



Contact Center Forecasting and Scheduling Best Practices

Learn how Workforce Management Software is preferable to spreadsheets for creating more accurate forecasts and optimized schedules.

MONET | SOFTWARE

Contact Center Forecasting and Scheduling: Best Practices

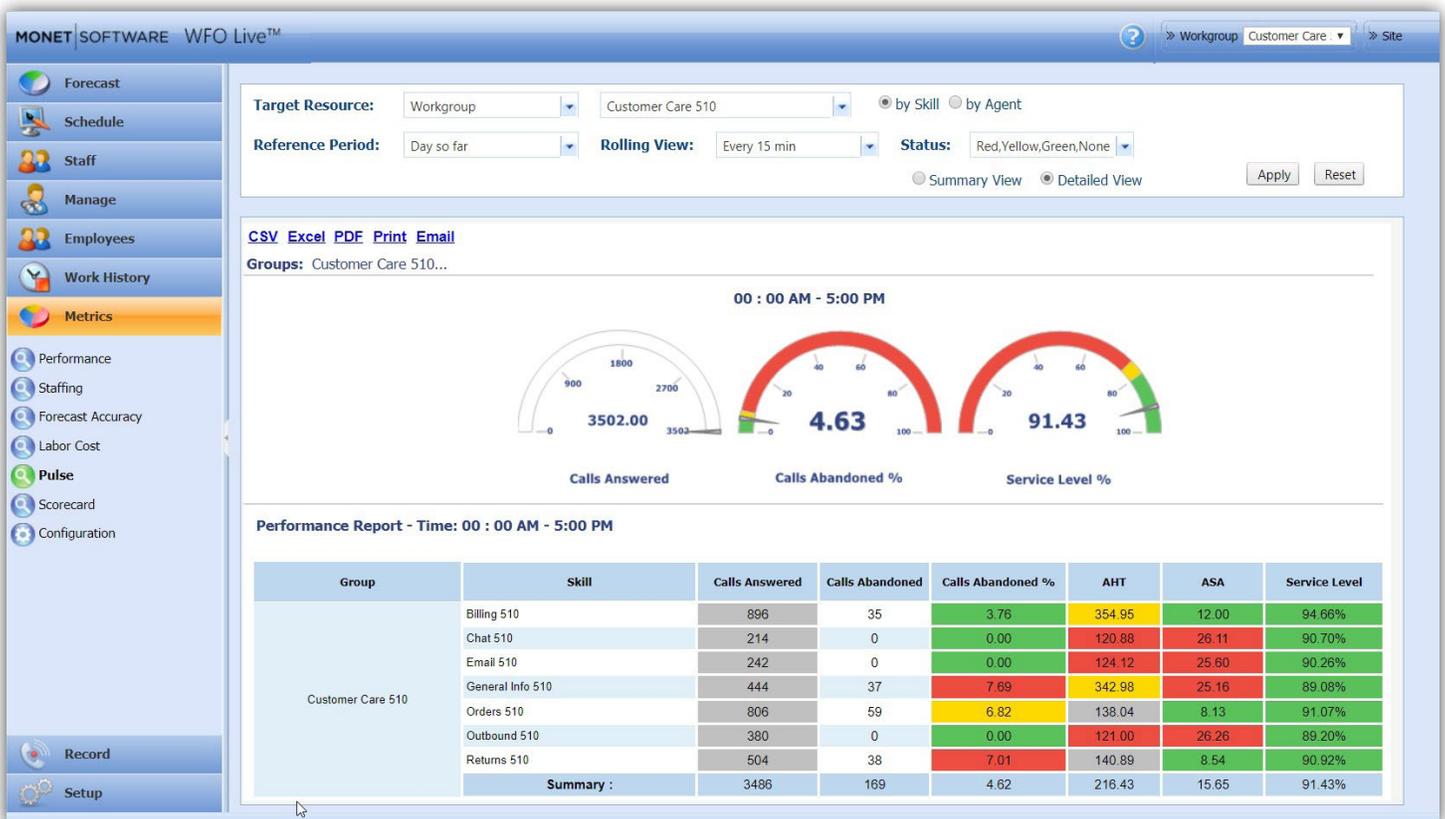
Forecasting and scheduling are vital components in the success of every contact center. Each plays significant roles in budgeting, customer service and agent satisfaction, so there is no room for miscalculation.

