

## **Workforce Optimization for the Small to Mid-Size Contact Center – Why NOW is the Time**

One of the most critical elements of running a call center is making the most of personnel resources – hiring the best people, getting the “just right” number of staff in place each half-hour, maximizing schedule adherence, and tracking/communicating performance numbers. These workforce optimization functions are even more critical in a small to medium sized center given the percentage of impact on service and cost that just one person can make. However, many smaller centers assume they’re not a candidate for workforce optimization solutions given their smaller budgets and limited resources to manage the process and technology. In reality, these centers can implement processes and find effective tools that match their needs from a cost and simplicity standpoint. This whitepaper is specifically designed to help the small contact center understand applicable tools, techniques, and strategies to make the most of their valuable personnel.

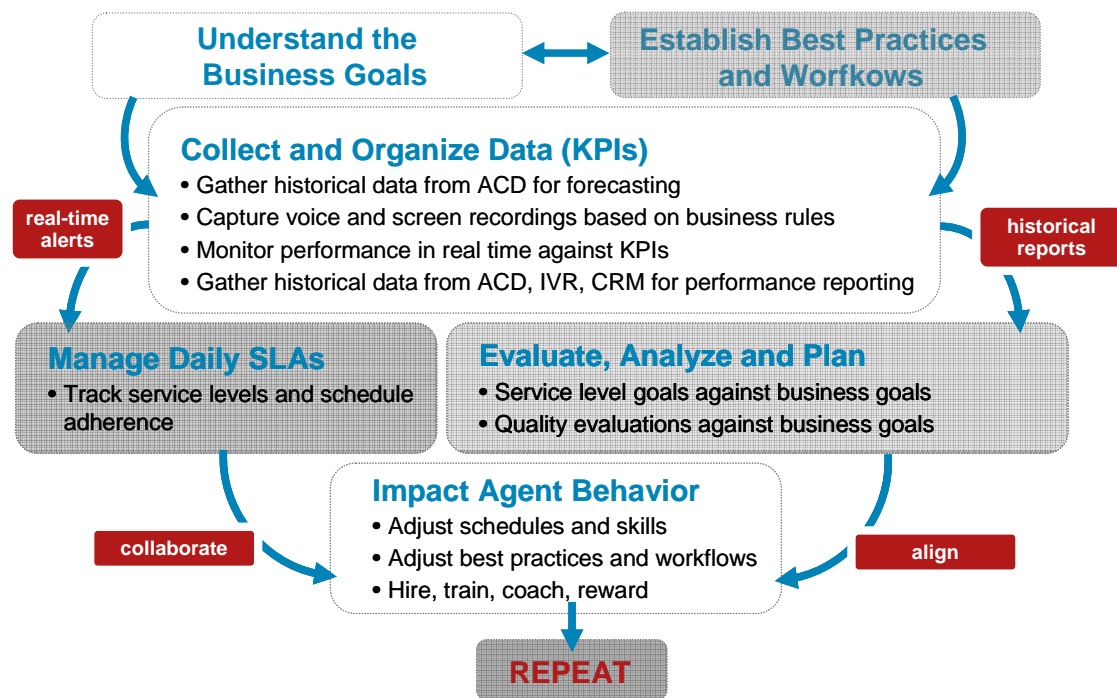
**One person has a greater potential  
impact on service and cost in a small  
or medium sized center.**

While many call centers are viewed as tactical operational departments where cost should be minimized, the reality is that customer interactions are a major influence on customer loyalty and retention. In a recent survey of 2500 consumers commissioned by the outsource provider Converso, 96% of the respondents indicated that they would seriously consider changing a provider if it meant it was easier to contact a customer service representative for inquiries. Another study by Harris Interactive shows that 80% of consumers will never go back to an organization after a bad customer service experience, up from 68% in 2006. To add to the challenge, a Pelorus study indicates that 60% of contact centers are now expected to produce revenue and the number is growing. So customers are more demanding and customer service is clearly strategic.

### **What is Workforce Optimization?**

The contact center is all about the people and processes – the customers/prospects, the agents who handle the customer contacts and the supervisors who manage the agents and processes. Let’s take a look at this graphical depiction of the contact center management process.

# Quality and Process Optimization



Any performance management and continuous improvement process must begin with the contact center’s overall business goals. How can the contact center contribute to the company mission and vision? You should start with your enterprise strategy and ensure that the people, processes, and technologies in your contact center support the business. Strategies are set at the top and the metrics reported and used in the contact center must show progress toward the strategies. For example, when a center is focused primarily on cost minimization, pressure can be put on reducing average handle time (AHT). But this may be counter to an overall business strategy of increased revenue to cross-selling and up-selling, or even the strategy that maximizes customer satisfaction and retention.

