



Buyer's Guide to Workforce Management

How to choose the right WFM
solution for your contact center

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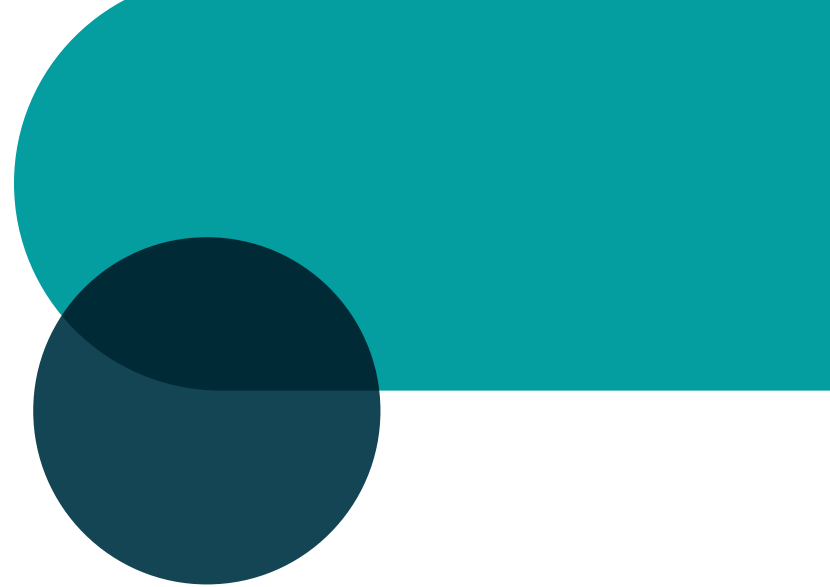
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Introduction

WFM is your key to happier staff and customers

With a cloud Workforce Management (WFM) solution, you can stop agonizing over complex spreadsheets that are prone to errors and start making a real difference for your company.

In this white paper, we explain everything you need to know about workforce management and what to look for when shopping for a solution. From the five crucial steps of WFM, to the must-have features and questions to consider, this is your guide to better resource planning and performance.



What is Workforce Management?

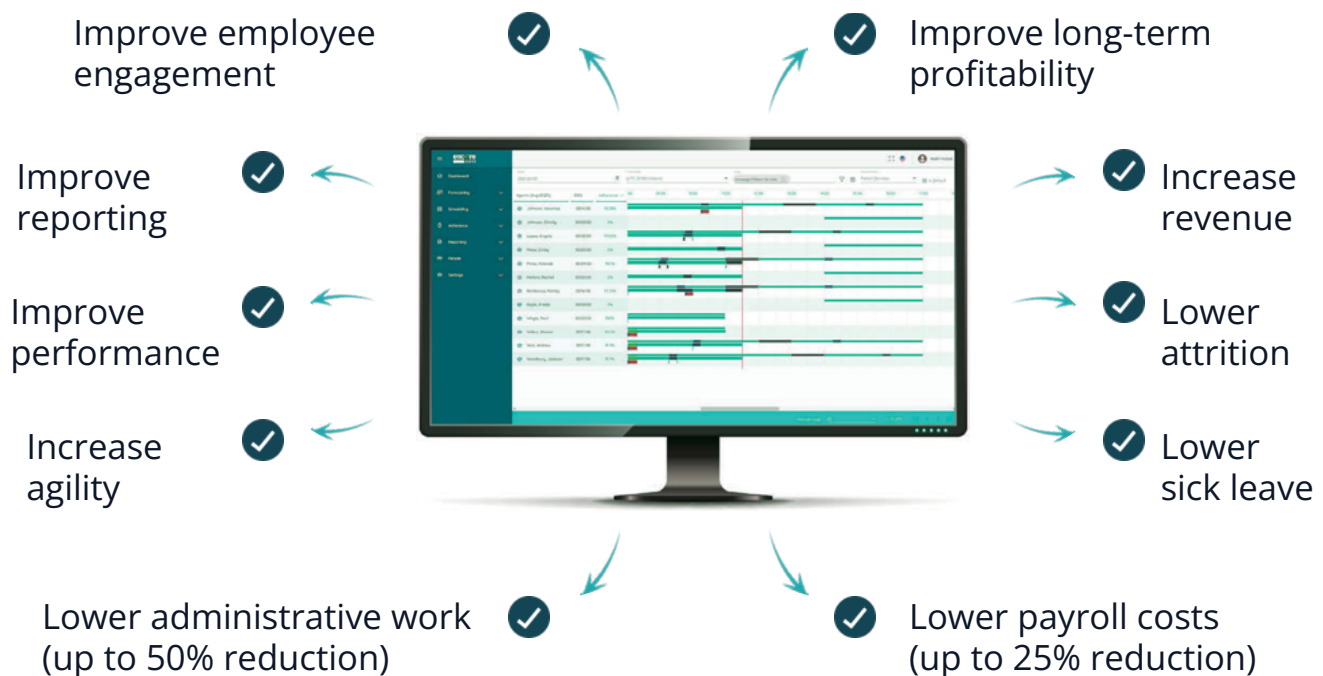
Workforce Management solutions help companies manage their staff more efficiently through forecasting, scheduling, intraday management, real-time adherence and reporting.

