

The State of Intraday Workforce Management in Today's Contact Centers



An **ICMI** Research Executive Summary

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CONTENTS

Introduction	3
The Challenges of Existing Workforce Management Programs.....	4
An Actionable Approach to Workforce Management	6
Implementing Intraday Strategies	9
Conclusion	11
About the Study	12
About the Sponsors.....	13

INTRODUCTION

Contact centers go to great lengths to plan and prepare for every single day of operation. The nuanced and complex function of workforce management (WFM) lays the foundation for accurately predicting workload and ensuring the right number of agents and resources are in the right place, at the right time. Much of this planning must happen in advance, but the techniques and strategies utilized “in the day” should not be undervalued or overlooked, either. Virtually every contact center produces some type of WFM plan, but how many take the necessary steps to ensure that it’s as accurate as possible?

NICE and ICMI partnered to explore the practices and techniques contact centers are using to adjust and refine WFM through intraday planning and management. This report reveals the results of that study and provides contact center leaders with best practices and insights for maximizing the impact and effectiveness of WFM teams.

“In preparing for battle I have always found that plans are useless, but planning is indispensable.”
— Dwight D. Eisenhower

If you’ve spent any time in an inbound contact center, you know that things never go exactly as planned. Volume and arrival patterns are inconsistent, agent behavior can be unpredictable, and unplanned events can derail even the smoothest of operations on the best of days. None of that is to say that WFM is useless. However, contact centers have great opportunity to improve the accuracy of WFM by evolving their approach to planning and intraday management.

This report shares the state of intraday WFM and planning in the contact center. It is intended to equip contact center leaders with business intelligence and market data to consider when evaluating or evolving their own intraday WFM practices.

KEY FINDINGS

- **One out of four** contact centers measure forecast accuracy at half-hour intervals
- **70%** of contact centers manually adjust intraday WFM
- Each week, the average contact center commits **seven hours** of manual work to PTO- and shift-change-related requests
- Just **12%** of respondents strongly agree that their reforecasting process is effective at closing the gap between their current and goal staffing requirements
- **Less than one-third** of respondents are very or extremely satisfied with their existing scheduling process
- **37%** of contact centers are experiencing an increase in agent turnover

THE CHALLENGES OF EXISTING WORKFORCE MANAGEMENT PROGRAMS

While the primary purpose of this study was to understand intraday management practices and techniques, there was an introductory line of questioning to capture a baseline understanding of the respondents' workforce management (WFM) programs. These findings indicate areas of responsibility, types of technologies used, and the factors that contribute to forecasting inaccuracies.

Which of the following roles are in charge of scheduling in your contact center?

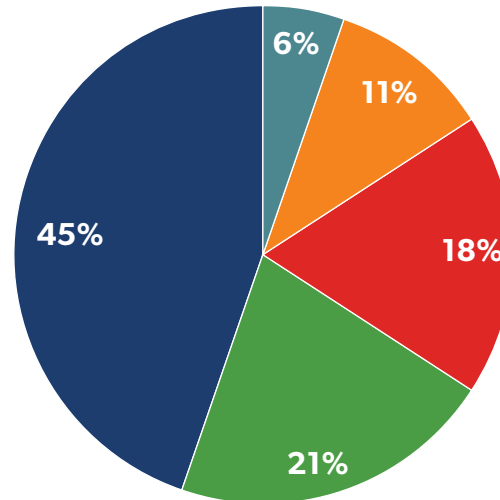
Workforce manager/team whose primary responsibility is scheduling **75%**

Contact center manager(s) **24%**

Contact center supervisor(s) **13%**

The majority of contact centers have a dedicated workforce manager or team that's responsible for scheduling. However, the smaller the contact center is, the more likely it is that the WFM function and scheduling is the responsibility of the contact center manager or supervisor(s). These smaller contact centers (<100) are also more likely to be using an Excel/spreadsheet-based WFM solution or no WFM solution at all, while the larger contact centers (5,000+) are most likely to have an on-premises WFM solution.

Which of the following best describes your current WFM solution?

