



## Best Practices in Workforce Management

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. [Module 3](#) focused on measuring schedule adherence and performance. This module concludes the series with best practices in workforce management.

Prosci and the Call Center Learning Center gathered data from 240 companies from over 50 countries to determine **what is working** and **what is not working** in call center operations, management and technology. This tutorial features select workforce management best practices that were collected in our latest study.

### Top workforce management changes

**Effective workforce management** is an essential component to operating a productive and efficient call center. Participants regularly cited hiring, staffing and forecasting as both **short-term and long-term challenges** they face in their call center. Therefore, managers and supervisors are constantly looking to make improvement changes to workforce management practices in their call centers.

According to the latest best practices study, the top changes made to improve call center workforce management were:

1. **Forecasting and planning** more accurately by:
  - using **historical data** to forecast future patterns including forecasting peak periods more accurately (see [Module 1](#) for more information on historical data and forecasting)
  - hiring more part-time staff to **cover forecasted peak periods**
2. Implementation of **new software and automation**, such as:
  - off-the-shelf **scheduling software** and forecasting)

- adding **ACD and IVR technology** to provide customers with improved routing and automated services

3. Introducing **performance-oriented reward systems**, including:

- **productivity measurement** and real-time performance stats
- better tracking of **schedule adherence** (see [Module 3](#) for more information on measuring schedule adherence and productivity)
- **more frequent** performance appraisals and feedback including managing by objectives (MBO)

Other popular changes for WFM improvement were:

- Scheduling **breaks and lunches** to ensure little or no overlap
- Changing **work schedules** to better fit personalities and people, including permanent work schedules that fit the CSR's needs (see [Module 2](#) for more information on gathering personnel data)
- Increasing overall staffing and/or overtime
- **Extending the hours** of the call center or **expanding service** to serve customers better and stretch out peak calling times
- Introducing a **set rotation of split shifts** for equitable work distribution

As for changes in workforce management **systems and technology**, participants listed a number of changes that they plan to make to their workforce management tools in the future, including the following:

- Introduce a **new workforce management application** or upgrade to additional features
- **Integrate** the workforce management system with other programs and databases
- Implement **real-time adherence tracking** in the workforce management system
- Introduce **better forecasting tools** into the applications to optimize scheduling accuracy

### How workforce management is conducted

Participants were also asked about their current workforce management processes and practices. As shown in Figure 1, two-thirds of participating call centers currently perform workforce management manually or with spreadsheet tools such as Microsoft Excel. Less than 30% use off-the-shelf workforce management applications.

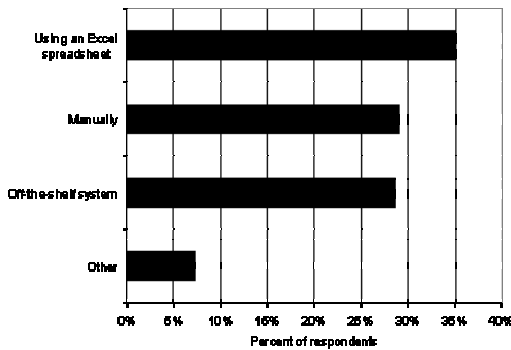


Figure 1 – How workforce management is conducted

While most call centers used the core features of scheduling, forecasting and reporting, only 40% used real-time schedule adherence features (see Figure 2, note that participants could choose more than one feature).

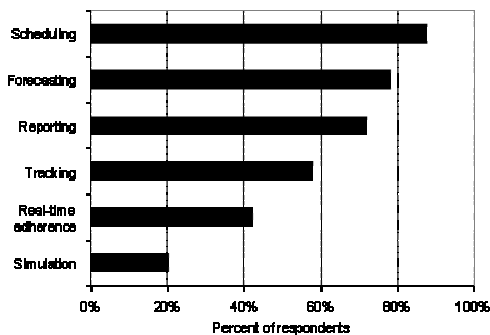


Figure 2 – Workforce management features in use

**Setting the scheduling priority** is a common challenge for many call centers. Scheduling priority refers to the decision-making process for which agents receive their preferred work times.

As shown in Figure 3, 40% of participants stated that they set scheduling priority based on **performance**, while only 35% set scheduling priority based on **seniority**. The category of "other" in Figure 3 included responses for first-come, first-serve scheduling, associate or staff preferences, a combination of seniority and performance and a rotating point system where everyone is treated equally with a rotating schedule.

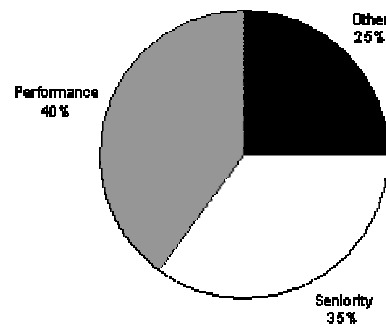


Figure 3 – Determining scheduling priority

### Applying best practices in your call center

The goals of Prosci's best practices research are to:

1. Enable call center managers to uncover the **most effective management practices**, based on benchmarking research.
2. **Identify operational and technological changes** that are having the greatest impact on customer satisfaction and call center efficiency.
3. Share the most current performance objectives and results for call centers by industry.

The data presented in this tutorial can be used by your call center to ensure that it is moving in the **right direction** and benefiting from the **lessons learned** by other call centers. The complete [Call Center Best Practices Report](#) also covers quality monitoring, training, outsourcing, performance benchmarking, cost data and other valuable data.

## ***Resource guide***

### **Benchmarking Reports and Management Toolkits**

#### **[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.

#### **[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.