Supervisors of contact center teams – typically in service roles with diverse skill sets and/or working hours – use WFM software to help them accurately forecast future demand and staffing requirements. These forecasts are then used to generate staff schedules that are optimized to achieve the maximum level of productivity for the lowest possible cost.

During the scheduled time period, supervisors can adjust shifts in real-time and monitor adherence to ensure demand is continually met and staff are working productively. They can then close the loop with analysis and reporting, reviewing the accuracy of their forecasts and effectiveness of their schedules to continually improve performance.

The latest WFM solutions also include agent self-scheduling, which enables agents to submit their availability, request shift changes, trade shifts with colleagues, and manage their vacations via a dedicated agent portal. This significantly reduces the amount of administrative work for supervisors and increases agent engagement, leading to lower sick days and attrition.

WFM Benefits for Your Contact Center



Why do contact centers use WFM?

Contact centers typically employ customer service agents with diverse skills, who need to be strategically scheduled to meet customer demand across a range of channels.

For supervisors, this can be a complicated and time-consuming process, especially when working solely with spreadsheets. When you throw in lunch breaks, vacations, last-minute sick days, training days, unpredictable spikes in demand, overtime costs, and strict service-level agreements – it can become truly overwhelming and highly prone to error.

A WFM solution can help simplify and take the guesswork out of scheduling. By using historical data captured directly from the contact center, supervisors can generate accurate forecasts and create optimized schedules that will ensure the highest service levels for customers, the best experience for agents, and the lowest operational cost for the organization.

The scheduling process is reduced to just minutes, rather than days, and can be completed in a single application accessible on any device, at home or in the office. With agent self-scheduling, companies can also reduce managerial overhead while offering agents greater flexibility and autonomy.

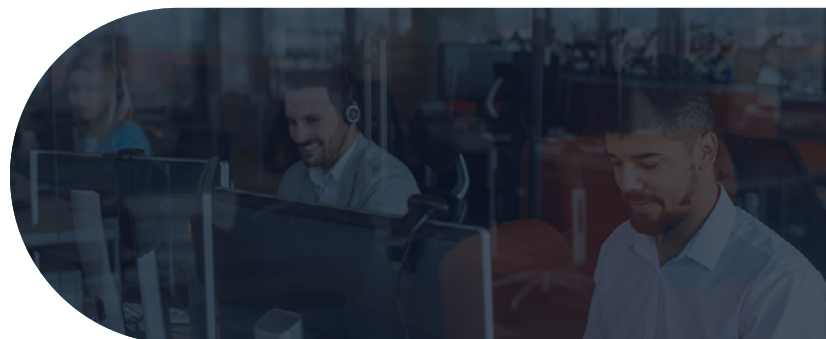
This all leads to improved customer satisfaction, employee engagement and revenue.

