# From Chaos to Control: Transforming Contact Center Efficiency with Workforce Automation



## **Agenda**

i. Introduction

ii.SLAM Bot Overview

iii.RTA Bot Overview

iv.Post-deployment Outcomes

v. Upcoming Bots

vi.Q&A and Contact Info

#### **Introductions**

Jennifer Springs, Director Workforce Analytics at Maximus, Inc.

 20+ years WFM experience. Leads a team of ~70 WFM/WFO professionals that support 25 contact centers within the Maximus portfolio.





Nizar Mechergui, Senior Manager, Workforce Planning at Maximus, Inc.

 16+ years of experience in WFM. Leads a team of WFM professionals across multiple programs, driving strategic workforce initiatives and optimization efforts.

### **Workforce Management and Optimization (WMO)** – Jennifer Springs

SOA WMO provides Workforce Management (Short-term Forecasting, Scheduling, and Real Time Monitoring) support through a collaboration of humans and robots with the goal of providing projects with the operational insights and recommendations necessary to achieve their internal and contractual goals throughout the contract's lifecycle.





### **Workforce Management (WFM)**

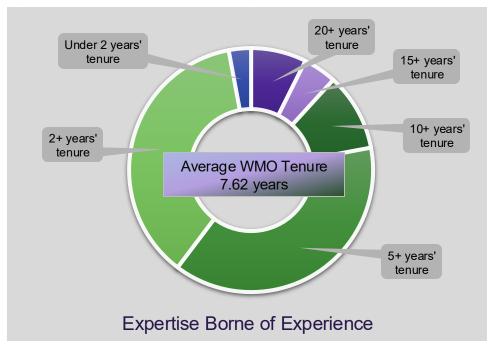
- Tactical Forecasting project interval demand up to 30 days into the future
- Schedule Optimization efficiently plan agent activities to staffing requirements
- Real Time Adherence Monitoring respond to changes in plan to meet SLAs
- Performance Management & Analysis assess performance against targets and provide recommended actions for future success

# Y ...

#### **WFM Automation Bots**

- RTA Bot Deployed to 20+ projects spring 2024. Sends MS Teams messages to agents when they are out of adherence. Reduced Shrinkage
- **SLAM Bot** Deployed Spring-Summer 2025. Sends MS Teams messages to WFM and Operations when Queue conditions indicate action needed.
- **Schedule Bot** Deploying Summer 2025. Automatically updates approved exception requests to the agent's schedule in Genesys.
- Attendance Bot Deploying Fall 2025. Automatically updates Attendance notifications to the agent's schedule in Genesys.





## **SLAM Bot**

- Overview
- I. SLAM Parameters

### SLAM Bot Overview (Phased release complete 9/21/25)

#### What is the SLAM Bot?

- Monitors queue performance in real-time using predefined thresholds
- Track metrics like SL, ASA, Longest Call, Calls Waiting, and Idle Agents
- Scans agent status against predefined parameters
- Sends actional alerts via MS Teams to WFM and operations teams

#### **Key Challenges (Before Bot)**

- Manual Queue monitoring = reactive and slow
- Issues like high ASA or low SL often identified too late
- Delays in escalation lead to SLA breaches
- WFM & Ops teams spend excessive time gathering data

#### **Key Features (Bot Solution)**

- Constant Automatic Monitoring, WFM and Ops no longer need to manually watch the queues
- Real-Time visibility, gives WFM and Ops instant awareness of queue status
- Targeted, actionable alerts, ensures timely detection of SLA issues
- · Proactive performance management, supports faster interventions and reduces manual workload

