

WFO Triad: Making Workforce Optimization Work

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Introduction

- WFO – More than just workforce management (also use WEM) Workforce Engagement Management
- The importance of workforce optimization as a “STRATEGY” in contact centers (Role/Benefits)
- The need to harness the full potential of WFO tools working in unison
 - AI driven forecasting/scheduling, Conversational Analytics, Business INTELLIGENCE
- Workforce Management taking on a more active role in the WFO process
 - WFM MUST have a seat at the strategy table AND be a driving force in every organization's success
 - WFM/Operations/Quality MUST be in alignment
 - DATA – The importance of DATA and how to tell a story with it
- The goal: **Increase performance, enhance customer satisfaction, and streamline processes, ultimately increasing BOTTOM LINE \$\$**

Why the topic of Workforce Optimization

Contact centers continue to become more sophisticated and with sophistication comes new sets of challenges

Always looking to improve efficiencies at all levels

- Agent experience – customer experience – productivity – a zillion KPI's have to be measured, reviewed and analyzed
 - Agents working from home – keeping them engaged and **informed**
 - GIG workers – schedule management that benefits agent individual needs
 - Seasonality and spikes of volume, non voice data to be forecasted, scheduled, etc.
- The need for **ACTIONABLE** data continues to be echoed by all Leaders
- What does “Actionable” data mean – what data points are relevant
- Who “owns” the data analysis – follow through – dissemination of the findings to ALL divisions?
- Don't limit data to just numbers – utilize conversational analytics (transcripts, auto CSAT scores, etc.)
- Effective WFO strategies can save organizations 5% - 10% of their annual operating costs (Frost and Sullivan)