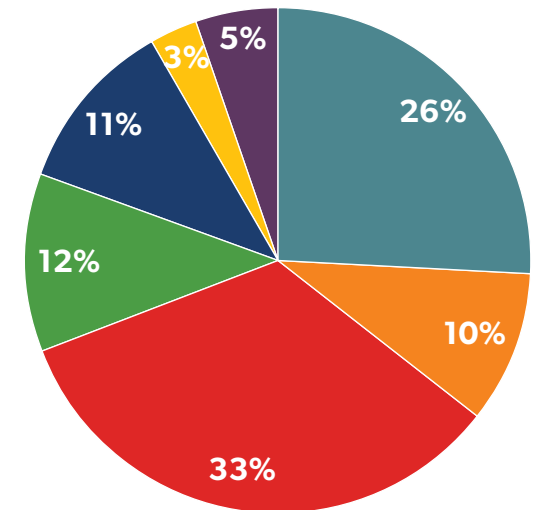


- We don't use a WFM solution
- Hybrid of on-premises and cloud-based WFM software
- Excel/spreadsheet-based
- Cloud-based WFM software
- On-premises WFM software

One of the most surprising findings relates to forecast accuracy: just one out of every four respondents measure forecast accuracy down to half-hour intervals. A handful of respondents indicated that they don't measure forecast accuracy at all! By measuring forecast accuracy at larger intervals, contact centers significantly limit their abilities to base their schedules on demand or understand their areas of greatest

need. One of the first steps that contact center leaders can take to create a more accurate forecast is to measure their accuracy down to the half-hour level.

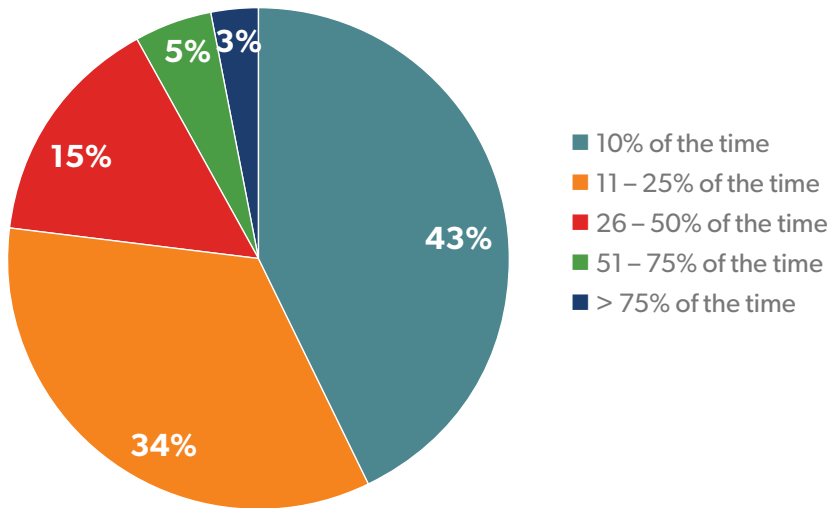
How frequently do you measure forecast accuracy?



- Half-hourly
- Hourly
- Daily
- Weekly
- Monthly
- Annually
- Other

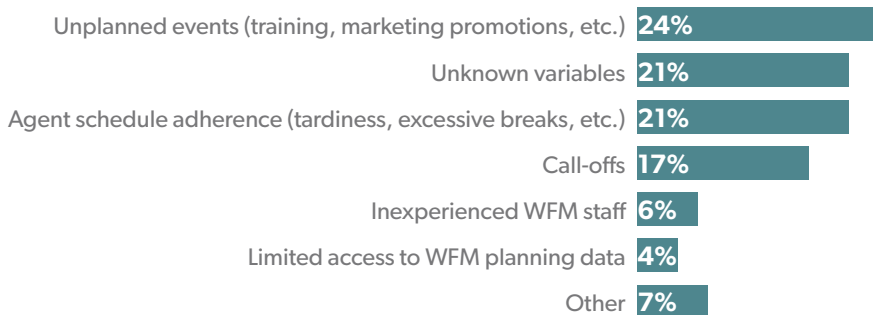
With so few contact centers measuring forecast accuracy at an actionable level, it was not surprising to discovery that many contact centers struggle with forecast inaccuracy. Even more disquieting is the realization that the moment-by-moment experience in these contact centers could have the accuracy off by exponentially greater amounts.

How often is your forecast off by more than 5%?



When asked about the most common causes of an inaccurate forecast, respondents indicated that most of their forecasting challenges are the result of unknown or unplanned events. An additional factor that commonly affects forecast accuracy is agent schedule adherence.