Let’s look at the contact center from the perspective of the people and what they want.

- **Customers** typically expect the company to respect their time, solve their problems or handle their inquiries, and treat them as valued assets.
- **Agents** want to be treated with respect and with understanding that they have a life outside of the center. They expect to be provided with the tools and training needed to do a good job including timely feedback on their performance and ways to improve.
- **Supervisors** (and frankly all levels of management) want a trouble free day, optional solutions to problems that do develop, easy access to information on “how is it going” and a clear indication when it is time for intervention.
- **Executive management** wants customers who will recommend the company to their friends, employees who stay with the company and continue to grow, and maximized net profitability.

While some of these desires may seem to be in conflict with one another, they must be effectively balanced to ensure the best results. The processes and technologies of workforce optimization (WFO) can significantly contribute to ensuring all of the stakeholders get what they want.

So what does WFO require? It starts with a clear definition of goals that align with the business strategy and support the brand image. These goals ensure satisfied or even delighted customers and employees, maximize revenues and minimize costs. Once the goals are established, the metrics that are used to manage the center and are reported to senior management must show how the center is contributing to and meeting these strategic goals. Of course, just because you can measure something doesn't mean you should, and just because you should measure it, doesn't mean it will be easy. You don't have to use every number produced by your systems, but some of the most relevant numbers such as first call resolution percentage will be difficult to calculate.

There are some tools that help to deliver WFO. These include:

- Workforce Management (WFM) – This is the system/application that helps to plan for the right number of people with the right skills in the right place at the time to quickly respond to customer contacts. This responds the customer customer's expectation to respect their time.
- Quality Monitoring (QM) – These tools help supervisors to identify training and coaching needs to improve agent performance. This helps agents develop and grow with continuous feedback and improves the customer experience.
- Agent Desktop Tools – These applications give agents all of the information they need to help the customer quickly and with quality. These include information about who the caller is, interactions that have taken place in the Interactive Voice Response system (IVR) prior to the customer coming to the agent, account data, key performance indicators (KPIs) and all the tools needed to do a good job.
- Supervisor Desktop Tools – These tools ensure that the supervisor/manager has the information needed to measure performance such as reports in real-time and historical analysis. They also provide the tools needed to impact behavior such as alerts and coaching/training needs.

Taken together, WFM and the agent desktop tools give frontline staff access to the schedule information so they can be more responsible for their own adherence to the plan. This integration also supports an agent's ability to request shift trades, vacations and other time off. Combining the QM systems and supervisory desktop tools enables the supervisor to access complete information on agent performance to identify training and coaching needs as well as performance excellence to be rewarded.

## **What Does WFO Deliver?**

What are some of the potential benefits of implementing a WFO strategy? At the highest level, senior management will better understand how the contact center contributes to the success of the company when metrics reported to them are tied to the corporate goals such as revenue and customer/employee retention. Customers will have more positive and consistent experiences including shorter wait times and higher first call resolution rates. Agents will take more responsibility for their schedules and behaviors when information is readily available and feedback is consistent. And the voice of the customer is heard throughout the organization so that all areas can focus on improving products and services.

The contact center demonstrates its value to the organization through contribution to the enterprise goals, but also through building internal partnerships with departments who need customer feedback. Marketing needs to know if campaigns are effective and how customers are reacting to offerings. Product management needs to know what customers like about current offerings and what features should be on the priority list for future developments.

## **Traditional Obstacles and New Options for Smaller Centers**

The challenges for smaller organizations with smaller budgets have been significant. The capabilities needed required multiple separate systems often from separate vendors including workforce management, quality monitoring, CTI-driven tools and customized integrations among these systems and others. This was too expensive and complex to implement, had long learning curves for the operators, was difficult to support and even to get the integrations working, and the return on investment was not obvious. And even if the ROI was identified, coming up with the resources to handle the implementations and manage the systems ongoing often proved difficult as well.

Today, the options available for smaller centers are much more viable. Packaged solutions are available that combine the capabilities into integrated capabilities to meet multiple needs. They combine applications that already work together so no integrations are needed reducing time to implement, cost, and the risks of project failure. The applications come in building blocks so that a center can select those capabilities needed now knowing that they can add the others later without major challenges. The systems are scalable so that they can grow from only a few agents to very large without a “forklift upgrade”, retraining, or even down-time as the operation grows. They are typically a lot easier to deploy, administer and to use than ever before.

This may be a place where the newer tools for the smaller centers such as those that are Voice over Internet Protocol (VoIP) enabled are making unified IT environments more affordable. Many smaller centers are also dispersed to multiple locations with just a few people servicing customers in several locations, but VoIP technologies make it viable to unify them into a single operation on an affordable basis. That makes it possible to more effectively manage for operational excellence and standardization of processes and customer experiences.