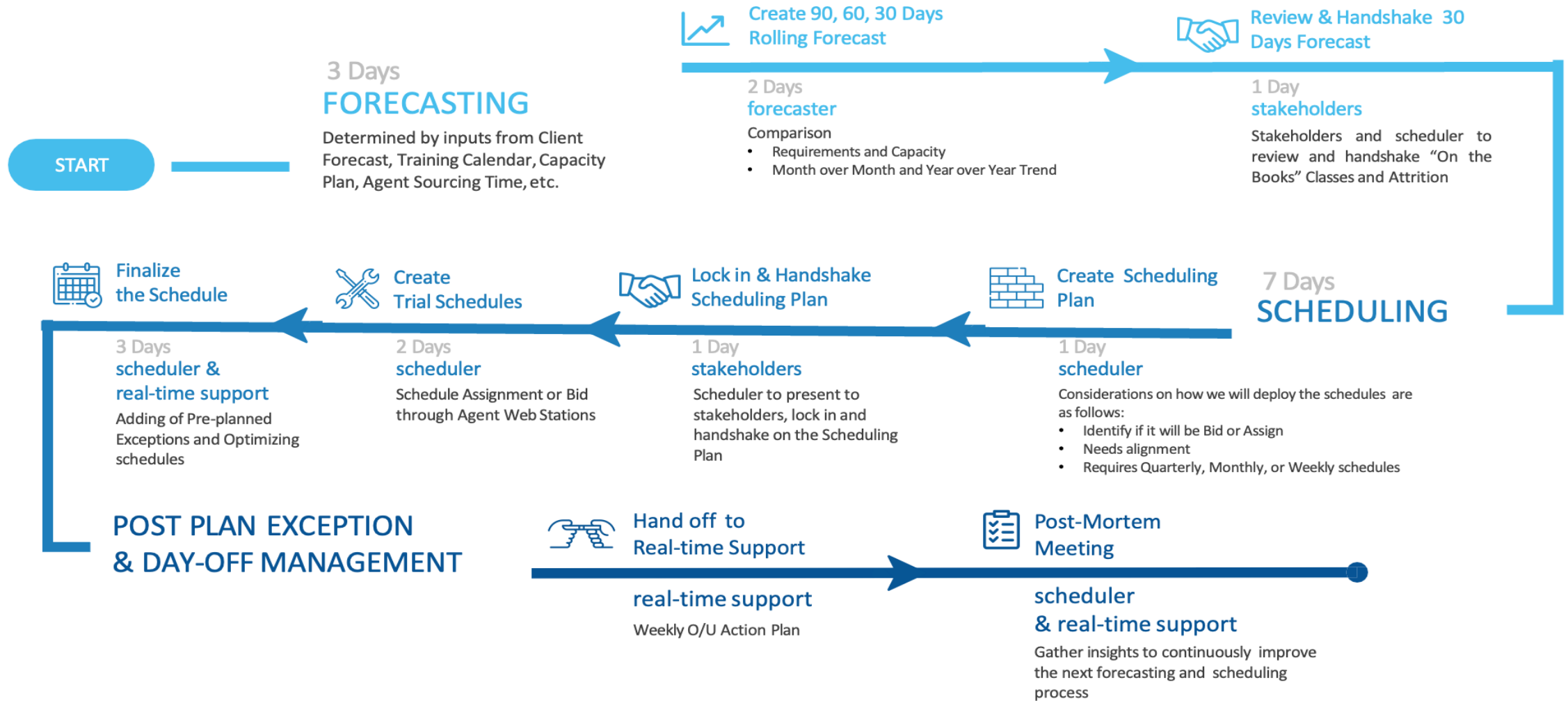
Importance of WFO processes

WFO success ensures that all teams work in unison and share common traits:

- WFO integrates technology, processes and human capital to improve service delivery and efficiency
- Effective Communication and collaboration WFM / Operations/ Analytics/ Quality/ HR/ Technology/ Training
 - Improves efficiencies and quicker response times
- Workforce Management “sees all, hears all, knows all” – has insights into virtually every aspect of the contact center environment
 - Regular updates on staffing levels, scheduling and performance metrics
 - Identifying potential bottlenecks and areas for improvement
 - Supporting real time adjustments*
 - Strategic planning
 - Providing operations analysis on volume, agent behavior, trends, areas of improvement, product insights
 - Reduce labor costs and operational overhead

Forecasting & Scheduling

BIG PICTURE PROCESS



WFO Pillars

- **Workforce Management – Performance Analysis**
 - HR, Recruitment and Onboarding
 - Operations/performance management
 - Training and Development
- **Quality Management**
- **Business Intelligence and Analytics**

Performance Analysis

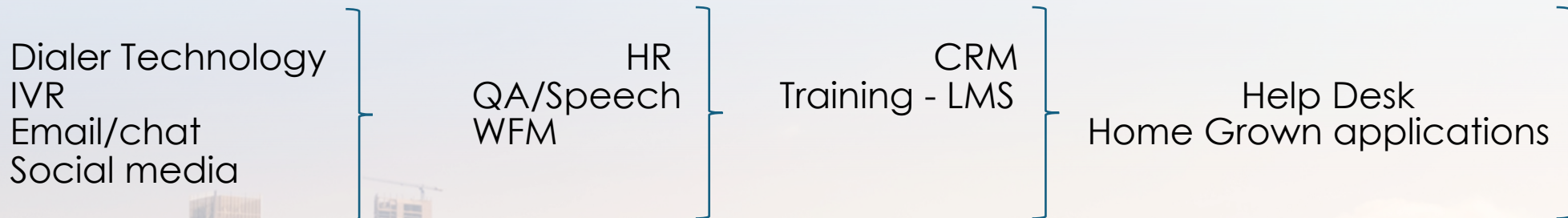
- WFO teams need to be data driven focused
 - No longer good enough to just provide why we are missing service level and updated forecasting processes
 - Interact with Quality and Speech, CSAT scores to provide greater insights
- Analyze data that affects agent effectiveness AND financial models for the organization
 - Shift Bidding
 - Impact of low Productivity, Occupancy and Utilization, Bill to Pay (understand definitions)
- Real-time feedback and coaching
 - Do agents know daily how they are doing, what their goals are, where they stand?
 - Do they have scorecards? – How are they “weighted” – How often shared
- CREATE OUTLIER REPORTS TO START WITH
 - 3 – 5 main metrics that can be focused on and can be improved upon by Team Leads