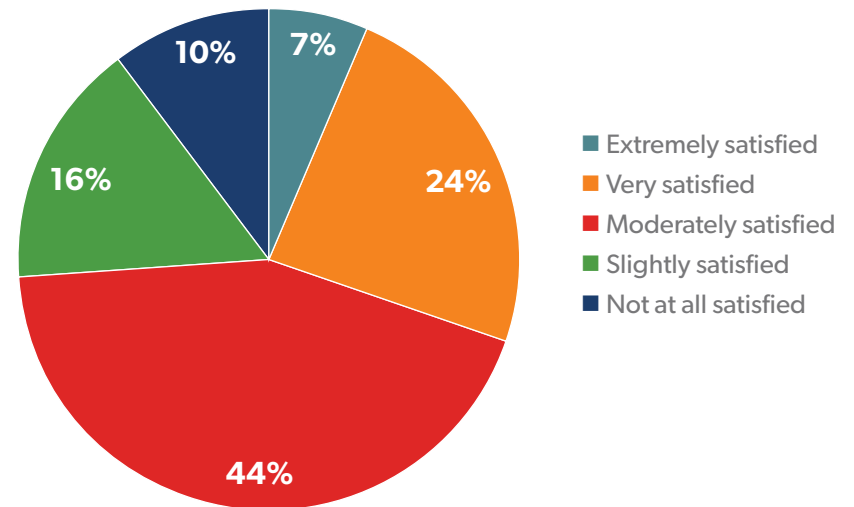
What is the most common cause of an inaccurate forecast in your contact center?



These findings indicate two clear needs for contact centers that wish to get a better return on their WFM program:

1. A more actionable approach to data collection and reporting
2. An intraday WFM strategy that effectively addresses the gaps between forecasted and actual contact volumes

And, based on additional findings from this research, most contact center leaders would like to see some improvements – especially with regard to the scheduling process. Less than one-third of respondents stated that they were very or extremely satisfied with their contact center’s scheduling process.



WFM isn’t something that can be overlooked if it’s ineffective and delivering unsatisfactory results. As the rest of this research reveals, there are countless opportunities for contact center leaders to dial in their approach to WFM and refine their processes to deliver better outcomes.

AN ACTIONABLE APPROACH TO WORKFORCE MANAGEMENT

Contact centers with the most effective planning processes consistently follow nine steps:

- > **STEP 1** Establish Accessibility Objective

- > **STEP 2** Collect Data

- > **STEP 3** Forecast the Call Load

- > **STEP 4** Calculate Base Staff

- > **STEP 5** Calculate System Resources

- > **STEP 6** Calculate Rostered Staff Factor

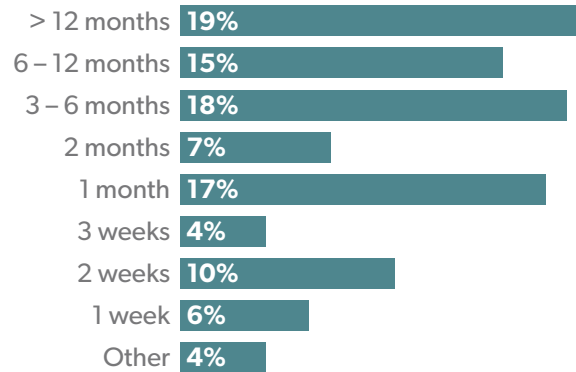
- > **STEP 7** Organize Schedules

- > **STEP 8** Calculate Costs

- > **STEP 9** Repeat for Higher and Lower Levels of Service

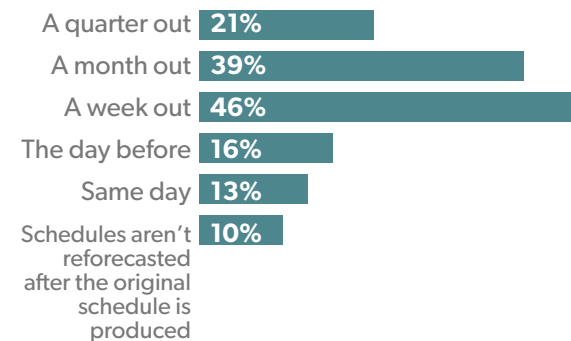
At each step, workforce managers blend art and science as they consider historical patterns and trends and factor in known future events (such as marketing campaigns) and predicted future variables. For 19% of contact centers, this initial forecast and scheduling process begins one year or more in advance. While there isn't an exact rule on when an initial forecast should be created, a forecast that is created a year or further away from the day of should most definitely go through a reforecasting and revision process much closer to the date of the schedule.

How far in advance do you produce your contact center's initial forecast and staffing schedule?



