly integrated whole was impossible, as each site had its own rules, and different agent pools and sites could not easily be compared to one another. Because one client might be served by multiple Minacs locations, customers began noticing the inconsistencies as well, leading to a push for change.

“The IEX TotalView system provided the centralized platform for optimizing our KPIs, allowing us more accuracy in forecasting and scheduling,” says Shahab Baksh, global director of business excellence at Aditya Birla Minacs. “Now, we do not have to rely on spreadsheets and time-consuming cut-and-paste operations.”

Previously, virtually all of the analysis at Minacs was done on a manual, ad hoc basis. “We had no way of knowing which activities were being completed other than those defined by the limited reason codes, and all of our adherence information was tracked manually in spreadsheets,” Baksh says. Now, managers and supervisors have access to real-time adherence and performance data, including agent-by-agent snapshots, absentee information, and intraday KPIs. Minacs uses intraday reporting to adjust contact expectations for the remainder of the day and better meet FTE budget requirements.

Instead of bidding for schedules with manually constructed spreadsheets, agents now use the effective and intuitive WebStation interface, which puts all agents on a level playing field and gives them a consistent view of all available schedule options and final assignments. Agents receive schedule notifications with two weeks of lead time, a marked improvement over the manual process. Agents can manage their own schedule trades through WebStation, rather than working through a WFM specialist, which created a delay of at least 48 hours. Minacs estimates that the automated Schedule Bidding alone created nearly 500 additional hours of agent productivity each bidding period, while exception management through WebStation saves over 123,000 hours per year.

With TotalView’s powerful forecasting capabilities, Minacs enjoys automatically-generated long- and short-term forecasts which account for seasonal, annual, and week-to-week changes in observed call volumes, as well as special scheduling needs defined by management. Significant changes to the workforce makeup can be simulated and reported on in as little as an hour. “Not having to manage this data via spreadsheets offers huge time savings in work hours,” Baksh says.

With over 10,000 agents, even a low absenteeism rate can create a lot of extra work for workforce management specialists. Minacs introduced a TotalView-integrated IVR to help manage sick calls, and in conjunction with WebStation the company saves 231 hours per week on absentee processing.

Because of its WFM overhaul, Minacs has been able to redefine the roles of many of its workforce specialists. Analysts who in the past were relegated to processing the countless manual spreadsheets are now in strategic planning roles, devising and optimizing forecasts and conducting gap analyses. Specialists who created manual real-time reports now work with TotalView’s automated real-time reporting, generating and executing on recommendations for staffing deviations based on real-time observations. Thanks to TotalView’s integration with Kronos, Minacs can now use its payroll specialists more productively. Rather than poring over spreadsheets, these time-and-attendance analysts reconcile paid and scheduled hours and monitor payroll data for trends and anomalies.

With TotalView and WebStation Plus, Aditya Birla Minacs has streamlined its workforce planning and management tasks, standardized the forecasting, scheduling, and payroll aspects of its contact center, and reduced costs while boosting the bottom line. “Managing the workforce properly is key to being able to grow profitably,” Baksh says.
WFM Survey Results

Continued from page 2

Length of Time to Work in Center

The largest percentage (37%) said that agents must work in the call center one year or more before they are allowed to work from home. An interesting statistic here was that 25% said that new hires are eligible to work at home.

Pay for Remote Agents

The overwhelming majority (92%) here said that the pay is the same for both remote agents and in-house agents. Seven percent said remote agents receive decreased pay, and one percent said remote agents receive increased pay.

In the 2006 Survey, 23% of the participants said new hires were eligible to work at home.

Percentage of Time Required to Spend in Center

Another interesting statistic here: forty-seven percent said that their remote agents do not have to spend any time in the call center on a monthly basis. Thirty percent said agents must spend less than 5% of their time in the center, while 13% said they must spend 5-10% of their time in the center.

Benefits for Remote Agents

Again, the majority (89%) here said that the benefits are the same for both remote agents and in-house agents. Seven percent said remote agents are not eligible for benefits, and four percent said remote agents are only eligible for reduced benefits.

In the 2006 survey, 37% of the respondents in 2006 said remote agents did not have to spend any time in the center.

Coaching Techniques Used for Remote Agents

Telephone calls were the most popular answer when participants were asked what coaching techniques were used for remote agents, followed by e-mail, web chat/instant messaging, a requirement to come to the center, then a visit to the agent’s home office.

The largest percentage in the 2006 survey was 38% that said they used telephone calls to agents for coaching. In that survey, only six percent used e-mail for coaching.