Quality Management

- Advanced quality management systems available that are game changers
 - Machine Learning – Key word/phrase Tagging, Agents and LLMS...
- Call recording, speech analytics, and automated scoring
 - **MUST HAVE IN TODAY'S ENVIRONMENT**
 - WFO Processes and WFM team can provide QA with more targeted approach at who to review and scorecards can be automated vs. manually done
 - WFM analysts can immediately detect anomalies in call volume, handle times, call avoidance, changes in customer feedback, product defects, billing issues, etc.
 - Human Diagnostics is still required to calibrate
- Delivering a consistent and exceptional customer experience

Data/Analytics – the keys to success

- There is SO much data being created, what to do with it and who “owns” it
 - The need for not only ACTIONABLE data but the need for predictive analysis and ACCURATE data
 - Data is still very much “siloesd” within business organizations
 - Not only siloesd, but contains errors



Data Statistics

Every company's goal is to improve customer experience (NPS/CUSTOMER SATISFACTION/CUSTOMER EFFORT)

74% of companies have increased customer experience spending over the past 6 months*

Companies are using various technology solutions to support their customer experience success:

- ✓ 70% use technology for their VoC programs
- ✓ 65% use AI or Machine Learning
- ✓ 64% have customer self-service solutions (IVA/chatbots)
- ✓ 63% have technology to help understand customer analytics

CHALLENGE: data is siloed and comes from multiple systems – it MUST be aggregated, and one source of data needs to be the “truth”

- WFM systems track call arrival patterns different than CCaaS systems affecting forecasting
- Data tables need to be identified and consolidated correctly