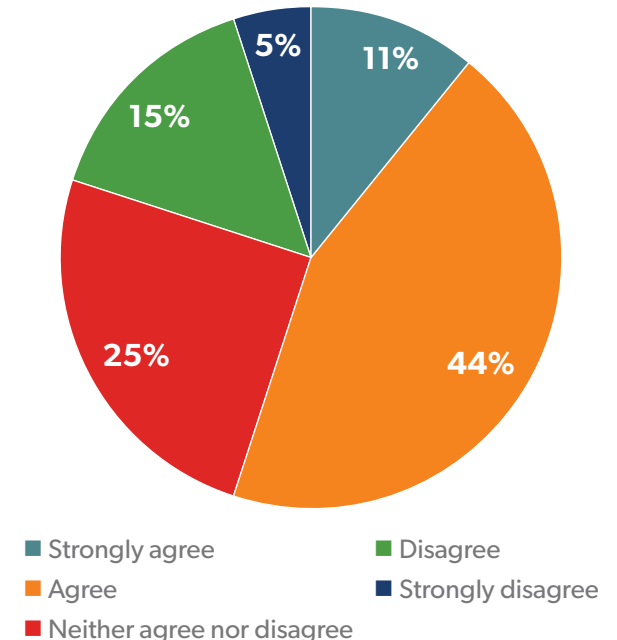
If contact center leaders want to have the most accurate version of a forecast or schedule, a reforecasting process should even occur for the 36% that produce their schedule between one week and one month prior. Despite that, the majority of contact centers won't reforecast once they're within a week of the schedule.

How far out will you reforecast a schedule?



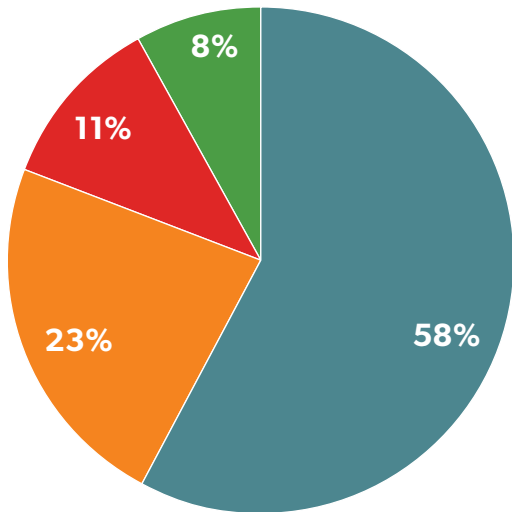
The intent of reforecasting is to narrow the gap between the original prediction of volume and staffing requirements and the realities of the actual need. Contact centers are inherently charged with the task of providing service by the most efficient and effective means possible and, if the forecast is grossly incorrect, contact centers risk wasting resources or falling short of customer expectations and jeopardizing revenue and customer loyalty. Most workforce managers understand this, but as our research uncovered, 45% don't believe that their current reforecasting process is effective.

Your current reforecasting process is effective at improving the gap between your net and goal staffing requirements.



At the heart of ineffective processes and dissatisfaction is an incredible amount of unnecessarily manual work. It all begins with the ways in which organizations handle paid time-off, schedule changes, and unplanned absences.

How does your contact center handle agent PTO (paid time-off) requests?



- Submitted directly by agent into the WFM system
- Manually submitted through email/note to agents' direct supervisor/manager
- Manually submitted through email/note from agent to workforce manager
- Other

While it was encouraging to see that over half of the respondents' contact centers enable their agents to directly submit PTO requests into the workforce management (WFM) system, the 42% that have a manual process in place are adding hours of work to their workforce managers' plates and increasing the likelihood of human error during the scheduling or reforecasting process.

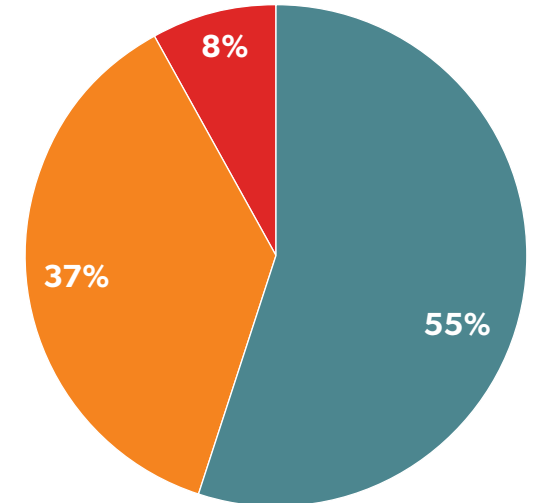
When requesting a schedule change, are agents in your contact center responsible for finding someone to take their shift(s)?