WFM Checklist

Does your contact center:

- ☐ **Manage multiple customer service channels**
- ☐ **Employ agents with a mix of skills, expertise and/or specializations**
- ☐ **Employ a large number of customer service agents**
- ☐ **Experience unpredictable periods of high and low demand**
- ☐ **Have set service-level agreements (SLAs)**
- ☐ **Operate outside of regular business hours (e.g. extended business hours or 24/7)**

If your contact center checks one or more of the above, you need WFM!



Understanding the WFM Process

Workforce Management involves five crucial steps: forecasting, scheduling, intraday management, adherence and reporting. In the contact center world, this is usually managed by a supervisor.

Step 1: Forecasting

To create a schedule, a contact center supervisor must first forecast customer demand. This will indicate how many staff members the contact center needs to meet expected service levels. To create an accurate forecast, the supervisor imports historical demand data captured directly from the contact center into the WFM solution. This data is analyzed and then used to generate a detailed graphical forecast. The forecast shows the expected contact volumes and average handling time (AHT) for each 15-minute interval over the date or time period chosen by the supervisor. If needed, the supervisor can then smooth the forecast by dragging and dropping any of the data points.

Step 2: Scheduling

Once a forecast has been created, the supervisor can then create a schedule. Still using the WFM solution, the supervisor can simply select the forecast to use and the system will generate a schedule automatically optimized to meet the predicted demand and all legal and contractual requirements. Agents' availability, shift preferences and skills are also taken into account. This information can be entered by the supervisor, or if agent self-scheduling is enabled, submitted by agents via a dedicated agent portal. By involving agents in the scheduling process, contact centers can improve agent engagement and retention. This also helps to reduce sick days, with agents able to trade shifts if they feel unwell.





Step 3: Intraday management

During the scheduled time, the supervisor can adjust or rearrange shifts at any time – and in real-time. For example, the supervisor can reassign shifts if an agent calls in sick or move shifts around to make time for a team meeting or company activity.

Step 4: Adherence

During the scheduled time, the supervisor can see what each agent is doing versus what they should be doing. If there are any deviations from the schedule, the supervisor can take action in real-time to ensure customer service levels continue to be met. Deviations from set plans are always bound to come up. The faster an organization can detect these, the faster it can react.

Most of the time, the reasons for deviations tend to be out of the supervisor's control (e.g. marketing is running a new campaign or finance has changed the appearance of invoices). That's why it's important for supervisors to communicate with all divisions and stay up to date on any events that may affect contact volumes and handling time.

Quantifying the cost of non-adherence:

100 agents
x \$14.00 per hour
x 30 minutes outside of adherence each day
= \$700 cost per day or \$256K per year

Through these steps, contact center supervisors can ensure their organization's customer service operation is always efficiently and effectively staffed.

Step 5: Reporting

At the end of the schedule, the supervisor can compare the targets with the actual data to determine if the forecasts were accurate or if modifications need to be made in the future. Supervisors can also generate a range of reports, including shift, adherence, vacation or payroll reports.

Shift reports provide a summary of shift times and activities performed by each agent, while adherence reports record how long each agent worked, the various activities they performed, and if they were ever late to a shift. Vacation reports show the number of authorized and remaining vacations for the current year and next year for each agent. And finally, payroll reports can be created to keep track of agents working extended hours so they can be appropriately compensated.

The Features to Look for in a WFM Solution

WFM solutions can vary greatly, so it's important to weigh all the information and implications for your contact center before making a decision.

We recommend starting with a clear set of business needs. What is it that you want to achieve? Why is your current WFM process or solution failing to deliver? And what are your pain points?

This should help you determine which technical features would be 'nice to have' versus those which you cannot live without. Buyers can then compare other factors, such as implementation, training, support and cost, to identify which solution will deliver the most value and return on investment.