SLAM Bot Deployed in 2025 to 20 projects

### **SLAM Bot Management Process: Before vs After**

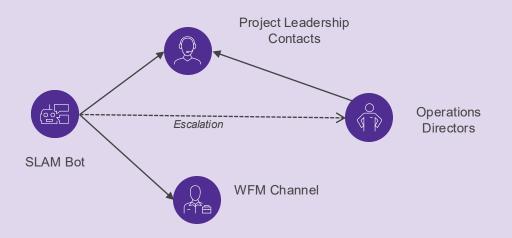
#### Old workforce management process

- 1. WFM monitors dashboards manually **by using** multiple internet browsers
- WFM inform supervisors of trigger condition thru Microsoft Teams
- 3. Supervisors' confirm receipt and begin assigned action
- Irregular tracking of ongoing Contact Center performance



#### New workforce management process

- 1. SLAM Bot detects instantly
- **2. Immediate** MS team alerts to designated contacts in WFM and Operations simultaneously
- 3. Communication on actions being taken happens in MS Teams alert chat
- Ongoing tracking of queue performance reviewed regularly



### How The SLAM Works

		Call Cente	er Condition	S	
Condition Status	Blue	Green	Yellow	Orange	Red
Trigger	ASA below 60 seconds (< 1:00)	ASA 60 - 90 sec (1:00-1:30)	ASA 90 - 120 sec (1:30-2:00)	ASA 120 -180 sec (2:00-3:00)	ASA over 180 seconds (>3:00)
Offline Time	Normal	Loose	Reserved	Tight	Closed
Available Offline	Coaching Projects Nesting QC Reviews System Downtime Account Work	Coaching Projects Nesting QC Reviews System Downtime Account Work	Account Work	System Downtime	
Prescheduled Training	Training Unaffected	Training Unaffected	Training Unaffected	Training Unaffected	Training Canceled - except hard deadline
Real-Time Training	Encouraged	Encouraged	Discouraged	Prohibited - except hard deadline	Prohibitied - All
Team Meetings	Additional Team Meetings possible	Team Meetings as Scheduled	No Additional Team Meetings	No Additional Team Meetings	Team Meetings Cancelled
Auxiliary (outbound, QC, & support staff) Actions	Normal duties	Normal duties	Go Ready Skilled	On Ready	On Ready
Supervisor Actions	Monitor unit for long calls, Sup Queue Assist, QC, 1x1s as needed	Monitor unit for long calls, Sup Queue Assist, QC	Monitor unit for long calls, Sup Queue assist, Monitor Auxiliary staff	Monitor unit for long calls, Sup Queue if scheduled, Monitor Auxiliary staff	Ready Skilled as WFM directs, Except designated Floor Support
WFM Actions	Offer additional 1x1s and special projects	Notify Auxiliary of ready stats	Re-skill cross trained if possible/ Notify additional auxiliary of ready stats	Notify sups of agents on long NR and auxiliary staff not logged in	Notify sups of ready status, inform managers of Sups/auxiliary staff not logged in

Trigger Conditions

Actions by activity

Actions by role

#### Metric Alert

NYIA: Daily ASA Threshold Breach Call Center Performance Attention WFM & OPS Teams

Current ASA: (106 seconds)

#### Actions for WFM Team:

- 1. Analyze queue trends and identify contributing factors
- 2. Adjust future schedules and review forecast accuracy
- 3. Prepare for potential reallocation of staff if trends persist

#### Actions for OPS Team:

- 1. Actively monitor queues and support agents handling long calls
- 2. Postpone non-critical tasks (e.g., Off queue time) to maximize availability
- 3. Provide real-time feedback to agents to improve response times.