Unsurprisingly, however, the majority of contact centers make their agents responsible for finding their own shift coverage. Again, this opens the door to a series of avoidable risks, including agents who are unable to find coverage but take off regardless, agents who accept shifts and go into overtime when it's not permitted, or agents who find coverage but miscommunicate the details and cause a shift to be missed or overstaffed. All of these situations create more work for management and affect the customer experience.

When surveyed on how agents find shift coverage, more manual work was revealed.

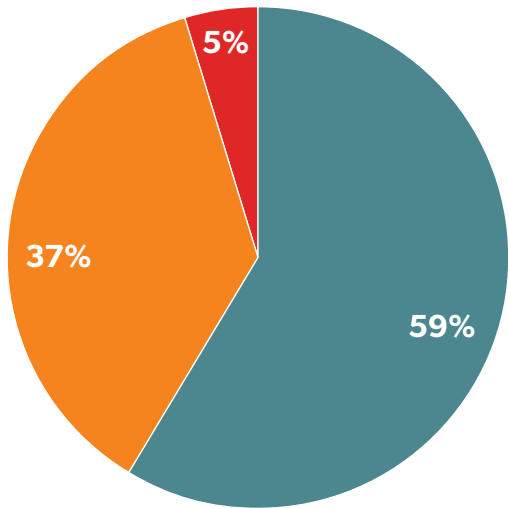
How do agents secure shift coverage?



- Manually contact all agents to request coverage
- Automated through rules-based WFM tool
- Other

Because so many contact centers risk the negative consequences of having too many manual moving parts, it requires them to manage and mitigate the risks through a manual review process. Over 60% don't rely on a technology with rules-based automation; they have to do the work manually.

How does your contact center manage schedule swaps/shift coverage requests?



- Manually – all swaps/requests must be reviewed to prevent overtime, gaps in coverage, etc.
- Automated through rules-based WFM tool
- Other

In total, respondents spend an average of SEVEN hours each week reviewing PTO and shift-change requests.

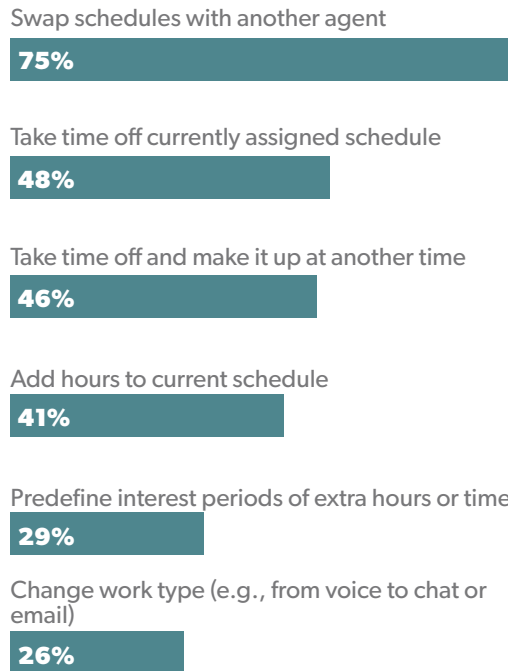
The average contact center invests thousands of dollars a year in manually reviewing information that could be easily automated. This automation would result in both cost savings and an increase in the accuracy of the data captured. In addition, the implementation of such a system would enable agents to have greater control and involvement in the scheduling process in a way that could increase engagement and empowerment.

Does your company have a strategic initiative to improve agent empowerment?



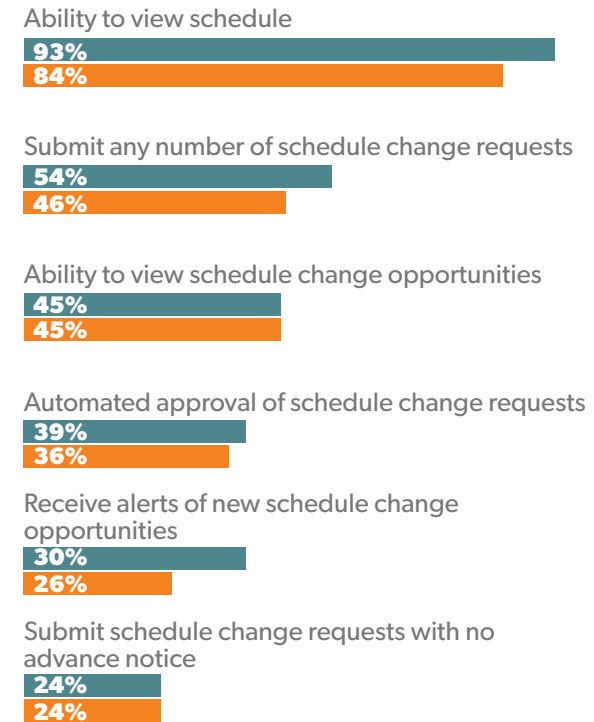
While the majority of contact centers have a strategic initiative in place to improve agent empowerment, they may not have considered empowering agents through the scheduling process. In fact, this study found that while most contact centers enable agents to swap schedules, they aren't able to do much else.