Correct forecasting and (to a lesser extent) scheduling is both an art and a science. The scientific component utilizes specific calculations of specific numbers, to create agent rosters for a shift or time period. But numbers alone cannot quantify the skills of individual agents, varying start times, end times and break times, or the ever-present need to change personnel based on unique circumstances. Thus, creativity is required from the contact center manager as much as cold calculation.

The Traditional Method: Spreadsheets

At least 20% of contact centers still use spreadsheets for forecasting and scheduling. However, with this method precision calculation is more difficult, if not impossible.

A spreadsheet can be used to calculate workforce percentages, but precise forecasting requires more in-depth analysis.



Example: A manager reviews a forecast and finds an overall weekly variance of 4%. This figure is reached after a week in which the Monday forecast was 12% under call volume, Tuesday was 8% under, and Wednesday through Friday were all 8% over projections.

While 4% seems encouraging, it does not account for how customer service may have suffered on Monday and Tuesday by an insufficiently staffed contact center. In this case, instances of overstaffing and understaffing

canceled each other out, resulting in a favorable forecasting picture at an inefficient business.

This manager may feel good about a 4% variance, but he or she is overseeing a center that is routinely missing service levels, likely resulting in dissatisfied customers.

Consider also the impact that inaccurate forecasting has on agents, who may either be sitting idly in a cubicle or stressed to keep up with unanticipated call volume.

Forecasting can be rendered more accurate through the use of a simple standard deviation approach, and by examining intra-day forecast accuracy as well as just how close the daily or weekly numbers compared to the forecast. With spreadsheets, the manager faces a much more daunting challenge in tracking, monitoring and improving schedule adherence.

A Better Way: Workforce Management

An automated workforce management (WFM) solution can improve forecast accuracy, making sure all the necessary resources are always in place. It can also streamline the scheduling process.

Forecasting

Conceptually, creating a forecast is creating a model, and historical data is necessary for an accurate model. Past activity is always the best predictor of future activity, especially when broken down into ever-smaller increments of time. This makes it easier to identify anomalies and prepare accordingly.

The selection of which historical data is most important is the key to creating a reliable forecast. This will vary depending on business type. A company with a monthly sales cycle will be different than a seasonal business. For some forecasts data from the previous year will be critical; in some cases, call volumes from last week will be more important.



Typically, a manager may start with monthly and weekly stats, and then delve deeper into daily and hourly numbers, perhaps even examining work periods as short as 15 minutes. With WFM, it is much easier to analyze call types, call volume and call patterns. Note past variations, determine their cause, and forecast accordingly for that same time period.

Next, forecast special days or other events that impact call volume. In some cases, such as an annual holiday, the variance is likely to repeat; in others, such as a temporary power outage, the same variance is highly unlikely. Additional "special day" provisions should also be made for other factors, including any company marketing campaigns or events, and perhaps even weather patterns.

All of these calculations may be done manually with a spreadsheet, but it's much faster and more accurate to work with real-time and historic call data collected by a WFM system. WFM also allows for more detailed and specific forecast simulations.

Once all of this data has been reviewed, you'll be ready to prepare a forecast, assess staff requirements and create a schedule.

Scheduling

The objective for a contact center manager is to create a schedule that balances agent needs vs. contact center capabilities, and that accounts for shrinkage and exceptions.

Spreadsheets are adequate for fixed schedules – but contact center schedules rarely stay fixed.

A WFM system provides the flexibility to automatically manage start times, end times and break times. Spreadsheets cannot match this speed and efficiency, which results in unhappy agents and higher shrinkage.

When agents can work the hours that work best for them, service levels improve. While every request may not be accommodated, especially when some agents work part time and others work from home, every time a day off request can be granted or an exception approved without impacting service level, it encourages positive job performance that reflects satisfaction with the company. Employee turnover will be reduced as well.

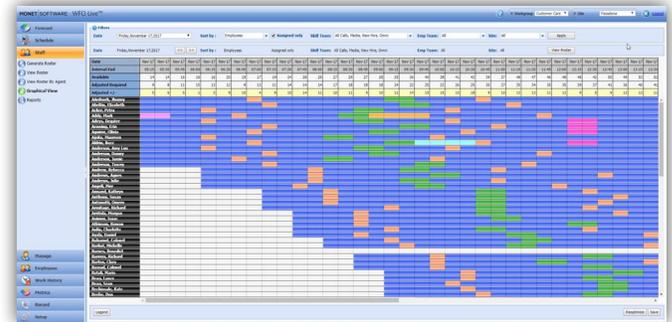


However, part of best practices in scheduling also depends on hiring agents that are open to schedule flexibility. This is necessary to meet customer service targets with fewer personnel, and to avoid overstaffing.