If you employ a mix of office-based and remote agents, you may want a solution that includes agent self-scheduling.

Functionality

If your contact center currently serves more than one customer service channel (or plans to introduce more channels in the future) first and foremost, you'll need multi-channel forecasting. This will enable you to forecast the demand and staffing requirements for voice and all other digital channels, such as web chat and social.

If you employ a mix of office-based and remote agents, you may also want a solution that includes agent self-scheduling. This will enable your agents to manage their availability, vacations and schedules from home or in the office.

The next page shows the features considered to be 'must-haves' for effective workforce management.



Essential features for a successful Workforce Management solution

Forecasting

- Multi-Channel Forecasting — Generate forecasts based on historical data direct from your omnichannel contact center.
- Automatic and Manual Smoothing — Automatically or manually remove outliers and “special events” from your forecasts to improve accuracy.

Scheduling

- Optimized Scheduling — Create schedules based on forecast demand, defined work rules, agent skills, agent preferences, and service level goals.
- Intraday Management — Adjust and rearrange agent shifts in real-time to respond to real-life events in your contact center.

Adherence & Reporting

- Real-Time Adherence — See what agents are doing versus what they should be doing and track team performance in real-time.
- Reporting — Produce adherence, shift, vacation and payroll reports.

Agent Self-Scheduling

- Employee Interface — Enable agents to submit availability and self-service via a secure web portal to reduce managerial overhead.
- Mobile App — Enable agents to submit availability and self-service via a secure mobile app, accessible on Android and iPhone.
- Shift Preferences — Allow agents to specify preferred working times.
- Shift Swapping — Allow agents to request and trade shifts.
- Vacation Management — Allow agents to request and manage their own vacations.

Integrations

- Contact Center Solution — Consolidate your WFM and contact center solutions to streamline customer service operations.
- HR / Payroll Systems Integration — Connect your WFM and HR/Payroll solutions to streamline payroll processes.
- Open APIs — Connect your solution with any additional business-critical software and systems.
- Out-of-the-Box Integrations — Customize your solution with your favorite third-party apps to meet your business needs, now and in the future.

Security & Support

- True Cloud — Securely hosted within an enterprise-grade cloud infrastructure.
- GDPR — Fully compliant with GDPR privacy and data protection regulations.

Essential questions to consider:

- Does the solution have the tools you need right now to meet your business goals?
- More importantly, will the solution be able to grow with you as your needs change?