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Pipkins Debuts Industry-First Tools for Online Agent Scheduling

St. Louis, MO — Pipkins Inc., introduced a series of industry-first upgrades to the WAVE online agent schedule viewing and modification module of its Vantage Point workforce management system for call centers. The new tools extend self-service Web-based scheduling capabilities to overtime planning, availability planning, pickup hours assignment and shift bidding for the first time, further reducing schedule-related overhead and making WAVE the most advanced online agent scheduling program in the market.

“These newest enhancements to our WAVE module add to our long list of industry firsts. We now offer the first automated overtime planner, the first automated shift bid manager, and so on,” said Jim Hogan, Manager of Customer Care for Pipkins. “These new automation abilities save time, reduce scheduling errors, increase the self-service features available to agents, and add important incremental efficiencies to call center operations.”

New Release of InVision Enterprise WFM Boosts Ease of Use and Saves Time – in Contact Centres and Beyond

Birmingham, United Kingdom — At this year’s Call Centre Expo, InVision Software, a world-leading supplier of solutions for enterprise-wide workforce management (WFM), presented the new release of its software solution InVision Enterprise WFM. In addition to the new modules HolidayManager and JobProcessor, version 4.6.0 offers fully integrated time & attendance functions and enhancements to many areas of the product which make the software tool for optimised employee scheduling even more powerful and user-friendly. On the second day of the show, in the Call Centre Technology Theatre, InVision demonstrated how to apply the tools and techniques of workforce management beyond the realm of inbound and outbound call centres and optimise staff scheduling right across the enterprise.

Visitors to InVision’s stand found out first-hand about the new features of release 4.6.0 of InVision Enterprise WFM. The integrated time & attendance functionality of the solution enables users to reduce payroll errors and save operating costs by automatically checking agent time records against schedules, highlighting anomalies and applying rounding rules before exporting time records to Payroll. Recorded working times are allocated to the right time accounts, e.g. for overtime, special shifts, holidays or normal working hours. InVision Enterprise WFM is unique in providing full time & attendance functionality in a WFM tool which is proven in the contact centre market.

S1 Enterprise and Verint Systems Announce Partnership to Aid Financial Institutions in Workforce Optimization

Norcross, Georgia and Melville, NY — S1 Enterprise, a division of S1 Corporation (Nasdaq: SONE) and a leading provider of multichannel financial services software, and Verint Systems Inc. announced a partnership agreement. Under the terms of the agreement, S1 Enterprise will offer the Verint® Witness Actionable Solutions™ Impact 360® Workforce Optimization capabilities as part of its S1 Teller, S1 Sales & Service and S1 Call Center application suite.

“Staffing needs in branches and call centers ebb and flow based on the day of the week, seasonal fluctuations, current promotions and other factors,” said Darryl Demos, senior vice president and general manager, Verint Witness Actionable Solutions’ enterprise solutions group. “The detailed data collected by the S1 Enterprise applications, along with our robust enterprise workforce optimization solutions, make it possible for branch and call center managers to forecast staffing requirements, especially as they relate to service-level goals.”

PerformanceEdge from Aspect Software Offers Enhanced eLearning and Hiring Capabilities to Improve Agent Development and Reduce Attrition

Chelmsford, MA — The PerformanceEdge Group of Aspect Software, the world’s largest company solely focused on Unified Communications for the Contact Center™, announced that it will be offering PerformanceEdge™ eLearning and PerformanceEdge Job Match, which enables contact centers to improve agent recruitment, retention, and training processes along with overall contact center productivity. With these new eLearning and hiring capabilities, PerformanceEdge provides customers the most complete depth and breadth of contact center performance optimization capabilities on the market. The capability is provided through a partnership with Knowlagent, the leading provider of on-demand call center agent performance improvement tools.

PerformanceEdge eLearning is designed to improve training and coaching by delivering the right content at the right time to agents and supervisors. PerformanceEdge Job Match is a Web-based job screening application specifically designed for the call center that helps companies assess candidates against the critical job requirements and provides them with the opportunity to assess their own fit. The result is fewer “false starts,” therefore reducing attrition and improving overall performance.
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Become a part of an organization designed specifically to facilitate professional development of workforce planning professionals. SWPP provides its membership with a variety of benefits, including this quarterly newsletter, regional networking meetings, online forums, an annual conference, and more.

Membership in SWPP is available to anyone in the workforce planning or related profession.

There are three distinct levels of membership in SWPP: individual/associate membership, site membership, and corporate membership. One of these memberships is right for you! Membership costs vary with the type of membership. Prices for each membership are as follows:

- Individual/Associate Membership $295 USD
- Site Membership (up to 3 members) $595 USD
- Corporate Membership (unlimited number of members) $4995 USD

Membership applications are available on the web at www.swpp.org. Still have more questions? Call us at 877-289-0004 or email us at info@swpp.org. We’d love to hear from you!

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