Sample Dashboard

SHRINKAGE AND CFT



11 of 11

Active HC / Roster HC



78.3%

Customer Facing Time %



35.7%

Productivity %

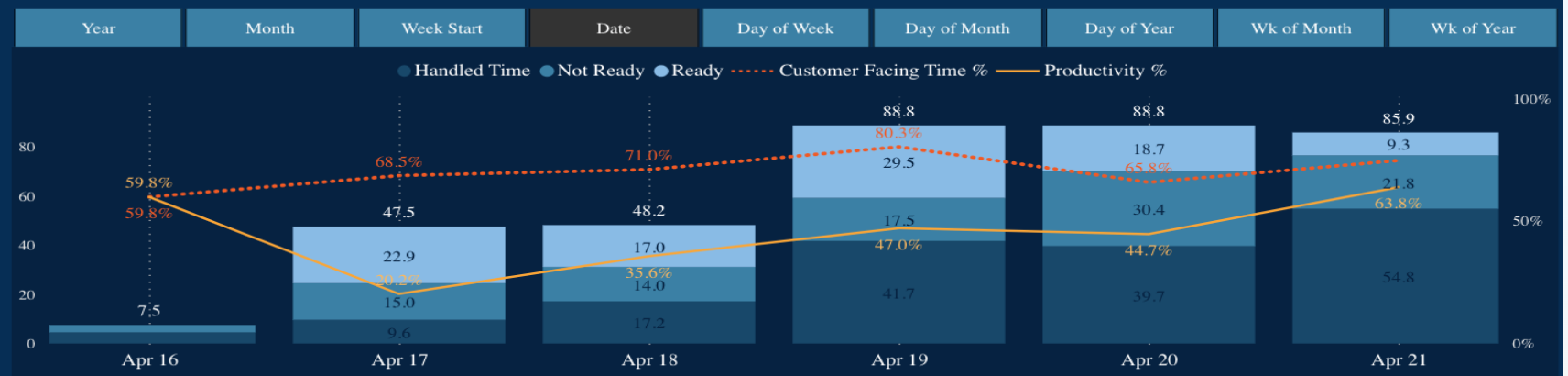


469.3 hr

Logged In Time

SHRINK BREAKDOWN

CFT vs Non-CFT	Aux Time	% of Total
Customer Facing Time	367.6 hr	78.34%
Additional Work Types	102.6 hr	21.87%
Handled Time	167.5 hr	35.69%
Ready (Avail)	97.5 hr	20.78%
Not Ready	101.6 hr	21.66%
ACW AUX	17.9 min	0.06%
Break Lunch	75.6 hr	16.11%
Development	23.5 hr	5.01%
Misc	1.5 hr	0.31%
System Downtime	46.9 min	0.17%
Total	469.3 hr	100.00%