What agent empowerment options does your company offer?



Additionally, agents are extremely limited on the schedule change features that they can interact with, both at work and home.

Which of the following schedule-change features are agents empowered with while at work/at home?

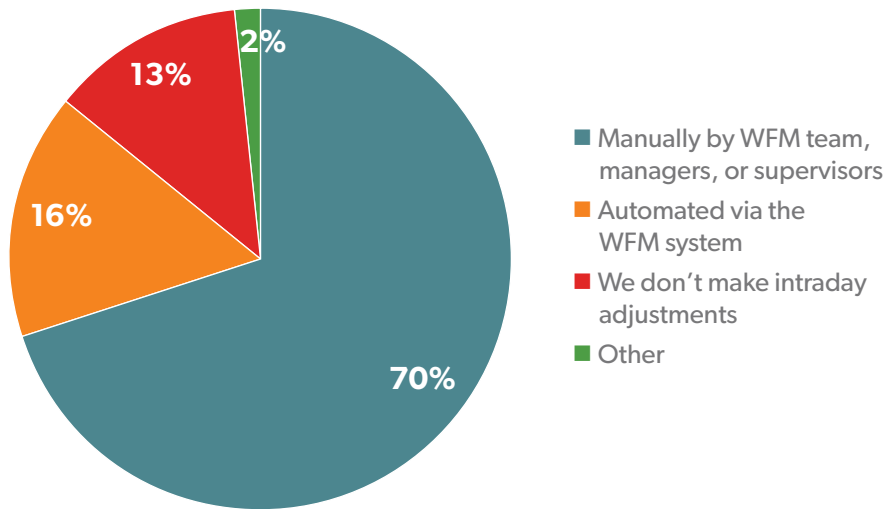


By empowering agents with these types of capabilities, contact center leaders wouldn't just be involving their frontline teams more – they'd also be moving work off of their own plates. With the right technology and the right strategy, organizations can quickly see drastic improvements from their WFM programs. Furthermore, it paves the way for more effective intraday WFM.

IMPLEMENTING INTRADAY STRATEGIES

Intraday workforce management (WFM) is happening in most contact centers (87%). Unfortunately for most, however, these intraday adjustments are enacted manually, by the WFM team, managers, or supervisors.

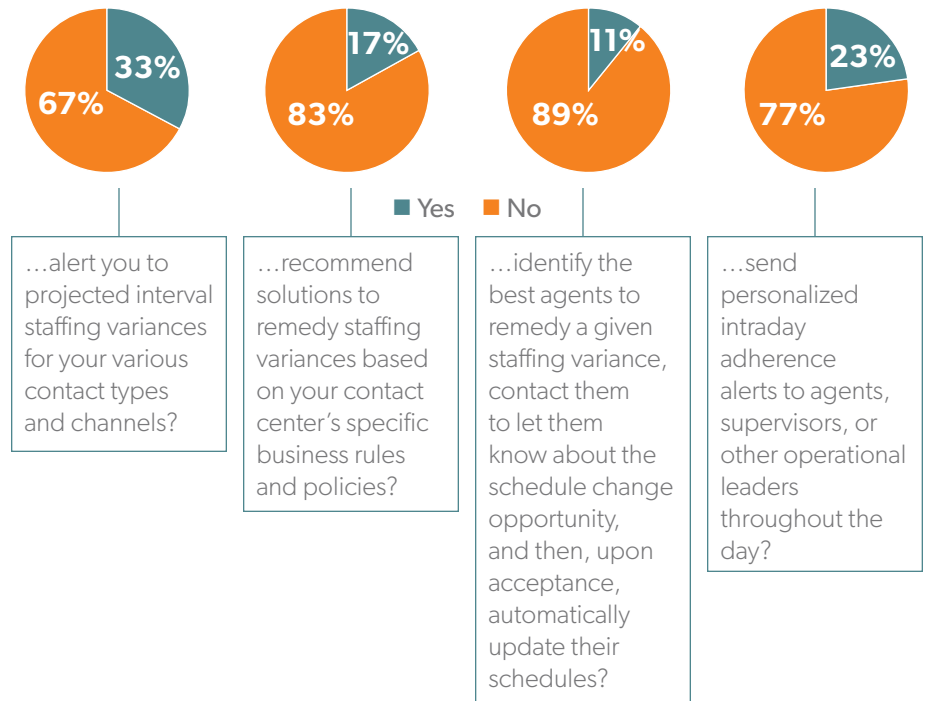
How is intraday WFM handled in your contact center?



