



***From Bots to Better Decisions: How AI
Transformed Workforce Management Without
Reducing Headcount***

Introductions


Jennifer Springs, Director Workforce Analytics at Maximus, Inc.

- 19+ years WFM experience. Leads a team of WFM/WFO professionals that support over 30 contact centers within the Maximus portfolio.



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

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

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1. Life before the bots
 2. Overview of Bot Solutions
 3. Challenges with Change

Life before the Bots

WFM Reality

- Overwhelming Manual tasks
- Manual monitoring (RTA, SLA)
- Manual schedule & attendance updates
- Reactive operations

What Was Holding Us Back

- Limited time for analysis
- Delayed response to issues
- Repetitive work → burnout

Overview of Bot Solutions

Real Time Adherence (RTA) Bot

- Monitors agent adherence and reached out to agents when out of adherence

Service Level Action Matrix (SLAM) Bot

- Monitors key metrics and alerts WFM and Operations when outside thresholds

Schedule Exception Bot

- Monitors when agents are out of adherence and automatically updates Genesys when exceptions are approved by supervisors

Attendance Update Bot

- Monitors agent attendance and automatically updates Genesys when agents are absent or tardy

RTA Bot - Benefits



Real-Time
Adherence
Visibility



Proactive Issue
Detection &
Response



Clear Accountability
Through
Escalation

Real-Time Adherence Visibility

- Continuously monitors agent adherence against predefined parameters
- Provides immediate awareness of off-schedule or non-adherent activity

Proactive Issue Detection & Response

- Instant MS Teams alerts notify agents, supervisors, or managers as soon as deviations occur
- Enables faster corrective action before performance or SLA impact

Clear Accountability Through Escalation

- Built-in escalation hierarchy (Agent → Supervisor → Manager)
- Ensures the right level of intervention at the right time

Segment Wide Results

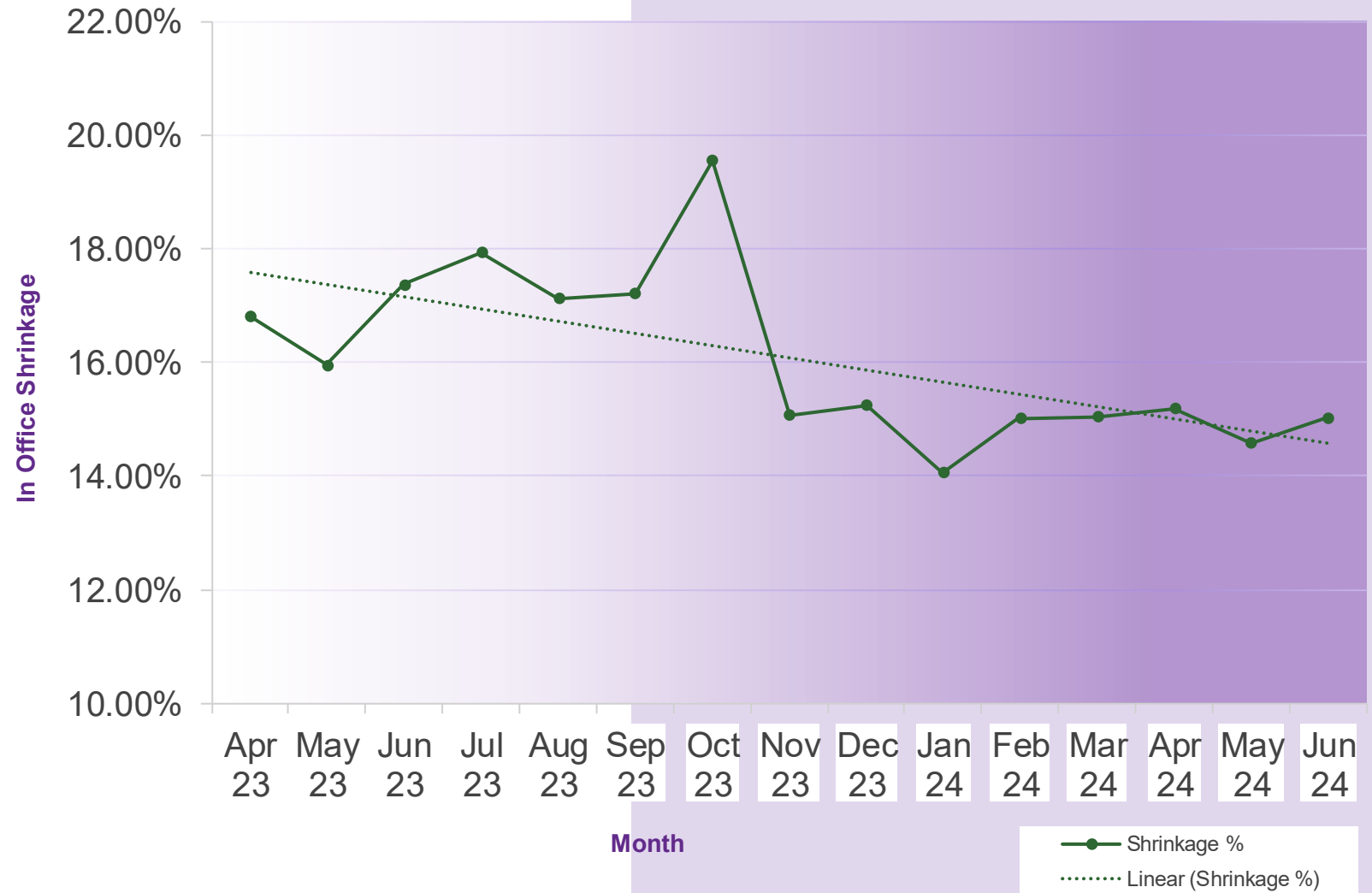
Deployment Success:

- Post-implementation, shrinkage values become stable and predictable, enhancing projects planning

Apr-Jun 2023 vs. Apr-Jun 2024 Comparison:

- Initial review period showed inconsistent shrinkage month over month.
- After implementation, shrinkage was both reduced and consistent.

Segment Wide Shrinkage Trend



SLAM Bot - Benefits

Operational Awareness & Speed

- Provides real-time visibility into queue performance across SL, ABA, ASA, longest call, calls waiting, and agent availability
- Eliminates the need for WFM and Operations to manually monitor queues

Actionable, Targeted Alerts

- Sends intelligent, actionable alerts via MS Teams directly to WFM and Ops
- Reduces alert fatigue by focusing attention only when action is required

Improved Decision-Making

- Aligns real-time data with human judgment for more informed, timely decisions
- Supports stronger collaboration between WFM and Operations teams



Improved
Decision-
Making

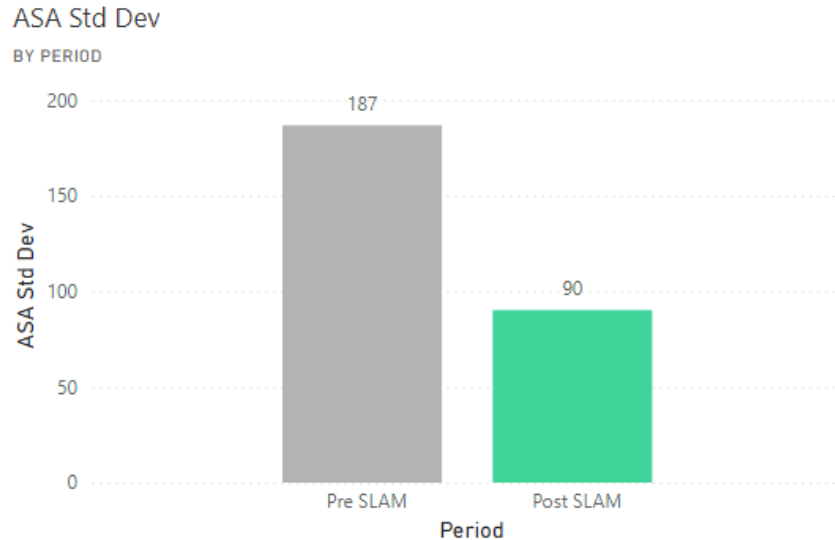


Actionable,
Targeted
Alerts



Operational
Awareness
& Speed

SLAM Bot - Impact

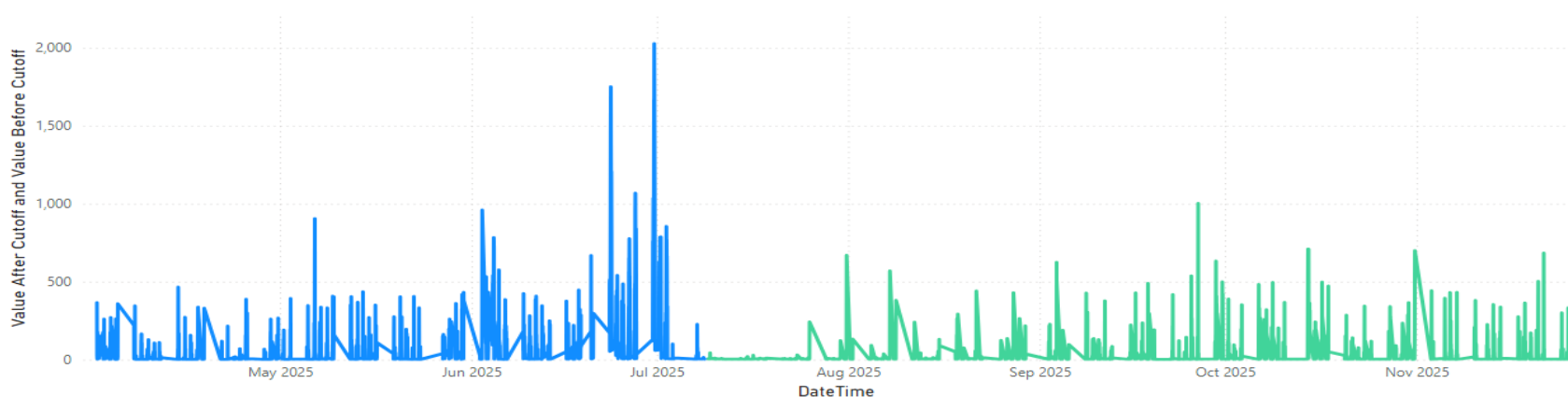


- **Pre-SLAM**, ASA variability was 187, indicating a lot of fluctuation and unpredictability in performance.
- **Post-SLAM**, ASA variability dropped to 90 – approximately 52% reduction, showing more stable and consistent ASA.

Pre-SLAM, ASA target compliance was 79.74%.

Post-SLAM, ASA target compliance improved to 84.16%, approximately 6% increase, showing more intervals meeting service targets consistently.

Value After Cutoff, Value Before Cutoff
BY DATETIME



Schedule & Attendance Automation

Schedule Bot

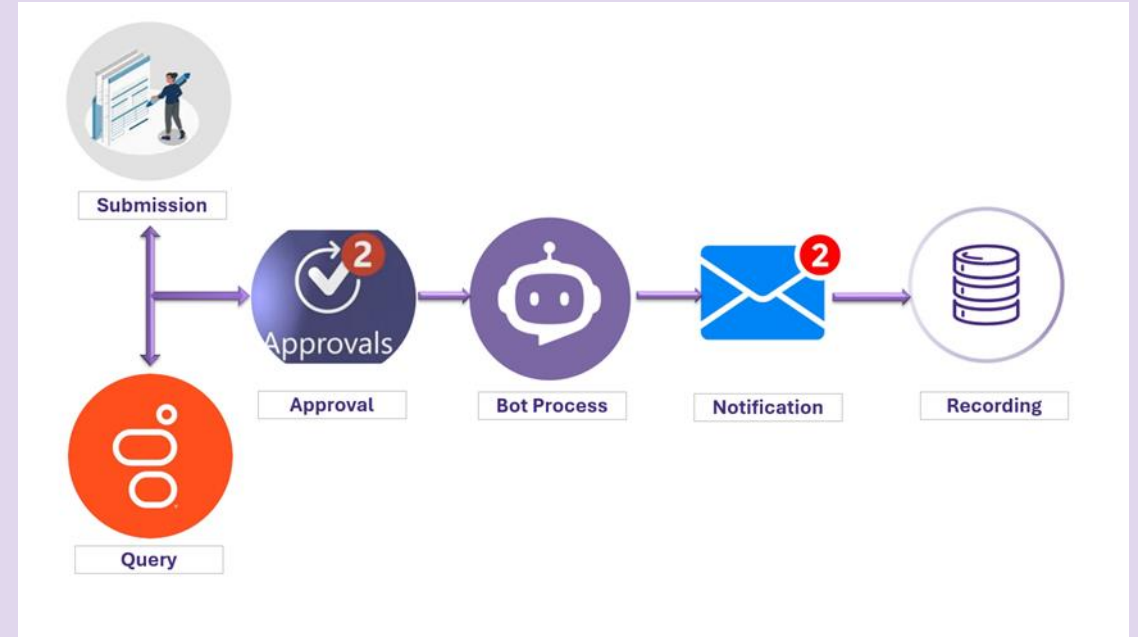
Manages schedule changes and exceptions

- Detects schedule exceptions in real time
- Applies predefined business rules
- Routes approvals automatically
- Updates schedules without manual intervention