## **What to Expect from WFO Applications**

Even though one of the biggest benefits of the WFO solution is the tight integration of the various elements, let's take a look at the individual applications and what should be expected in that tool. It makes little sense to compromise on the needed capabilities just to get it all in one package from a single vendor.

### **Workforce Management**

The following capabilities should be provided in a workforce management tool to support the effective planning and utilization of the center's most expensive resource, its staff:

- Accurate forecasts, optimized schedules, and real-time management
- Historical and real-time schedule adherence monitoring
- Scheduling for skill-based, non-call and outbound
- Performance based ranking available
- Multi-site and multi-channel support
- Multi-lingual interface
- Integrated with Quality Management and desktop tools
- Web access for agents and managers with KPI reports, dashboards and graphs
- Vacation planning, seating plans, and payroll integration available

### **Quality Management**

The quality monitoring and management system should be designed to capture information needed to review the interactions between agent and customer to ensure that they are accurate and high quality. In addition, the systems should support the analysis of the recorded data for business intelligence mining. The expected capabilities include:

- Voice and screen recording
- Agents can be anywhere (IP technology)
- Lower cost through centralized hardware
- Works with your ACD and agent desktop tools
- Records agent and customer speech (separately improves options for analysis)
- Workflow-based call selection rules
- Customizable contact evaluation forms
- Multiple dashboard reports for manager, agent and supervisor

### **Reporting and Analytics**

Once the data has been captured, the reporting and analytics systems convert that data into information that can be used to run and improve the business. The expected capabilities include:

- Comprehensive reporting and analytics for your ACD and operational tools
- Assimilates and presents data from multiple systems (i.e., ACD, IVR, CRM, etc.)
- Web-based business intelligence reporting engine to allow access from anywhere (with password protection as appropriate)
- Simple process for users to set up reports with Wizards to assist
- Agent scorecards
- Dashboards for real-time performance and analysis
- Scales as you grow

### **Desktop Tools**

Presenting of customer data and tools for contact handling to the agents improve call handling and first call resolution, while data presented to the supervisors and managers aid in performance management. The expected capabilities include:

- Works with your ACD
- Agent desktop
  - Presents caller information and call control features
  - One-click automation of routine operations via the task toolbar
  - Provides performance reports and snapshots of crucial metrics
  - Integrates with WFM for schedule access
- Supervisor desktop
  - Displays real-time metrics and alerts
  - Provides access to QM system and recorded calls
  - Provides collaboration and intervention tools to help agents meet customer needs
  - WFM interface for access to real-time and historical reports

### **Tips for Success**

The good news is that today, even a small contact center can have all of these capabilities in a tightly integrated package, and at a cost that can be easily justified by the benefits provided. It is not necessary to compromise on the capabilities, or to dedicate massive resources to implementation and ongoing management.

To maximize the success of any WFO acquisition and implementation project, it is necessary to set clear goals. Measure the “before” situation so that you can compare the before and after results and clearly demonstrate the success.

Start out with something that you can accomplish relatively easily. Get it working well and then move on to the next application. There are business decisions to make, procedures to establish and internal communications to be set up in each application. It is good to think about how they impact one another, but it may be best to concentrate on one at a time to maximize the results.

Get the training from the vendor, not just at implementation time, but for new employees using the systems ongoing. Insist that the vendor set up the training using your data, not some demo data that is meaningless to you. It is extra work for the vendor, but the value it will add to the training is significant.

When you are searching for the right product, define your processes and make sure the system can meet your unique needs. But this is a great time to rethink “the way we’ve always done it” and improve the operations with new tools to enable the processes.

Get everyone involved. All of the stakeholders including agents, management, supervisors, and even customers should be brought into the vision of what you are trying to accomplish. Each has a role to play in ensuring success and each have needs that must be met along the way. So ensure that you have built in time for interactions on the front end and after the implementation to ensure that all are delighted with the final outcomes.

### **Summary**

There is no need to wait any longer. Even small centers can find the tools that will help them to maximize their operations and make significant contributions to organizational success. With the planning and management tools in hand, the center can focus on delivering the value of the company to its customers, maximizing net profitability, employee retention, and market share for the company overall. It is not just about efficiency – it is all about effectiveness.

### **About the Author....**

Maggie Klenke is a Founding Partner of **The Call Center School**, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs at the manager, supervisor, and frontline staff level. Klenke is the author of *Business School Essentials for Call Center Managers*, as well as other call center management books. She can be contacted at: [maggie.klenke@thecallcenterschool.com](mailto:maggie.klenke@thecallcenterschool.com) or 615-812-8411.