VIEW TABLE BY ▶

Agent Name

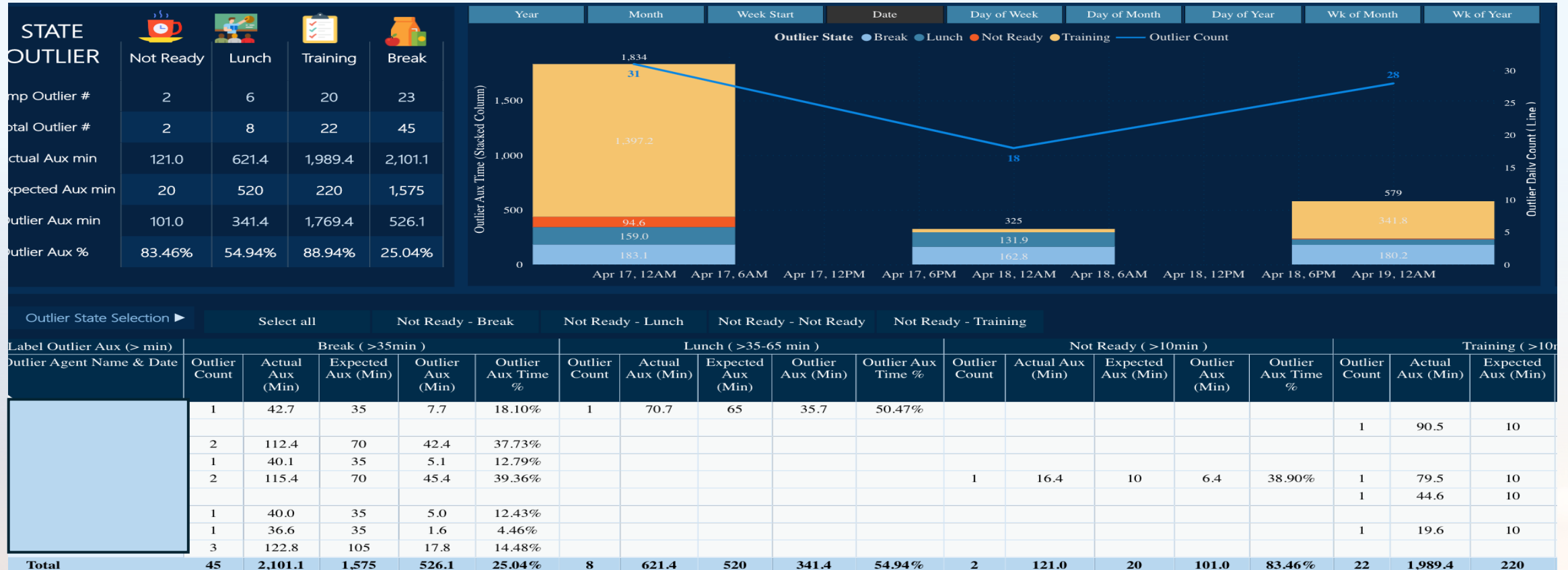
VIEW TABLE BY ▶

Total Time

| % of Total

Agent Name	CFT HC	Total HC	Calls Offered	Productivity %	Occupancy %	Customer Facing Time %	Logged In Time	Total Handle Time (min)	State Avail Time (min)	State Ready	State Not Ready	State ACW
	1	1	147	40.9%	88.1%	76.7%	45.5 hr	1,058.2	151.1	2.5 hr	24.4 hr	6.8 hr
	1	1	125	35.8%	88.8%	78.0%	36.7 hr	742.3	99.4	1.7 hr	21.9 hr	5.5 hr
	1	1	35	25.4%	32.0%	79.5%	45.7 hr	668.6	1,481.8	24.7 hr	9.4 hr	7.3 hr
	1	1	134	32.8%	67.3%	78.7%	46.0 hr	858.1	440.0	7.3 hr	23.6 hr	6.8 hr
	1	1	103	36.7%	49.0%	76.3%	44.0 hr	956.6	1,009.1	16.8 hr	11.0 hr	9.5 hr
	1	1	92	37.8%	48.8%	79.8%	45.2 hr	1,009.3	1,076.0	17.9 hr	10.2 hr	9.5 hr
	1	1	184	33.0%	66.2%	77.2%	44.5 hr	832.1	450.9	7.5 hr	22.3 hr	8.3 hr
	1	1	171	35.0%	86.6%	78.9%	36.8 hr	733.3	119.8	2.0 hr	22.0 hr	5.4 hr
	1	1	126	41.9%	87.0%	77.4%	45.2 hr	1,111.4	170.5	2.8 hr	23.4 hr	12.0 hr
	1	1	149	28.9%	51.4%	76.0%	34.8 hr	583.3	571.9	9.5 hr	15.2 hr	3.7 hr
	1	1	209	42.9%	80.3%	82.6%	44.7 hr	1,128.7	281.4	4.7 hr	20.8 hr	8.5 hr
Total	11	11	1,475	35.7%	63.2%	78.3%	469.3 hr	9,681.9	5,851.8	97.5 hr	204.3 hr	83.4 hr

Sample Dashboard – Outliers



Outlier State Selection ▶

Select all

Not Ready - Break

Not Ready - Lunch

Not Ready - Not Ready

Not Ready - Training

Employee Engagement

- Targeted coaching, setting clear expectations, and recognizing top performers
- Flexible scheduling options
- Employee surveys
- **Ambassador Clubs**
- **Gamification**
- Greater control over work-life balance for agents

Maximizing the benefits of WFO

- Best practices for unlocking the full potential of WFO
- Invest in the Right Tools
- Train Managers and Agents
- Foster a Culture of Continuous Improvement
- Monitor and Adjust

Areas for early success

- Auxiliary code review
 - Client improved occupancy/productivity by 13% within 27 days of just focusing on agent non-available time
- Bridge gaps between departments – we are all seeking the same outcome – better and more efficient
- Have daily discussions with all departments on 2 or 3 KPI's to focus on (Don't boil the ocean)
- **Daily stand up huddles with Operations**
 - Can eliminate multiple “one-off” meetings throughout the week
 - Provides insight into potential challenges with interval performance
- Typical results
 - Reduction in talk time by 10%
 - Reduction in Wrap/Aux code use by 20-25%
 - Increase in CSAT – External and Internal

Conclusion

- Embracing a comprehensive approach to WFO
 - **Strategic** Discussions with ALL stakeholders
 - Ensure that Workforce Leadership has a chair at the table for strategy
- Investing in the right tools, training, and **culture**
- The importance of understanding and leveraging modern WFO solutions for a competitive edge and exceptional customer experiences
 - Other solutions available vs. traditional WFM software
 - COMBINE data into a single unified system and make data available to **ALL DIVISIONS**

Thank
You!

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