Attendance Bot

Keeps schedules accurate throughout the day

- Automatically records attendance events
- Reoptimizes breaks and meals mid-shift
- Maintains real-time coverage accuracy
- Eliminates manual schedule adjustments



Schedule Update & Attendance Bots Benefits



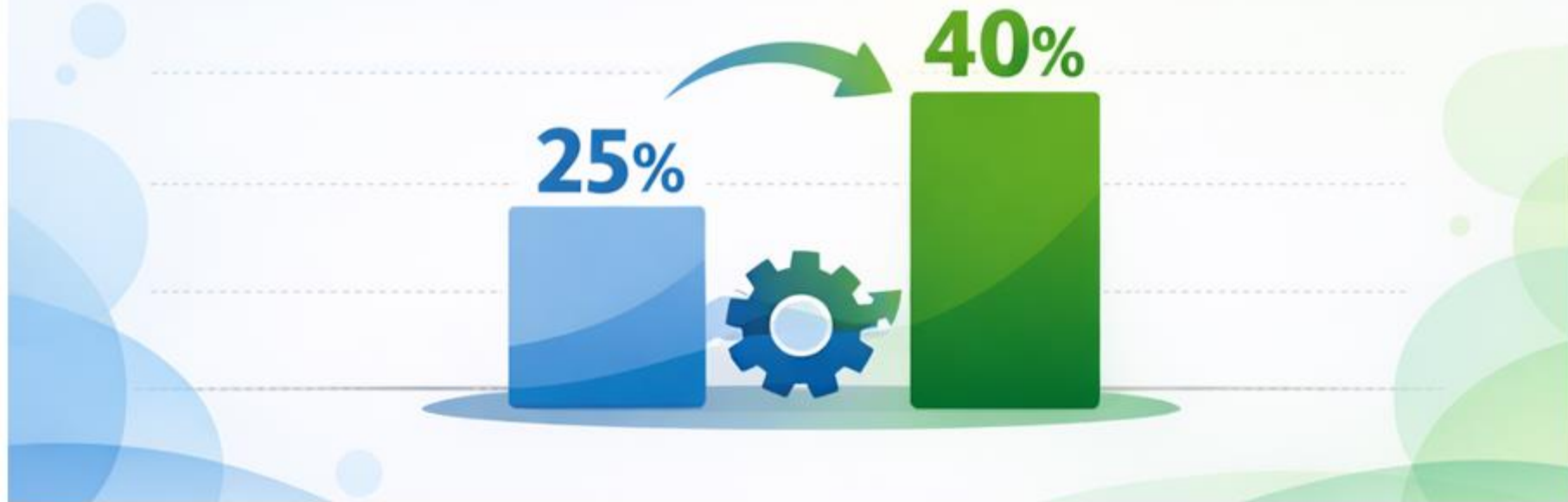
Performance Snapshot

	Attendance	Schedule
Records	268 records	2050 records
Avg handling time	5 min	2 min
Hours saved	22 hrs. saved	68 hrs. saved

**90
hours/day**

Time Reclaimed

Automation Freed Up **25%–40%** of Our Team's Time!



The Real Challenge:

The Real Challenge

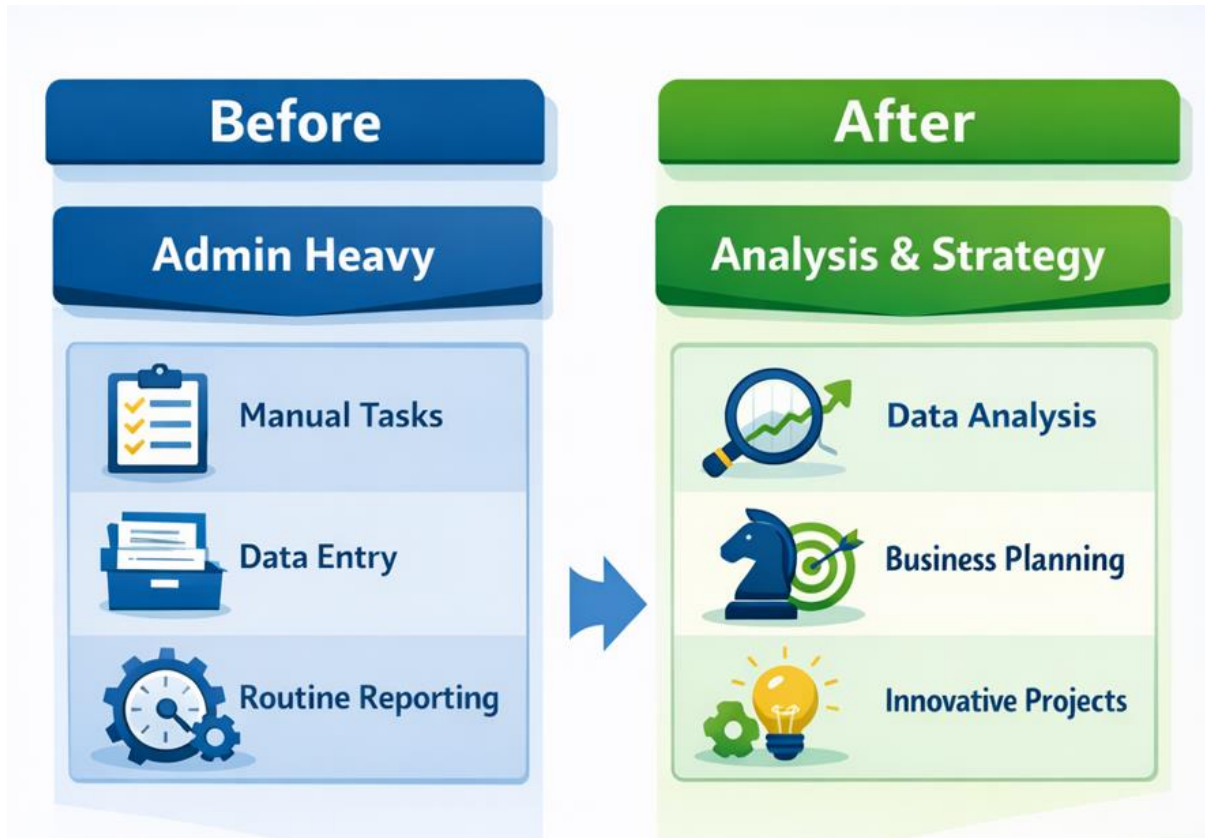
People, Not Technology

Concerns	Our Approach
 Fear of Job Loss	 We Invested in People
 Trust in Automation	 No Workforce Reduction
 Change Resistance	 Focus on Upskilling Clear Growth Path



Growing & Elevating Our Team!

Workforce Transformation



The opportunity is transforming people

- **Structured Development**
- Recurring training sessions
- Development session
- Lunch & learn
- Hands-on learning
- Continuous development culture

The Learning Communities Programs

12 Team Members Initially Identified are Now Leading These Programs

MAP – BI & Automation

— From Ideas to Production —

- Identified Automation Opportunities
- Built BI Tools & Workflows



Output

-  **49** Forms
-  **17** Power Apps
-  **177** Automations
-  **76** Dashboards



Impact


Expanded into Ops, QA, HR

VISTA

— Forecasting Excellence at Scale —

- Led Assessments & Training
- Standardized Methodology

Impact

-  Improved Forecast Accuracy
-  Increased Transparency & Consistency

Enhancement

— Optimization & Best Practices —

- Tool Optimization Genesys, AI, Copilot
- Standardized Insights

Impact

-  Faster Analysis
-  Higher Quality Decisions



Feedback from WFM Analysts

"I have seen a noticeable positive impact on day-ay workflow. The reduction in manual, repetitive tasks has improved and has allowed **more time for in depth analysis for forecasting, skill development**, etc. The automation has been a strong step forward, and I'm optimistic about continued enhancements."

Eatasia, WFM Analyst

"The bots have given me back a lot of time and I'm looking forward to using more automation as it comes.

I can now:

- Focus more on the Forecast
- Analyze deeper in Schedule Efficiency and meeting monthly goals.
- More time to work on Monthly Deck
- Focus more on RTA



Looking forward to **more time to take Training courses/development"**

Debbie, WFM Analyst

"The bots have taken my work day from what feels like constant drowning into a deep breath. I can walk away from my laptop after 8 hours and not feel like I have to check it again before I go to bed. I'm not as fearful of what I will walk back into in the morning."

Sam, WFM Analyst



"The bots are an excellent feature and work well, I love them because they give me more time to **focus on development and other tasks"**

Allison, WFM Analyst

Questions



Contact Information



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Please take a moment to complete the session evaluation!