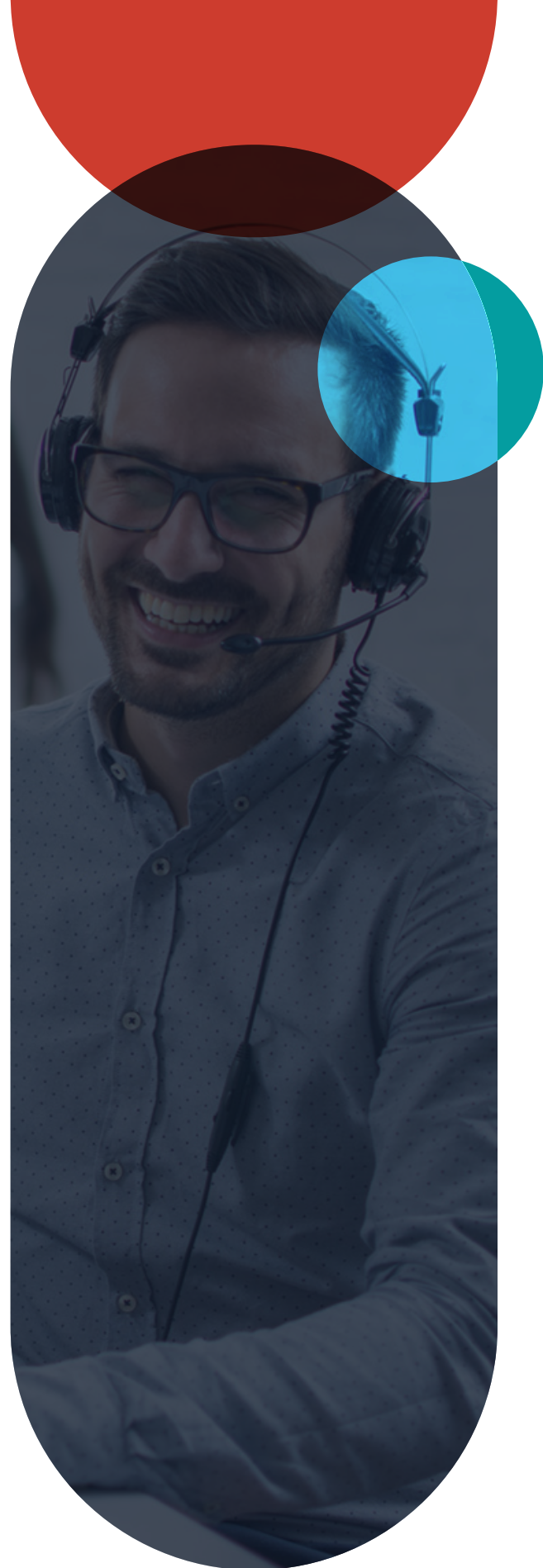
Implementation

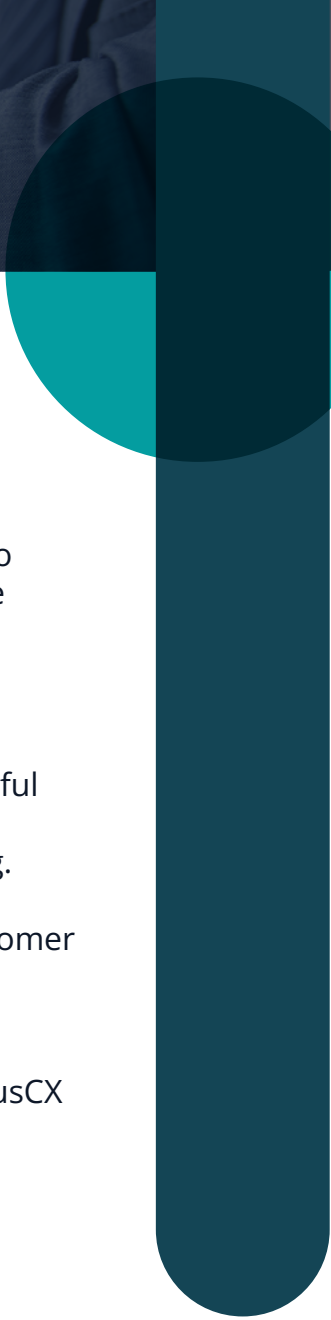
WFM solutions can take between 4 to 16 weeks to deploy, depending on the provider. This is because unique scheduling rules need to be set up for each company and interaction data needs to be imported. Usability can also impact deployment time. If the system is unintuitive and difficult to use, it will take longer to set up.

ChorusCX Workforce Management is one of the fastest solutions to deploy on the market, with an average setup time of 4 to 5 weeks. This enables users to achieve a return on investment (ROI) within as little as 3 to 4 months.

Essential questions to consider:

- How long will the solution take to set-up and deploy?
- What impact will this have on your contact center?





Training

There has been significant investment made in recent years to simplify and improve the usability of WFM solutions. Contact centers no longer want complicated systems that can only be understood and used by technology experts. Instead, they want software that is easy enough and intuitive enough to be used by anyone. This is especially important for smaller contact centers, who often rely on only one or two users and can therefore be vulnerable to sickness and unplanned absences.

