

Workforce Management Process: The Feedback Loop

The Call Center Learning Center is excited to announce a new tutorial series on workforce management in call centers. This tutorial series will pull from Prosci's research-based toolkits and best practices reports. [Module 1](#) introduced the workforce management process. [Module 2](#) took a closer look at collecting personnel data and determining staffing level projections and agent schedules. This module focuses on measuring schedule adherence and performance. Module 4 will conclude the series with best practices in workforce management.

The Workforce Management Process

The workforce management process was introduced in [Module 1](#) of this tutorial series. Workforce management is an **ongoing process** that requires monitoring and adjusting to the dynamic customer demand patterns and agent availability. Figure 1 illustrates the workforce management process.

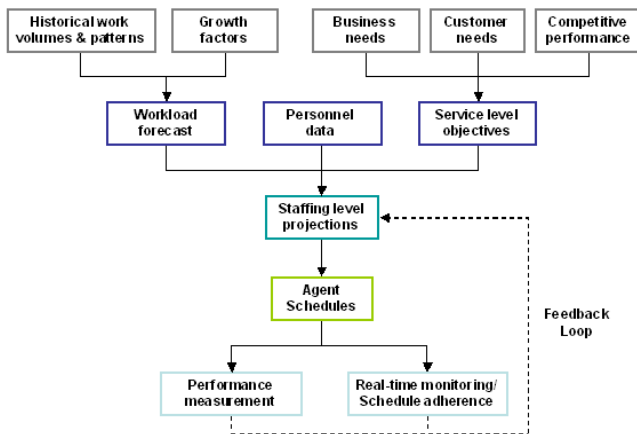


Figure 1 - Workforce management process

This module, the third of four in this series, will address the measurement and monitoring aspects of the Workforce Management Process.

Ongoing monitoring and adjusting

Organizations that strive for excellence are constantly **evaluating and modifying processes** to improve service to customers and achieve greater efficiencies. Workforce management is one such process that must be monitored and adjusted as changes occur in your organization or call center.

Possible changes that would require WFM process adjustment include the following:

- existing processes are unclear, outdated, or incomplete
- new products or services are offered
- new regulations or policies are introduced
- new computer systems are introduced
- reorganization results in a change in work assignment or in work flow
- customer expectations and needs change

It is important to note that changes do not have to be drastic to require adjustment in your WFM process. You may determine that your staffing level projections were inaccurate or the schedule just isn't working. As illustrated in Figure 2, performance measurement and schedule adherence must be monitored to enable the **feedback loop** that leads to changes in staffing level and agent schedules.

The three steps that comprise the feedback loop will be covered in this tutorial. They include:

1. **Measure performance**
2. **Ensure schedule adherence**
3. **Integrate feedback into WFM process**

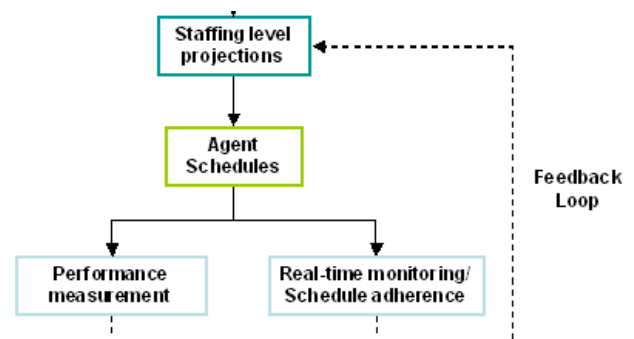


Figure 2 - Workforce Management Process Feedback Loop

Step 1: Measure performance

Before determining your staffing level projections, you should have set your service level goals (as described in [Module 1](#) of this series). Service level is a snapshot view of how well the call center is answering incoming calls (or contacts in a multi-media environment).

If your call center is not meeting its service level goals, you can improve your **service level performance** by undertaking one of the following improvement efforts:

- Improve staffing levels
- Reduce handle time
- Reduce call volume

For specific information on how to address these improvement efforts, see the [Controlling the Cost of Call Center Operations Toolkit](#), a comprehensive guide to lower costs and improve service level with short-term quick hits, mid-term tactics and long-term strategies.

Ongoing service level management will continually influence your staffing level projections and agent schedules. Determining how often to measure service level will depend on contact volume and contact patterns. A call center with dramatic peak contact periods may require more frequent service level measurements than a center with stable contact volumes.