#### Metric Alert

MLTC: Longest Call Waiting Alert

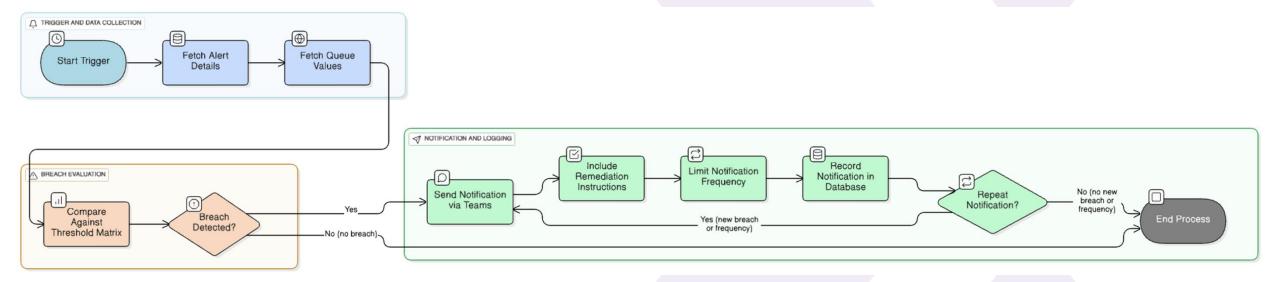
Call Center Performance

The longest call waiting is now 169 value, immediate intervention is required

- · Redirect auxiliary staff to handle calls urgently
- · Suspend all non-essential offline activities



## How The SLAM Works





#### Feedback from Users

"The SLAM Bot Alert system its great tool in keeping our team informed and proactive. The real-time alerts for Calls Waiting, Average Speed of Answer, and Abandon Rate and SLA thresholds have been instrumental in driving timely decisions and proactive workforce management.

Thanks to these timely notifications, we've been able to:

- Quickly identify and respond to call spikes
- Reduce ASA by reallocating resources efficiently
- Minimize abandon rates through timely interventions
- Stay ahead of potential SLA breaches
- Improved visibility into queue health and agent performance
- Better SLA adherence by enabling quick resource adjustments"
- Pam, WFM Supervisor

"The SLAM bot has been a nice additional tool to help with ensuring our metrics are being met and with making everyone aware simultaneously, it's easier to delegate quick changes when needed." - Lauren, WFM Analyst

"The SLAM bot provides a clearly documented framework for escalating issues in a timely manner, ensuring prompt resolution. We can optimize resource allocation and improve overall project satisfaction." - Johanna, WFM Analyst

## RTA Bot Overview

- Real-Time Adherence Bot Overview
- Management Process: Before vs After
- III. RTA Parameters

#### Real-Time Adherence Bot Overview

#### What is the RTA Bot?

- Automated tool that monitors real-time adherence.
- Scans agent status against predefined parameters
- Send MS Teams alerts to agents, supervisors, or managers

#### **Key Challenges (Before Bot)**

- Manual monitoring of adherence = Time-consuming
- Delays in identifying outliers
- Escalations often too late to prevent shrinkage impact
- WFM staff acting as "police" instead of analysts

#### **Key Features (Bot Solution)**

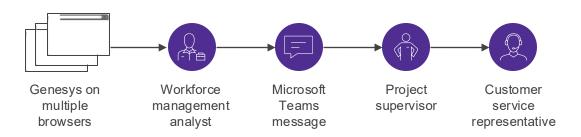
- Automated scanning of agent activity
- Reduced Labor for WFM and contact Center management
- Immediate alerts for deviations
- **Escalation hierarchy**: Agent → Supervisor → Manager
- Data logs for trend analysis and continuous improvement

RTA Bot Deployed in 2024 to 23 projects

### RTA Bot Management Process: Before vs After

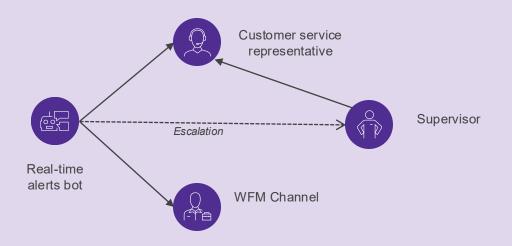
#### Old workforce management process

- 1. Agent deviates
- 2. WFM monitors dashboards manually **by using** multiple internet browsers
- WFM inform supervisors of nonadherence thru Microsoft Teams
- Supervisors' check-in with agents who are not adhering to schedule
- 5. Irregular tracking of ongoing agent adherence