Investing in a user-friendly solution will also help keep training costs low. While some WFM solutions can take up to 200 hours to learn, ChorusCX Workforce Management can be mastered in just 8 hours. At no additional cost, ChorusCX offers a comprehensive online course with an expert trainer available to answer all your questions.

Essential questions to consider:

- **Is the solution easy to use? How long will it take to train users?**
- **Can training be done in-house or will you need to purchase expensive specialist training from your provider?**

Ongoing support

As a customer service professional, we don't need to tell you about the importance of ongoing support. Having friendly experts on hand to answer your questions and offer support can be the difference between a successful WFM journey or one that is significantly more challenging.

ChorusCX offers friendly customer support with knowledgeable experts to help you at every step of the process as you implement and use the ChorusCX WFM solution to improve your staff management.

With a cloud solution, system upgrades, security-patching and version control are seamlessly optimized.

Essential questions to consider:

- **Who will maintain your solution?**
- **Will you have access to expert support?**

Budgeting & ROI for Workforce Management

In the past, only large contact centers with hundreds of agents tended to invest in WFM due to the high installation, training and maintenance costs associated with legacy solutions. However, the rise of easy-to-use, cloud-based solutions has now enabled even the smallest of contact centers to benefit from WFM.

When shopping for a solution, buyers should consider both cost and return on investment (ROI). Below are some of the areas where WFM users typically see savings.

1

Sickness

When staffing levels don't accurately match demand (e.g. are too low during busy periods or too high during quiet periods) this can lead to stress, boredom, low morale and potential sickness for agents. By improving forecasting and scheduling, contact centers can improve their agent experience and reduce sickness by around 1%.

2

Attrition rate

When agents are able to perform the tasks they are trained for, achieve their targets and objectives, see their schedules, and have some control over their working hours (e.g. swapping shifts and booking vacations) they are more likely to stay with your contact center beyond a year. As a result, WFM users typically see attrition rates fall by a minimum of 10%, saving them thousands in recruitment and training costs.

3

Overtime costs

With a WFM solution, contact centers can maximize the flexibility of staffing hours to reduce overtime costs significantly. With a low to medium change, a minimum saving of 10% can be achieved.

4

Staffing

With a WFM solution, contact centers can more accurately predict the resources needed for each 15-minute interval, bringing staffing levels closer to what is truly required. Contact centers can expect a minimum saving of 5%.

