

Scheduling Through Staffing Credits – A Proactive Staff Scheduling Theory

By Fahim Khan

Staff scheduling is now becoming a greater challenge in fast paced environments like call centers and in the areas where specialized staff is required to perform their duties on hourly basis. Each hour the managers have to ensure their productivity and customer satisfaction while managing a greater task of staff satisfaction.

Productivity in such environments comes through team efforts, which means that a team achieving the top most service levels is a combination of people having different levels of expertise. Achieving highest service level is always a common goal of any team and to ensure high-end results, managers manipulate with different scheduling styles and strategies to make a perfect combination at any particular time with the perfect and optimum strength.

Scheduling through staffing credits is basically a manpower planning theory that emphasizes on making a perfect team with an optimum strength that can face the projected/expected workloads with the highest service levels. The process is simple and straightforward; all we need is to be proactive and productive at all times. These two Ps are the basic requirements and are needed in working styles for all the successful managers. Being proactive in staffing is to have excellence in making projections and drawing expected level of workloads with good qualities of understanding environments and environmental changes. Following seven-step model of staff scheduling enables you to develop perfect teams to achieve your desired service levels with an optimum strength. Here the model is explained with the real life examples of a service departments:

1) Data/ Information Collection From All The Possible Sources That Could Affect Your Workloads: Information collection is the first step of doing any job, which provides the bases of your existence and your team's strength. In a nutshell, this tells you, your future work to do!

In service departments the main source of information is from marketing and sales departments. These two departments are responsible for keeping track of their market and its growth. Lets say if you're implementing this theory for a call center and this is not independent and is associated or is part of any organization, your sources may also include other service and support departments. Managers should be aware of all of the customer contact activities going on within or outside the organization. It's not only to focus on external environments or the marketing and sales departments but to also focus on operational and supporting activities happening throughout the Information Technology department or the one that is responsible for printing and mailing because that can also be a cause of increasing and bringing waves in your workloads.

2) Calculating Projected / Expected Workloads: Information enables you to workout your future workloads, in manufacturing or even in the service industry workload calculation it's an important job and it's always based on your collected information. In call center environments typically it is called expected call volumes. Perhaps, the term "expected call workload" is better suited as it's not only the call volume that increases; it also affects the entire work, all processes and all functions.

Your collected information gives you the growth ratios and this helps to draw projection of workload. For example, your sales department is expecting ten percent growth and you're aware that the 10 percent growth brings in around six percent increase in call volume. You should then use this information in your expected workload calculations.

3) Find Out Any Expected Change: This is basically part of your information gathering exercise but normally it is referred to the changes on temporary basis and brings waves to the workloads.

For example your marketing department is launching a new product or running a campaign to the customers. This will be termed as an expected change as this will have to be informed to all the related parties before the impacts. Your workload will also increase according to the change.

4) Incorporate Impacts of Expected Change and Percentage of Unexpected Variances: Your normal workload expected volume needs to include the expected change which may be increasing or decreasing. However, you should also expect the unexpected changes and based on these expectations, you should decide the percentage of variation.

Normally managers take five percent variation for such unexpected changes but this percentage may vary from different environments, industries and the frequency of such changes is also accounted for.

5) Ranking the Workforce: Rank each staff from zero to five where the level five is the maximum and should be given to the best employee of your team. Workforce dependent service departments are basically similar to the typical factory work environments except for having specialized staff to do the same jobs. This needs high level of motivating factors to keep them consistent in performance and to ensure improvement with the differentiation of their rising levels. Generally, an agent takes one and half year to touch the burnout situation. However, keeping their timely elevation by performance based hierarchy levels can extend this duration.

For instance an agents' working lifecycle at call center should be projected in a way that an average agent should be touching the peak in two and half years. This can only be achieved by keeping them motivated at all times. An agent's performance levels are to be designed in a flexible manner and should be realistic to achieve. The most important thing is to give them giveaways and other related incentives based on your company's incentive policy so there's a difference at every level.

6) Set standards and Calculate Your Optimum Staffing Credits: Staffing credit is the major component of this theory, which sets this theory apart from any other. It may be similar to the skill-based strategies but here the emphasis is to make benchmarks of your number of credits for your desired level of service levels at any point in time. Seven-step model gives you the requirement of your staff and their required expertise to achieve desired consistent Service levels at any point in time. Following are the seven steps to calculate staffing credits:

- a) Benchmark the per hour service level for each operating hour you work.
- b) Build a test team and schedule them for an hour (Test team should not be the combination of best people rather should contain people from every level of ranks from zero to five)
- c) Put them to work and monitor with your best monitoring staff in a normal course of the business
- d) Measure their service levels

- e) Accumulate staffing credits of your test team (this is done by adding each staff's ranking in your test team for the duration when testing is done). For example, if you have six people and they rank 1, 0, 2, 2, 3 and 4 respectively, then your staffing credits will be 12.
- f) Now, look at your service levels and match your staffing credits with them. Lets say if your bench mark was 90% of service level and you achieved 75% with the 12 credits then you might need to do a retest by rescheduling with the higher number of credits. This may also require increasing the number of staff in the test team.
- g) Bearing in mind that achieving the benchmark only allows you to make standard staffing credit requirements for that particular time and day. Therefore, you will have to do similar multiple tests of different staffing credits for different working hours and days; however, prior to conducting those tests, you will need to gather the necessary information and requirements

7) Scheduling For The Month or Week: Now when you have your staffing credit requirements you should proactively schedule your team for entire week / month to achieve best service levels. Schedules are normally set for the whole month or in some cases weekly scheduling are also in practice. Monthly scheduling through staffing credits is carried out by putting the total credit requirements for each hour in one column and then schedule the required staff having the same accumulated levels to meet the required staffing credits. While scheduling, you will be aware of your present and needed strength by knowing the number of credits you have in your teams.

Each of these seven steps is important to achieve the desired consistent service at all times. However, ranking of each employee also provides you an excellent way to leverage against the possibilities of diminishing motivation levels of your team and makes them enjoy their work throughout.

This staffing credits strategy is very easy to adopt and very useful for work environments where the number of employees is greater than 15 and productivity / service-levels are measured on hourly / daily basis. In this context, workforce dependent managers are the most relevant users of this strategy as it fulfills their requirements to reduce the thought process in staff scheduling and bring relief by giving an easy way to make all the teams on an even strength basis and helps to build a performance-based hierarchy. This may also result in organizing healthy competitions among the teams and can bring improved organization across all the levels.

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