Of the 13% of contact centers that don't currently conduct intraday WFM, one-third plan to incorporate it within the next 12 months.

One of the challenges with these existing systems is that they're not intuitive enough to make recommendations on schedule improvements or automate manual tasks. In other words, ineffective WFM prevents contact centers from being as effective as they could be, resulting in lost productivity and low morale.

Does your WFM system automatically...



In every situation, the majority of survey respondents indicated that they don't get recommendations based on business rules, they can't automatically identify the best fit agents for a given need, and they're not receiving the alerts and reporting that they need the most. When asked to rank the most important intraday process and performance management capabilities, respondents had some clear thoughts on what mattered most.

The most important intraday management process capabilities:

1

Customer queues are management based on agent performance and skills

2

Sudden changes in customer traffic are handled through agile agent scheduling

3

Agents are assigned to deliver multichannel support

The most important intraday management performance capabilities:

1

Customer feedback data used to measure agent performance

2

Automatic monitoring of calls to help struggling agents

3

Integrate quality assurance activities with agent performance management efforts

Contact centers may recognize the need for new systems, but there's something holding them back: cost!

What is the greatest determining factor in whether or not your organization would invest in an intraday WFM system?



While it's not at all uncommon for the gut response to be cost, it's imperative that contact center leaders look beyond the initial investment. Contact centers could easily be committing the same amount or more each year to lost productivity or excess staffing costs. That's one of the key benefits of implementing a more effective intraday system: it improves agent and management productivity. Anecdotally, when asked which metric had been most positively affected by the use of intraday management, respondents indicated that it was agent productivity. What they're probably thinking, however, is that this improvement in agent productivity is coming at the cost of lost leadership productivity in many of the existing intraday WFM models. It's just not a sustainable approach and it's no surprise that so many are unsatisfied with their current results.

CONCLUSION

With advancements in technology that free contact center leaders and frontline employees from the mountains of manual work associated with intraday workforce management, people will increasingly expect tools and resources that respect their time and free them to do the work that matters most. Our people are our most valuable resource and, if we're not equipping them to do the best possible job, they will take their skills and go somewhere that will. It's in the best interest of contact centers to make the change before a sea of growing discontentment and increased resentment trigger a cascading negative impact across their organizations.

A workforce management plan is an indispensable part of contact center operations. However, unless organizations take a new approach to intraday management, they may find that their forecast and schedules grow increasingly useless. In an era where customers have a variety of options for contacting a company, the news of unplanned events can spread virally in a matter of seconds. A nimble approach to WFM, including effective intraday management, is essential.

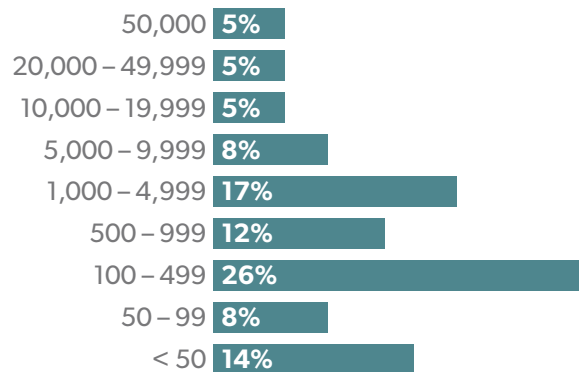


ABOUT THE STUDY

The 597 respondents to this survey represented a range of industries, with the largest representative group being financial services (banking, insurance, accounting, and real estate) at 28%. The next largest group of responses came from healthcare (9%), retail (9%), and customer support providers (8%). The study participants represented all roles within the contact center including executive/senior management (21%), specialist or mid-level management (51%), and supervisors (10%).

With regard to the size of their contact centers, almost half of the respondents (48%) represent contact centers with fewer than 500 full-time employees (FTEs), while the second largest population of responses came from contact centers with 1,000 – 4,999 FTEs.