#### New workforce management process

- 1. Agent deviates
- 2. RTA Bot detects instantly
- **3. Immediate** MS team alerts to agent
- 4. Escalation if unresolved
- Ongoing tracking of agent performance reviewed regularly



#### **RTA Bot Alert Parameters**

<b>Actual Activity</b>	Threshold	Supervisor	Manager
Restricted	3 minutes	Yes	Yes
Moderate	5 minutes	No	No
Productive	10 minutes	No	No
Logged Out	10 minutes	No	No

#### Considerations for configuring bot functionality:

- Thresholds balance accountability with flexibility
- Escalation ensure timely intervention without overwhelming supervisors
- Alert frequency is **controlled** to maintain engagement
- Interactive alerts allow agents to self-correct, justify, or start a chat discussion with their supervisor
- All interactions are recorded, feeding a real-time dashboard for coaching and trend analysis.

nizarmechergui@maximus.com - You are out of adherence. Please return to your scheduled activity.

I acknowledge that I am not in adherence & will resume my scheduled activity.

nizarmechergui@maximus.com - You are out of adherence. Please return to your scheduled activity.

I acknowledge that I am not in adherence & will resume my scheduled activity.

My supervisor has granted me approval to engage in this unscheduled activity.

nizarmechergui@maximus.com - The agent is out of adherence due to not being logged into Genesys

## Post-deployment Outcomes

- Segment Wide Performance
- II. Savings & Unexpected Gains
- III. Feedback from Users

## **Segment Wide Results**

#### **Shrinkage and Stability:**

~3% overall In office shrinkage reduction

77% of contact centers (17 sites) reduced shrinkage

☆6 projects achieved 5%+ reduction

Post-deployment shrinkage now stable & predictable, improving planning



#### **WFM Time Savings:**

ONo more manual monitoring, bots do it automatically

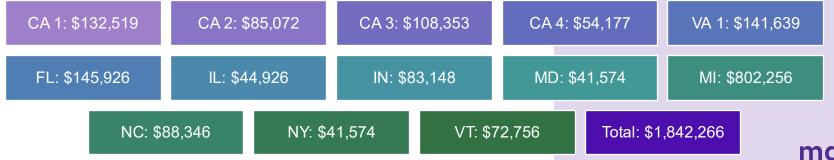
Frees WFM to focus on analysis and proactive planning

Fifticiency gains, bots cut from 75% of WFM monitoring time to 25%

## Savings & Unexpected Gains

- Saving Achieved:
- 82% of projects achieved FTE savings
  - 75% of projects that expected savings delivered them
- Planned FTE savings: 66 FTE
- Proven FTE savings: 43 FTE (Attributed to the BOT)
  - Variance explained by scope changes & other initiatives
  - Agents not replaced after attrition (Staff not reduced thru forced attrition)

Project	Expected	Acheived
CA 1	Expected: 0	Achieved: 3
CA 2	Expected: 1	Achieved: 3
IN	Expected: 0	Achieved: 2
NY	Expected: 0	Achieved: 1
FL	Expected: 3	Achieved: 4



#### **Feedback from Users**

"The RTA Bot has significantly improved real-time monitoring, allowing us to quickly address adherence gaps and ensure agents stay on schedule. This has led to better time management and increased overall efficiency." – Adam, WFM Manager

"The RTA BOT has been quite helpful for me. With how busy things can get, and not always being able to monitor Genesys closely, receiving reminders or notifications is useful. Personally, it allows me to promptly address the situation and remind the agent when they are not following their schedule." — Yanira, Operations Supervisor

"Being able to see a holistic view of who are the frequent out of adherence offenders gives me the ability to do targeted coaching with my supervisors and agents. I really appreciate the dashboards that come with the RTA Bot!" - Charlene, Operations Manager