5

Adherence

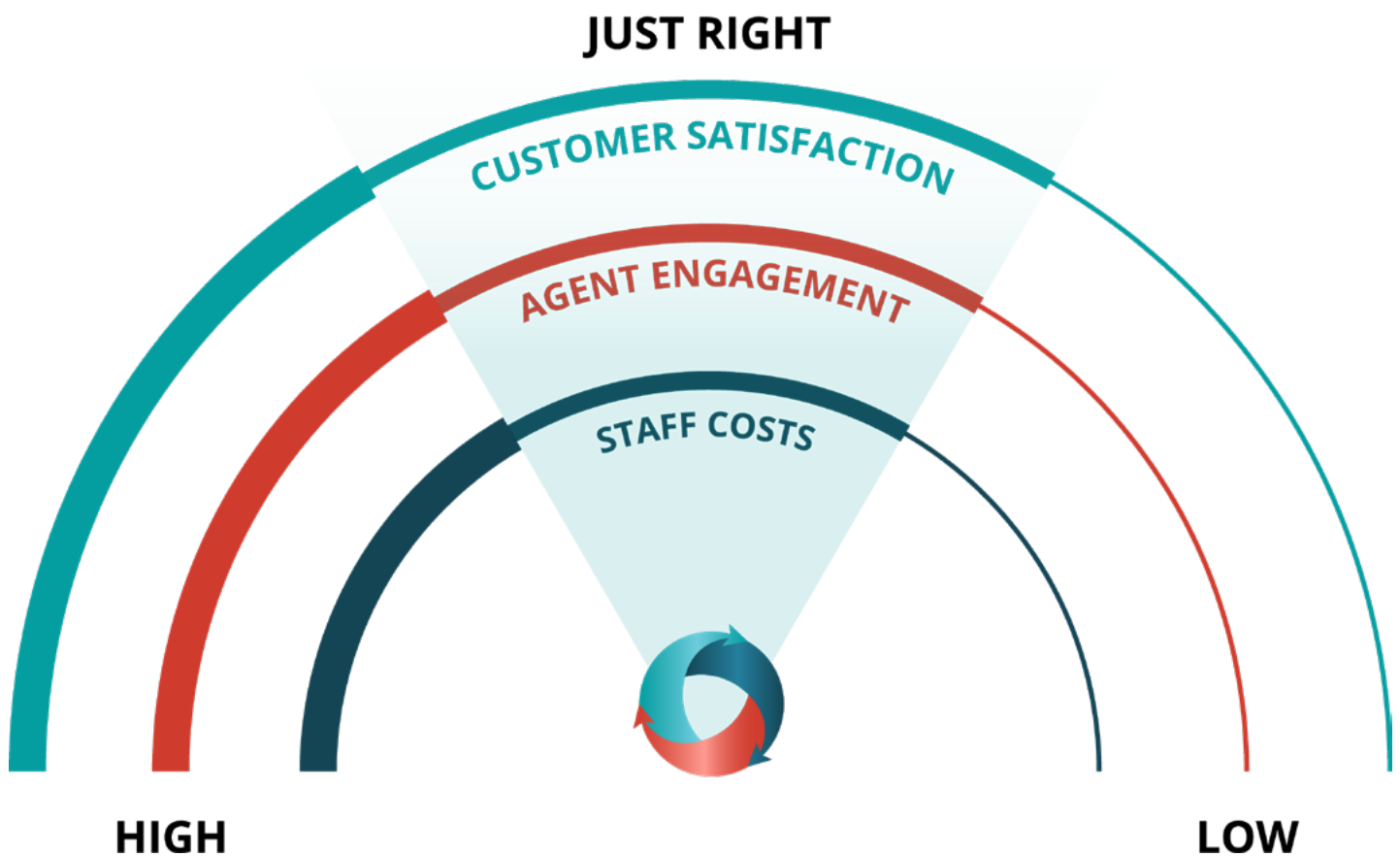
Adherence has a huge impact on contact center performance. For example, if a 10-minute unscheduled break is taken or an agent is pulled away from their schedule, the impact over the year can be costly. Ten minutes per day lost over the year could translate to losing around 35 hours of work time per agent per year.

Conclusion

Make a real difference in your contact center with Workforce Management. In the past, this tool was considered only within the reach of large contact centers with ample budgets, but now affordable, cloud-based Workforce Management solutions deliver this technology to contact centers of any size.

Ensure your contact center meets established service-level objectives, even during seasonal changes, while managing the cost of your in-house, offshore, or work from home staff. With real-time adherence, easily verify your agents are working on scheduled activities at the times you have planned. Engage your staff and provide the flexibility many employees seek in today's workplace with agent portals that enable your agents to manage their schedules.

With all-inclusive licensing, low total cost of ownership, and managed services that remove the burden from busy IT staff, Workforce Management is the tool you need to reduce agent attrition and advance your contact center.





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Workforce Management: We Get it Just Right

Leverage your workforce talent, control costs, and position your team to win with ChorusCX Workforce Management in the cloud.

Build a more productive, efficient workforce with these intuitive, easy-to-use workforce management tools:

- **Accurate Forecasting** – Create forecasts based on historical trends for your multi-skill, omnichannel contact center.
- **Optimized Scheduling** – Schedule agents to achieve service level objectives for your customers. Adjust staff on demand with intra-day management.
- **Real-Time Adherence** – Gain immediate insight into agent adherence to support real-time decision making.
- **All-Inclusive Licensing** – Simplify product purchasing and control costs with complete licensing for your team.

Gain a competitive edge today!