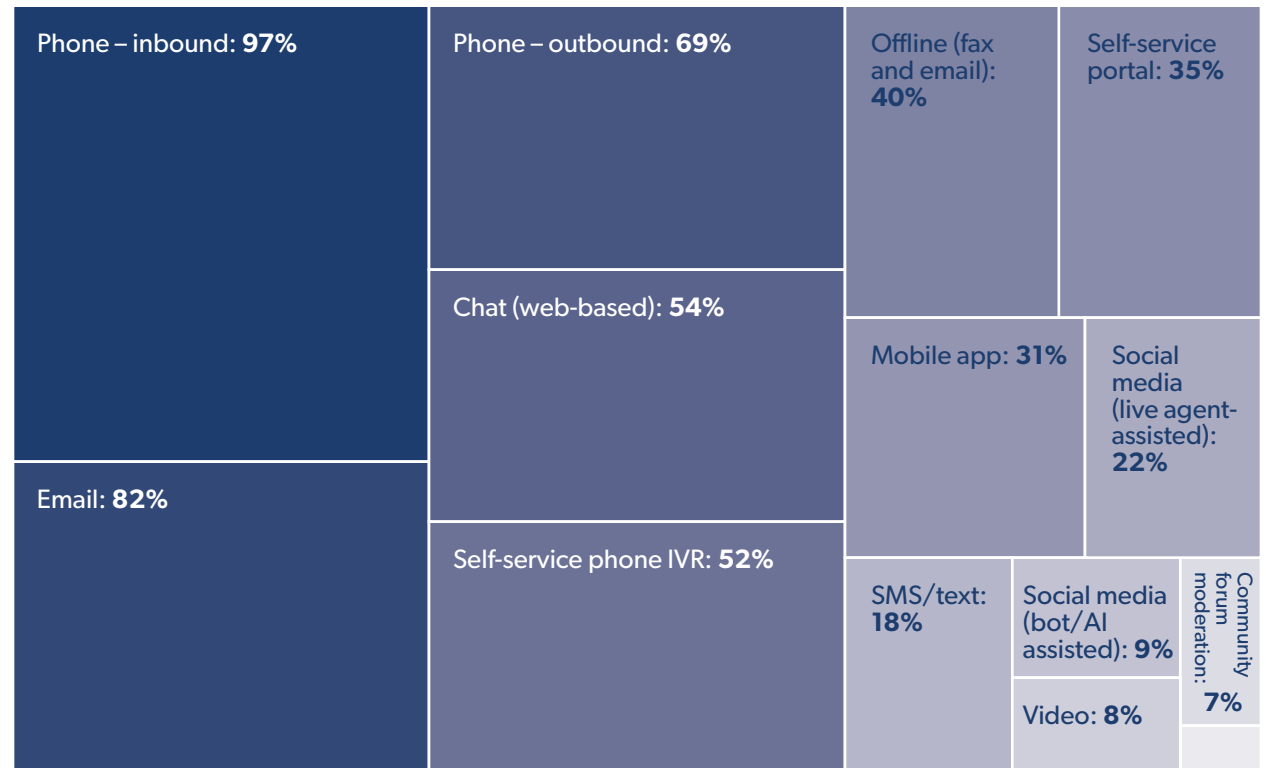
How many full-time employees (FTEs) work in the contact center(s) in your entire organization?



The majority of respondents are responsible for customer service (73%), with just under one-third involved in technical support (30%) and one-fifth working with sales (20%). Geographically, this study is representative of organizations that are predominantly based in the United States (92%) and Canada (4%).

Contact centers in this study support a wide assortment of channels, with more than 50% offering more than five different channels of service.

Which of the following channels does your contact center support today?



ABOUT ICMI

ICMI is the leading global provider of comprehensive resources for customer management professionals—from frontline agents to executives—who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations, and improve your customer service. ICMI is a part of UBM plc (ubm.com), a global events-led marketing services and communications company.

ABOUT NICE

NICE, the vanguard for workforce management innovation, recognizes the constantly changing demands facing the modern organization. Our solutions offer a robust feature set designed to meet the up-to-the-minute industry developments discussed in this report, including advanced task automation in back-office WFM, branch solutions for brick- and-mortar locations, and employee engagement resources. NICE's automated decisioning tools have been custom-built to reduce time spent on manual intraday management processes and improve work-life balance for agents through self-managed scheduling and personal empowerment. We invite our current customers and anyone interested in optimizing their workforce to take a closer look at NICE's offerings, including NICE WFM, NICE EVOLVE WFM and NICE EVOLVE Branch WFM, to find the solution that best fits their needs.