While service level is one of the most common performance measures for a customer service center, you may also want to consider what your customers would care about. They probably do not care about your math equations, but they do care about the speed at which their requests are addressed. Additional measurements, such as speed of answer and one-call resolution rate, may also need to be considered to **ensure satisfied customers**.

Step 2: Ensure schedule adherence

Schedule adherence is a measure of whether agents are **following their schedule**, i.e. reporting to work, logging in, and taking breaks and lunches as planned. If the agents are following their schedules as planned, they are considered "in adherence" to the schedule.

Factors influencing schedule adherence can include the following:

- an agent calling in sick
- an agent being late from lunch or break (or simply taking longer breaks and lunches)
- an agent going to lunch or a break late due to a long call
- training

Adherence is calculated in the same way as agent availability. Adherence, however, also accounts for **when an agent is on the phone**. Let's assume an agent is scheduled to be available 6.5 hours in an 8 hour day, and breaks and lunch are scheduled for 10:00, 12:30 and 3:30. Schedule adherence measures the total availability and the degree to which the agent took their breaks and lunch as scheduled.

Real-time adherence software can also be used to track if your agents are "in adherence" or "out of adherence." This will enable you to automatically keep track of who is on the phone, who is not, who is late going to break, and who is late coming back from lunch.

If you find that schedule adherence needs to be improved in your call center, the most important way to do so is to **educate agents** on the importance of schedule adherence to the overall call center's performance. You should also continually measure agents based on how well they adhere to the schedule and keep them informed if they are doing well or need to improve. Additional improvement areas include:

1. Make supervisors available to coach and support new personnel.
2. Make the schedule easy to read and understand.
3. Allocate time away from the phone to correlate with your call volume.
4. Be flexible with breaks, lunches, and training to accommodate call volume.
5. Use workforce management system software to track schedule adherence and provide agents with individualized reports.

Step 3: Integrate feedback into WFM process

The feedback loop is an **essential component** of the Workforce Management Process. The conclusions you can draw from measuring performance and schedule adherence will help you to reevaluate your staffing level needs and agent schedules, as illustrated in red in Figure 3. To ensure that your measurements are accurate before making adjustments to staffing levels and schedules, it is recommended that you use the [Call Center Measurement Toolkit](#) as a guide for calculating and benchmarking your metrics.

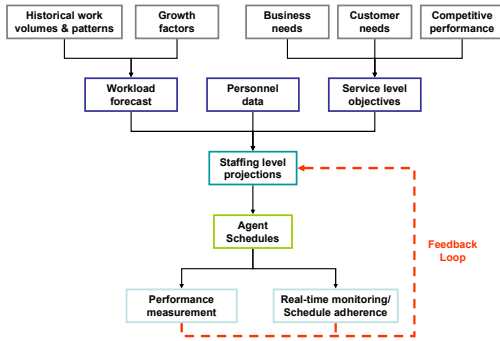


Figure 3 - Integrating feedback into Workforce Management Process

Still to come

The last module in this Call Center Learning Center tutorial series will feature **best practices** in workforce management practices and systems, based on data collected from 240 companies on what has worked and what has not worked in call center management, operations and technology.

Resource guide

Benchmarking Reports and Management Toolkits

[Call Center Measurement Toolkit](#)

How to measure and improve call center performance; an excellent guide to developing a performance measurement system with concrete recommendations for improving call center performance. Learn how to accurately measure service level, agent utilization, schedule adherence, and several more performance measurements essential to workforce management.

[Controlling the Cost of Call Center Operations](#)

How to cut costs and improve service level in your call center; a systematic approach to expense reduction, this toolkit provides over 50 initiatives to cut costs, including short-term quick-hits, mid-term tactics and long-term strategies.

[Call Center Planning and Design Toolkit](#)

A comprehensive guide to call center strategy, planning and design; an excellent resource for new contact center start-ups, existing call center improvement and future planning with detailed templates and planning roadmaps. It includes detailed information on the Workforce Management Process and how to select an appropriate WFM system for your call center.

[Call Center Best Practices - Operations Edition](#)

Benchmarking report - Over 240 call centers from around the world share how they have improved service quality, productivity and customer satisfaction. This report shares lessons learned by call center managers regarding their most effective management practices. It also includes best practices in workforce management.

[Call Center Best Practices - Technology Edition](#)

Benchmarking report - this report shares lessons learned by call center technology managers regarding the most effective applications, systems and technologies that are having the greatest impact on call center efficiency, employee effectiveness and customer satisfaction. The report also includes in-depth data on best practices in workforce management tools and systems.