Such flexibility can be encouraged through incentive programs, with more amenable agents receiving preferred shifts or higher compensation. Contact centers should also have a clear tier system in place ranking agents by skills based on call type. The ultimate goal is to have only agents that are capable of handling every type of customer call. Thus, performance remains consistent no matter how schedules may fluctuate.

Once a manager has calculated and planned resources requirements (by reviewing forecasting data and defining acceptable service levels on ASA, AHT and other factors), intra-day adherence tracking is another significant component of a best practices approach.

Tracking adherence following a shift or a day is a missed opportunity to correct any issues more quickly. Such tracking is practically impossible with just a spreadsheet. Spot-checks can be beneficial, but without the real-time tracking provided by WFM there is a much higher risk of over/under staffing, shrinkage and missed service levels. WFM also provides insight, through dashboards and real-time alerts, into which agents are meeting their schedule obligations, and which may require additional guidance or training.



WFM and Agent Productivity

Workforce Management (WFM) can play a prominent role in engendering employee satisfaction, particularly in the areas of schedule flexibility and online collaboration between agents and supervisors. In addition to more efficient skill-based scheduling, which improves both employee confidence and customer service, the reporting and transparency tools offer more accurate assessments of agent performance.

Choosing a WFM Solution

Different contact centers have different priorities, and these should be reviewed so any WFM solution will increase efficiency and service levels, while also reducing costs. Here are some of the more significant evaluation criteria for any WFM software solution.

Capabilities

Capabilities should include accurate call volume forecasting from historical data and ACD integration, flexible schedule creation that incorporates foreseen and unforeseen variables, agent exceptions, intra-day changes to both forecasting and scheduling, and performance management reports.

Implementation

Calculate how long the software will take to implement, and how quickly it should begin paying dividends.

Integration

How well will the system work with the contact center's existing hardware, for such necessities as sharing of vital data? Will custom integration be required?

Cost

Incorporate upfront costs, ongoing monthly or maintenance costs, and any hidden costs. Can the system be used over the web without equipment purchase?

Usability

How long will it take for agents to get comfortable with the system? Is it confusing? Are there too many features that you may not need, but that can complicate usage?

Unification

How unified will the user experience be across solution components? Will the dashboards show everything necessary to monitor a call and discover how and where corrections should be made?

Metrics

Besides forecasting, scheduling and adherence, other key WFM metrics that should be able to be reviewed via dashboard include call answer times, first call resolutions and transfer rates.

Scalability

Can the solution grow with the contact center? Can modules be added without additional hardware costs?

ROI

What will the return on investment (ROI) be, and how quickly will any software investment be recouped?

Conclusion

Accurate forecasts are vital to contact center customer service and budgeting, and avoiding additional issues that occur when the center is overstaffed or understaffed. Forecasting methods must take into account changing business needs, seasonal volumes and external events that are outside the company's control.

Those still using spreadsheets for these functions are missing out on the convenience, efficiency, flexibility and functionality of workforce management. The calculations necessary for optimal forecasts and schedules are very difficult to do with Excel. WFM has sophisticated simulation processes that tell a contact center how many people they will need and when they will need them.

Is there an optimal use for spreadsheets? Perhaps – where the call flows are the same every hour of every day. Unfortunately, such a contact center does not exist. When call volume changes, spreadsheets are insufficient.

With WFM, managers can get back to managing people, instead of spending hours on Excel planning forecasts and schedules.

About Monet WFM

Monet Software is a global provider of workforce optimization software solutions for contact centers and helpdesks. Monet's cloud-based solution is an affordable and easy to use workforce optimization software solution, which includes workforce management, call recording, quality assurance, and performance management.

Contact centers and helpdesks will start improving service levels and reducing center costs without the upfront expenses and IT requirements of traditional workforce software.

For more information about Monet Software, please call 310-207-6800 or go to www.monetsoftware.com

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