## Upcoming Bots

- Schedule Exceptions
- II. Attendance

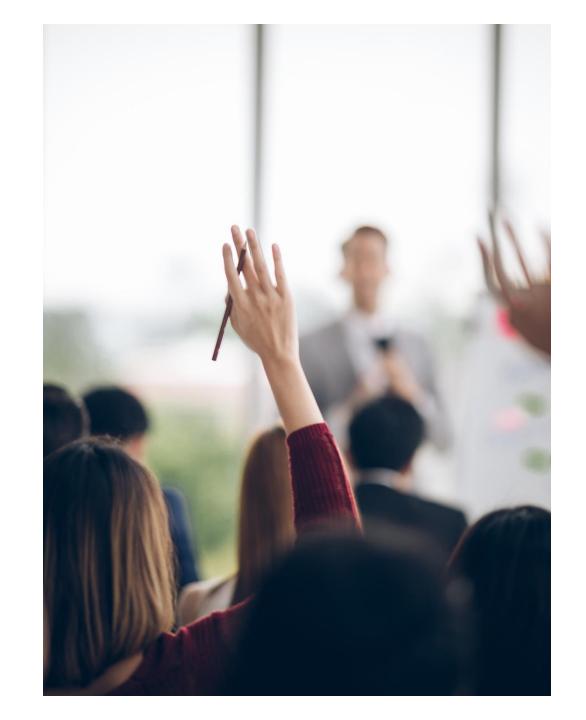
## Upcoming bots approved based on success of RTA Bot







## Questions



#### **Contact Information**



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Please take a moment to complete the session evaluation!

## Appendix



## Schedule Bot Overview (Phased release complete Jan 2026)

#### What are Schedule Exceptions?

Agents are scheduled for On Queue time and Off Queue time throughout their day. The periods of time when an agent isn't following their schedule are called Exceptions. Sometimes these exceptions are driven by Operation needs.

We have two methods for identifying and updating these exceptions. The Schedule Bot monitors Genesys and can auto-approve, send to Supervisor, or send to WFM to approve. If approved, the schedule is updated automatically. Additionally, there is a form process the supervisor can use to submit exceptions for processing.



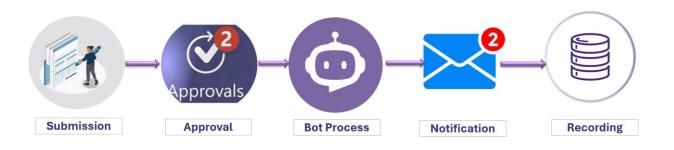
#### **Key Benefits:**

- Strategic Impact: Automates the capture and processing of schedule exceptions directly from Genesys, applying predefined business rules and routing changes through an approval workflow.
- Operational Benefit: Ensures timely and accurate schedule updates aligned with staffing needs, improving adherence, agent experience, and service reliability.
- WFM Efficiency: Significantly reduces manual effort by automating exception handling, allowing analysts to focus on proactive planning and optimization.
- Scalability: Supports centralized management of schedule changes across multiple projects with minimal resource impact.
- Estimated Annual Savings: 0.5 FTE, with improved schedule accuracy and operational responsiveness.

## Attendance Bot Overview (Phased release complete May 2026)

#### What is the Attendance Bot

 The attendance update bot uses Genesys APIs to automatically updates attendance-related occurrences to agent schedules and reoptimizes break and meal activities for the remainder of the shift, ensuring schedule accuracy and operational efficiency. This eliminates the need for WFM staff to manually adjust the agent's schedule in Genesys.



#### Key Benefits:

- Strategic Impact: Standardizes attendance tracking across all US Services projects through automation.
- Operational Benefit: Ensures timely and accurate schedule adjustments, enhancing coverage and minimizing service disruption.
- WFM Efficiency: Reduces manual processing time and improves real-time visibility into agent availability.
- Estimated Annual Savings: 0.5 FTE, with increased accuracy and responsiveness